

Brandon Roberts + Associates

***SCHOOL-TO-WORK IN OREGON:
PROGRESS IN BUILDING A STATEWIDE SYSTEM
FOR EDUCATION IMPROVEMENT***

**A REPORT TO THE STATE OF OREGON
Office of School-to-Work, Department of Education
Office of Job Training Partnership Administration
Workforce Quality Council**

**Prepared by:
David Gruber
Brandon Roberts**

May 1997

TABLE OF CONTENTS

PREFACE

EXECUTIVE SUMMARY 1

CHAPTER I: INTRODUCTION 12

CHAPTER II: BUILDING A STATEWIDE STW SYSTEM 17

CHAPTER III: JTPA 8% AND RWQCs CONTRIBUTIONS TO STW 32

CHAPTER IV: OVERALL THEMES AND RECOMMENDATIONS 40

PREFACE

This assessment of Oregon's progress in implementing its School-to-Work (STW) initiative as part of an overall education improvement agenda required an intensive review of a large number of activities. It involved discussions with dozens of Oregonians across the State, most of whom openly provided all the information requested, and in the process, showed great interest and concern in working to improve the quality of Oregon's education and workforce development system. The cooperation of these individuals is greatly appreciated.

Unfortunately, the project team members could not speak to every pertinent official or visit every place in the State. We hope that the observations and conclusions drawn from those people and places we did visit accurately capture the general state of affairs found across the State. As in any assessment of program effectiveness, certain sensitivities to program performance emerge. The project team attempted to draw fair and reasonable conclusions about such performance; however, we readily acknowledge that, in making general statements about conditions for the State as a whole, we fail to recognize the individual efforts, both positive and negative, of specific places and programs. Such omissions are in no way intended to demean the commitment, energy, and sense of responsibility that characterize the professionals and citizens involved in these activities.

Oregon's efforts to develop a world class education and workforce development system are well known and respected across the country. This assessment found a number of exemplary activities in all parts of the State. Many of these endeavors represent innovations and successes that are worthy of replication by others in Oregon and elsewhere across the country.

This assessment, however, is not intended to highlight these successes. Instead, it is focused on whether these successes and other efforts are pointed in a direction that will fundamentally transform Oregon's approach to education and career preparation for all students in all places across the State. Achieving that goal is, unquestionably, one of the most difficult challenges confronting public officials and other stakeholders in Oregon today, or for that matter, any place in the country. To date, no state has achieved it. Clearly, Oregon, as much as any other state, has outlined a vision and laid a foundation to meet the challenge. The central question today, as reflected in this report, is whether the magnitude of what needs to be done exceeds the level of priority, resources, guidance, and attention given to the effort.

In no way should the contents of this report be used to suggest that recent activities have failed. Instead, this report should be seen as an articulation of the reality that the demands of education and workforce systems change have heretofore exceeded expectations. It is hoped that these observations and recommendations will be seen as possible ways to strengthen continuing efforts to improve Oregon's education and workforce development system, and, serve as a catalyst toward that end.

To the extent that this report contains errors, omissions, or other shortcomings toward this objective, the project team assumes full responsibility.

David Gruber
Brandon Roberts

May 1997

EXECUTIVE SUMMARY

This report presents key observations of an assessment of Oregon's progress in implementing its school-to-work (STW) initiative. It is focused on the relationship of STW to the State's overall education improvement agenda. The central issue of this assessment is the extent to which STW is part of institutional and systemic efforts to transform Oregon's approach to academic learning and career preparation.

The study was commissioned by the School-to-Work Office of the Oregon Department of Education (ODE), the State office of the Job Training Partnership Administration (JTPA), and the Oregon Workforce Quality Council (WQC). It was conducted by the consulting firm of Brandon Roberts + Associates. David Gruber served as project manager and was primarily assisted by Brandon Roberts.

The assessment was conducted over a five-month period from July through November 1996. The study focused on the STW activities within eight of Oregon's fifteen workforce development regions. Information was also collected at the State level. Altogether, the consultants gathered information from close to 150 individuals across the State involved in STW, education, workforce development, business, and other relevant activities.

An important consideration for the assessment is the realization that STW implementation is a work in progress that is at the midpoint in the State's five-year implementation schedule. Mindful of this fact and other factors, the study is not designed solely to determine if certain STW outcomes have been achieved, such as the introduction of contextualized and applied learning in all schools. Instead, the study seeks evidence that regions have a vision, strategy, commitment, or even intention to move toward desired STW outcomes. To this end, the assessment seeks to understand the content of a region's STW vision/strategy and the extent to which the vision is shared among key local partners, such as teachers, administrators, parents, businesspeople, workforce development specialists, etc.

It has been recognized from the outset that this study is measuring progress toward the highest goal possible -- systems change. The challenge of achieving this outcome is not to be underestimated, although it is essential that the study look beyond the individual actions of certain schools or programs and measure progress of the education and workforce development systems in their entirety.

FINDINGS

Achieving systemic education improvement is challenging work. Although Oregon schools and regions have made progress on a number of fronts, much needs to be done if Oregon is going to realize its vision of education improvement and do it in a way that takes advantage of the opportunities presented by the STW initiative. At this time, however, it appears that Oregon's future for institutionalizing its statewide STW vision is uncertain, particularly around three major goals: 1) incorporating STW principles into education improvement; 2) integrating major programs, resources, and institutions in support of STW;

and 3) serving all students, in all places, across the State. The assessment found four overall themes or issues that influence STW implementation throughout the State.

1) The need for clarity in the role of STW in education improvement

Legislative and personnel changes have altered the role of school-to-work in Oregon's educational improvement agenda. One strong finding of the assessment is that, while there is a broad recognition that change has occurred in the education improvement vision, there is an equal if not greater level of confusion over what this change might mean and what role STW can or should play in Oregon's continuing efforts toward school improvement. This study raised a key question: Is State policy toward education improvement still predicated on the belief that academic and career learning together are necessary to prepare students for a productive adult life?

The results of this assessment make clear that few educators believe there is a State policy that actively promotes the five key principles articulated in the State's vision for STW -- 1) high standards, 2) career awareness, 3) contextualized learning, 4) work-based learning, and 5) post-secondary transition -- as integral and related elements of school improvement. Instead, there is prevailing confusion over State education policy and ODE's message. Grouped under the near unanimous local belief that ODE is not delivering an integrated message are several overlapping opinion strands:

- *For all practical purposes, education improvement means implementing the Certificate of Initial Mastery (CIM)*
- *The Certificate of Advanced Mastery (CAM) emphasis on integrating work and learning is diminished*
- *School-to-Work is not a priority*

Together, these local perceptions have undermined the initial broad vision of integrating education improvement and workforce development. To many, the message received from the State is increasingly the traditional one of academic standards taught through conventional methods and shorn of any real connection to career or workplace learning.

2) The need for stronger State leadership

Linked inextricably to local confusion over the State vision for education improvement is a strong perception that the State is not providing leadership to regions, communities, or schools in envisioning or implementing a school-to-work strategy. This perception is felt in almost every aspect of the school-to-work initiative, beginning with the lack of any clear message. This is evident in a number of our findings:

- *Lack of coordinated State strategy*
- *Lack of State direction for related initiatives*
- *Lack of priority for professional development to promote STW*
- *Insufficient State attention to implementation*

Together, these findings argue for a revised view of the State role. The Oregon model for implementation was predicated on regions, communities, and schools having the vision, capacity and political support to put school-to-work in place. In practice, it is clear that this kind of “bottom-up” implementation will not occur except in isolated instances. The regions visited made clear the need for State “direction.” The success of STW will depend on the State’s willingness to set priorities, put them in place for State programs and resources, and then to assist regions, communities and schools in undergoing a similar process.

3) The need for clarity in the roles, responsibilities, and authorities of Regional Workforce Quality Committees (RWQCs)

To date, RWQCs have made minimal progress in fulfilling their responsibilities to guide and oversee local policy issues concerning the emerging workforce. RWQCs, in general, do not engage in education issues or have strong ties to the education community. In fact, the greatest challenge currently confronting RWQCs in effectively implementing their STW programs is “getting school-to-work into the schools.”

Several RWQCs, however, have not let this uncertainty deter their desire to establish effective organizations that legitimately consider all aspects of workforce development policy within their regions. Even in these instances, RWQCs have experienced difficulties and tensions with other groups in the community, particularly education institutions. The situation is compounded when there is a general feeling that the leadership of the State ODE is ambivalent at best about the existence of RWQCs and their role in STW and education improvement. Without clear articulation from ODE leadership and the State Board of Education that RWQCs are a legitimate and important force for STW and education improvement in the State, it will be difficult for RWQCs to forge the needed alliances with local education communities.

4) The need for enhanced RWQC staff capacity

An ongoing issue for RWQCs is the commitment to staff capacity in addressing the complex issues of workforce development and STW. The assessment found that, in general, RWQC capacity is far short of what is needed. Addressing the variety of areas that encompass workforce development -- education, job training, welfare reform, and economic development -- requires extensive knowledge about the vast set of policies and resources that influence activities in these areas. One half-time or even full-time staff person for all of these issues seems woefully inadequate. Staff capacity is further stressed when responsibility for considering the policy implications of these issues is combined with responsibility for administering a three-year STW grant involving hundreds of thousands of dollars.

RECOMMENDATIONS

A set of recommendations for strengthening STW implementation in Oregon follows. These recommendations are offered from the perspective that STW is an important resource for education improvement.

Regional and Local Recommendations

The assessment identified a number of points at the regional and local levels that warrant attention if improvements are to be made in STW implementation. This project also provided follow-up guidance and technical assistance to regions based on the findings of the assessment as the consultants worked with three regions during the period of January through March 1997. These efforts confirmed the assessment findings, as well as emphasized the need for the regional and local STW leadership to reassess their approach to STW implementation. Actions warranting consideration include:

➤ **Make STW a priority of RWQCs (i.e., emerging workforce) and assert the authority of RWQCs to engage in education improvement matters**

The most important issue currently confronting RWQCs, as found through this assessment, is “getting school-to-work into the schools”. The need to address this situation was highlighted during the technical assistance visits, when educators and businesspeople alike expressed a willingness to forge stronger alliances to achieve STW goals and to do so using the RWQC as the key forum for action.

Steps regions can take to address this situation include:

- Reconstitute STW leadership so that educators -- especially superintendents and principals -- comprise a significant portion of the group.
- Under reconstituted leadership, map out a regional vision and strategy for education improvement that acknowledges the role of STW and defines STW as an approach to education, rather than a set of work-based activities.
- Undertake a specific communications plan designed to build a cohesive vision for education improvement and STW across the region.
- Position the RWQC to play a role in the review of local school improvement plans, particularly to see that the needs of the emerging workforce and the principles of STW are reflected in such plans.

➤ **Reformulate regional implementation plans to better target STW efforts to meet the education needs of school administrators, board members, site council participants, parents, and teachers**

With a reconstituted vision of STW and education improvement, regions can undertake and support a set of activities designed to transform local approaches to academic learning and career preparation. An important element of this effort, as emphasized during the technical assistance visits, is the need to show

the connection between STW activities and education improvement initiatives. RWQCs should consider recasting their STW activities to address specific schools needs and do so in a way that engages both administrators and teachers, as well as board members, site council participants, parents, and businesspeople. Areas for possible attention include 1) achieving the CIM; 2) achieving the CAM; and 3) improving alternative programs.

➤ **Devote more resources and attention to acquiring necessary professional assistance to support the efforts of RWQCs**

To effectively fulfill their responsibilities for STW and other workforce development initiatives, RWQC members must become masters of the complex issues that they seek to manage. Experienced and informed staff are key to this. Possible ways to achieve this goal include a) paying higher wages to current staff positions to attract more experienced and knowledgeable personnel; b) devoting more grant funds to personnel to increase number of staff; and c) soliciting donated staff from local workforce and education agencies.

RWQCs must also solicit assistance from the State. Whether requesting the assistance of ODE/STW staff or others in state government, RWQCs should develop an annual technical assistance plan that maps out their needs for assistance and expected outcomes from such assistance. This planning should be conducted at least annually by each RWQC, as well as by a collective group of RWQCs that can identify common technical assistance needs across the State.

➤ **Develop meaningful and realistic plans to sustain RWQC efforts at STW and education improvement after the conclusion of the federal STW grant**

Sustainability comprises two separate, although related issues. First is the issue of sustaining the RWQC-sponsored infrastructure or capacity for fostering STW. The second is sustaining the ongoing transformation of education instruction integral to STW and education improvement. Opportunities for financing/sustaining education transformation activities are easily identified, but not easily realized. A number of potential resources -- Title 1, Goals 2000, JTPA, ADM¹ -- offer possibilities. Opportunities also exist for redeploying or redefining the responsibilities for existing school personnel, such as work-experience coordinators and counselors.

➤ **Advocate for clear direction and support from the State on incorporating STW activities in education improvement**

It is important that RWQCs identify and collectively advocate for State action and support on a number of fronts. The most important issue for regions at this time is the need for clarity on the role of STW in the State's education improvement agenda. This action needs to be taken at the highest levels of state government, which include the State Board of Education, ODE, and the newly formed School

¹ ADM stands for "average daily membership" which is the term representing State education funding to schools for each pupil. It is used here in the context of financing transformation efforts for alternative students.

Transformation Advisory Council and its Implementation Team.

Action on these issues will not insure the success of STW or education improvement at the local level. Much work will still need to be accomplished by the local groups involved in improving the education and workforce development systems. Without such action, however, these local groups will have little ability to make significant progress, no matter how committed and effective their actions might be. Such actions will also likely lead to only modest progress without significant changes at the State level.

State Recommendations

Oregon's approach to implementing its federally funded STW initiative vested significant authority and responsibility in the regions and localities. Through this assessment, it has become apparent that such responsibility cannot be totally devolved. The State has clear responsibilities that must be asserted to both guide and assist localities in carrying out their activities. Specific recommendations on how the State can strengthen its efforts include:

➤ Develop a single education improvement vision with a defined role for STW

The experience of some schools suggests that incorporating STW principles as a “way to learn” can aid schools in achieving the higher education standards implicit in CIM, CAM, and other reform initiatives. The ODE, in conjunction with the State Board and the School Transformation Advisory Council, should consider formally restating its overall position on education reform, through a single statement or policy that clearly articulates the connections between STW principles as a means of educating and engaging students and achievement of state-mandated standards for CIM, CAM, PASS and PREP.²

To encourage superintendents and principals to broaden their view of education reform, ODE's policy statement should lay out the specific STW elements that can contribute to achievement of CIM and CAM competencies. To make these changes meaningful to superintendents, principals and teachers, ODE will need to incorporate them both in the School Improvement Plans (SIPs) and throughout its continuing monitoring, technical assistance, and evaluation efforts. The State Board statement that STW is integral to school improvement efforts is a good foundation for continuing improvement in the SIP process. ODE should work to ensure that plans specifically address the issue of connections between school-to-work and CIM, CAM, PREP, and PASS.

➤ Develop a state-level operational strategy that includes coordinated planning between agencies and integration of key programs and resources

As Oregon's regions seek to sustain school-to-work efforts in the face of diminishing federal funding, key potential resources remain separate and disconnected. The State needs to consider two tasks: 1) employing the education improvement agenda as a planning framework for individual funding streams,

² PASS, Proficiency-Based Admission Standards System for Higher Education; PREP, Proficiency Requirements for Entry into Programs of the Community Colleges

and 2) using this agenda as the basis for interagency planning.

The first task is to incorporate the education improvement agenda in federal and other funding streams outside the mainstream of education reform. ODE and the State office should consider providing school districts with a vision for Title I-funded programs that includes achievement of high standards; contextualized and career-themed learning; and promotion of post-secondary connections and other key elements of the education reform agenda. Beyond ODE, other State agencies such as community colleges, juvenile justice, and welfare have a vested interest in promoting the full education improvement agenda, including school-to-work principles, and, as such, should be included in this effort.

The second task requires the State to appoint a cross-agency task force to explore how all youth serving agencies and institutions can support the education improvement agenda. This agenda of this task force should include consideration of:

- A common vision and statement of principles for all youth-serving programs;
- The role each youth-serving agency can play in advancing this vision;
- Immediate opportunities for institutional linkages, including expansion of current 2+2 programs, expansion of the role community colleges play in high school curriculum development, and promoting connections between community colleges, alternative programs and juvenile justice programs;
- Immediate opportunities for resource redirection and integration, including linking welfare development block grant funds, state education funds, JTPA funds, and juvenile justice funds; and
- Common benchmarks and standards.

Oregon's new structure for education and workforce reform provides a platform for advancing some of these opportunities. The State should consider state-level integration as a necessary part of this agenda.

➤ **Focus resources on professional development , with an emphasis on integrating academic and professional/technical education and school and work-based learning.**

Perhaps the strongest finding of this assessment is the near (and rare) consensus on the need for professional development focused on the education improvement agenda. Although there is an equally strong consensus that overall resources are limited for new professional development, there is unrealized potential in incorporating STW principles in existing professional development efforts. Given the breadth of the education improvement agenda, professional development sponsored by the State, Education Service Districts (ESDs) and local school districts, as well as that organized around initiatives, such as the SIPs, Title I, Special Education, and Carl Perkins should be viewed as opportunities to infuse STW principles. Professional development should emphasize opportunities for contextualized learning and for blurring or erasing the line between academic and professional technical educators. Where feasible, professional development should include both academic and vocational teachers and should focus on opportunities to jointly work toward integrated curriculum, applied learning, and team planning and teaching.

➤ **Develop a substantive technical assistance strategy to aid RWQCs, communities, and schools in rethinking workforce development strategies**

The State should provide strategic assistance to individual RWQCs in the current uses and potential redeployed uses of pertinent program activities and resources. Assistance should be focused on specific opportunities for development of an integrated workforce strategy, including:

- Enhancing connection with community colleges and higher education;
- Linking STW with achievement of the CIM and CAM;
- Using ADM to support STW strategies for alternative programs;
- Connecting JTPA funded summer program to STW strategies;
- Linking Title I and STW; and
- Integrating ongoing welfare reform with STW.

ODE's School-to-Work Office can take the first step in this effort by developing conceptual models for each area that show the opportunities for redirecting current activities and resources to advance the STW initiative.

If Oregon is to effectively continue its STW initiative, the State and regions must give serious consideration to these recommendations. Failure to consider these matters may jeopardize long-term education improvement and workforce development efforts, particularly as matters relate to the willingness of the private sector to engage in future education improvement efforts (e.g., work-based opportunities for the CAM). In many respects, the issue is not whether STW succeeds as a program in Oregon. In fact, the effort might be better served by discarding the term "school-to-work" and directing attention to the idea of STW as an approach to education. Perhaps the most critical issue confronting Oregon's education and workforce development leaders is the extent to which the five core principles Oregon articulated as the foundation for the STW initiative serve as the driving force for education improvement for all students across the State.

I. Introduction

This report presents key observations of an assessment of Oregon's progress in implementing its school-to-work (STW) initiative. It is focused on the relationship of STW to the State's overall education improvement agenda. The central issue of this assessment is the extent to which STW is part of institutional and systemic efforts to transform Oregon's approach to academic learning and career preparation. To this end, the study was not designed to assess the achievement of specific STW outcomes, but rather to ascertain whether the State and localities have a vision, strategy, commitment, or even intention to incorporate STW principles and implementation activities into education improvement efforts.

The study was commissioned by the School-to-Work Office of the Oregon Department of Education, the State office of the Job Training Partnership Administration, and the Oregon Workforce Quality Council. It was conducted by the consulting firm of Brandon Roberts + Associates.³ David Gruber served as project manager and was primarily assisted by Brandon Roberts.

This report is organized in four parts. This first part describes the purpose and parameters of the study. The second part presents the consultant's observations about Oregon's progress in developing a statewide STW system, outlining key objectives of a comprehensive STW effort that seeks to achieve systems improvement for all student learning and career preparation efforts. The STW system is defined as comprising three key elements: 1) the infusion of school-to-work principles in all student learning; 2) the integration of related institutions, programs, and resources; and 3) the inclusion of all students. The third section focuses on two specific elements and their possible contribution to STW development: a) the use of JTPA 8% funds to further STW activities; and b) the role of regional workforce quality committees (RWQCs) in shepherding STW implementation at the local level. The fourth and final section describes significant themes or issues identified through the study and offers recommendations to the State and local RWQCs for strengthening their efforts to fully implement STW across the State.

³ Brandon Roberts + Associates is a national economic and workforce development consulting firm based in Baltimore, Maryland. The firm has extensive experience in Oregon, including conducting an *Evaluation of Oregon's Regional Strategies Program* (1992) and an *Evaluation of Oregon's Workforce Development System* (1995). The latter study involved examining a number of State education and workforce development programs, as well as the activities of Regional Workforce Quality Committees (RWQCs). The knowledge gained from that evaluation was invaluable in conducting this assessment.

Purpose of the Study

Oregon has one of the most comprehensive and ambitious school improvement efforts of any state in the country. A critical element of that effort is the State's STW initiative. Consistent with the national STW legislation, Oregon envisioned STW as a foundation for the State's school improvement agenda. As the State's application for federal funding notes:

In an effort to prepare its young people for...[global competition], Oregon embarked on a sweeping education reform movement aimed at world class excellence for its students and workforce. As part of this effort, Oregon has already begun to plan for a comprehensive school-to-work transition system.... Through a system that provides intensive work-based experiences integrated with school-based learning and supporting activities, students will acquire the skills and knowledge that are necessary to compete in the global economy and that promote life-long learning.⁴

The system envisioned by the State is one in which STW and academic frameworks are inextricably linked. The application describes an education reform plan where:

The School-to-Work Opportunities System and the implementation of the Certificate of Initial Mastery (CIM) and Certificate of Advanced Mastery (CAM) will be mutually supportive.... School-to-Work programs will provide the career awareness and exploration components of the CIM and the avenue for work-based experience required by the CAM. Conversely, the CIM and CAM will provide the institutional structure necessary for school-to-work transition to be maintained when federal funding is terminated.⁵

Important to the Oregon vision was the idea that STW and education reform would be part of an overall state system for workforce development. This system was to encompass the key elements of education reform, job training, and economic development, as well as involve a partnership between the State and the recently constituted regional workforce quality committees. This

⁴ Oregon Department of Education, Application for Federal STW Assistance, April 1994, p.1.

⁵ Ibid. p. 12.

effort was new to Oregon and represented one of the “most bold, innovative and comprehensive workforce development visions of any state in the country.”⁶

Oregon’s school improvement effort is five years old. The State is also midway through a five-year STW implementation plan, much of which is funded with national STW funds. Given the importance of this issue to Oregon’s future economic competitiveness, the three State organizations noted above commissioned this study to assess whether the State and localities were taking all the steps necessary to institutionalize STW statewide as an integral part of education improvement.

The three organizations were aware of a number of impressive STW activities across the State. They also were mindful of the challenges of fully implementing a statewide, comprehensive STW system and the fact that current federal STW implementation funds would end in some regions within the next year. With this in mind, the study was designed to specifically address the issue of State progress in STW and the possible need for mid-course modifications to insure the desired outcomes. As such, the assignment was to not only assess progress, but also to identify appropriate areas where technical assistance could help the implementation process. Consistent with its national leadership role in education and workforce development improvement, Oregon is the first State to conduct such an assessment on its own.

Parameters of the Study

The assessment was conducted over a five-month period from July through November 1996. Technical assistance activities followed from December through March 1997. Although the study is designed to represent progress made throughout the State, the consultants did not gather information from each of the 15 RWQCs, 210 school districts, or 1200 school buildings. Time and costs prohibited such an exhaustive study. Instead, the study focused on the five workforce development regions participating in Oregon’s Workforce Option (OWO), plus three additional regions.⁷ The consultants also gathered information at the state level. Altogether, the

⁶ Brandon Roberts + Associates, *Building a High-Wage, High Performance Economy: An Evaluation of Oregon’s Workforce Development System*, Oregon Workforce Quality Council, January 1995, p. 138.

consultants gathered information from close to 150 individuals across the State involved in STW, education, workforce development, business, and other relevant activities.

Local visits were made to each of the eight regions, and on-site interviews were held with staff and private sector board members of the RWQCs, STW steering committees, and JTPA organizations; representatives of the local community college, juvenile justice entities, regional strategy boards, and local alternative and special education programs; and educators affiliated with the local educational service district, school districts, and schools in the K-12 system. In addition, the consultants conducted focus groups with teachers from each of the five OWO regions. At the State level, the consultants interviewed all the senior policy officials of the Oregon Education Department, the Governor's policy advisors for education and workforce development, staff of the State School-to-Work Office, Workforce Quality Council, JTPA program, and community college system, as well as leaders of the Oregon Business Council and the State STW advisory committee.

An important consideration for the assessment is the realization that STW implementation is a work in progress and was planned to take place over a five-year period. The consultant's were aware of this fact, as well as several other conditions. First, the funds committed to the STW effort amounted to less than originally planned. Oregon received \$18 million in federal funds, almost fifty percent less than the \$35 million requested. Second, Oregon chose to roll out its STW implementation phase through the RWQCs over a three-year funding period, rather than over the maximum allowed period of five years. Third, the 1991 statute providing the foundation for Oregon's education improvement initiative -- Oregon Education Act of the 21st Century (HB 3565) -- was significantly amended and revised in 1995 (HB 2991). Fourth, funding of the K-12 education system was impacted by the enactment of the tax relief initiatives known as Measures 5 and 47.

Mindful of these factors, the study is not designed solely to determine if certain STW outcomes have been achieved, such as the introduction of contextualized and applied learning in all schools. Instead, the study seeks evidence that regions have a vision, strategy, commitment, or even intention to move toward desired STW outcomes. To this end, the assessment seeks to understand the content of a region's STW vision and the extent to which the vision is shared among key local partners, such as teachers, administrators, parents, businesspeople, workforce development specialists, etc. It has been recognized from the outset that this study is measuring progress toward the highest goal possible -- systems change. The challenge of achieving this

outcome is not to be underestimated, although it is essential that the study look beyond the individual actions of certain schools or programs to measure progress of the education and workforce development systems in their entirety.

The following sections present the observations and findings of this assessment. As noted earlier, these observations and findings represent a snapshot in time and are presented as generalizations for the State as a whole, although, admittedly, there is great variation from place to place.

II. Building a Statewide STW System

The major focus of the assessment is an examination of Oregon's progress in developing a school-to-work system. For this purpose, a system is defined as comprising three key elements: **1)** the infusion of school-to-work principles in all student learning; **2)** the integration of related institutions, programs, and resources; and **3)** the inclusion of all students. Objectives are identified for each of these elements and provide the basis for assessing the State's progress to date in meeting them.

Element One: Infusion of School-to-Work Principles In Student Learning

In initially envisioning a school-to-work strategy, Oregon planners developed a set of principles to serve as a framework for continuing education improvement that would be reflected in the schools and in all education and training programs targeted to youth. The State's initial application for school-to-work funding, and the national STW vision, suggest five objectives or principles encompassing this framework:

Objectives:

- 1) *An emphasis on high standards*, including a focus on both academic and work-based competencies;
- 2) *An emphasis on career awareness*, encompassing the full range of career opportunities;
- 3) *An emphasis on contextualized learning and career themes*, including development of career majors and integration of career themes in academic core courses;
- 4) *An emphasis on work-based learning opportunities*, ranging from field visits through job shadows and internships;
- 5) *An emphasis on transitions from high school through post-secondary training, higher education, and career employment*, as well as transitions between elementary, middle, and secondary education.

Findings:

1) STW is not seen as a tool or resource that can contribute to the development and achievement of high academic standards

Underlying Oregon's vision for school-to-work is the fundamental tenet that the school-to-work principles outlined above can serve as a "way of learning": an educational strategy that will enable students to achieve designated academic goals. Our finding, however, is that many, if not most, superintendents, principals, and teachers interviewed either do not accept this belief or have not put it in practice. School-to-work is largely viewed as an entirely separate strategy or program, unrelated to achievement of academic standards and even incompatible with this goal. STW is primarily seen as a work experience program, not an approach to education.

Throughout the eight regions visited, there is near unanimity on the importance of the Certificate of Initial Mastery (CIM) as the prime educational priority for schools. As will be discussed further below, the CIM is seen as a State priority or even mandate; consequently, school officials regard achievement of CIM standards as a measure of their own performance. Although some school officials subscribe to the original vision that STW principles are a means to achieving CIM standards, the majority see little relation between STW and academic goals. Most superintendents and principals interviewed regard school-to-work not as a school-based learning strategy but as a separate program to provide students work-based learning opportunities *outside* schools.

To some school officials, in fact, STW and achievement of academic standards are not only separate but mutually exclusive: with limited resources and time, a number of principals and superintendents see CIM and key school-to-work principles -- contextualized learning and linkage of school and work-based learning -- as competing priorities.

2) There is limited emphasis on career awareness

The implementation of school-to-work offered schools an opportunity to rethink Oregon's long-standing requirement for career education. As noted in the Mathematica Policy Research report, some schools have focused on career guidance in a general way, emphasizing the progression of choices students need to make as they advance through school and beyond.⁸ A number of

⁸ Paula Hudis, Mathematica Policy Research, Inc., *School-to-Work Implementation: 1996 Progress Report on Oregon*, January 1997, p. 11.

schools, for example, encouraged students to develop individualized career plans that would be periodically updated.

Interviews in the eight regions, however, suggest that few schools have fulfilled the original State vision of linking career awareness or guidance to career-themed instruction, using school-to-work as a framework to introduce students to a variety of different career options. With significant exceptions, schools also did not appear to emphasize the particular educational and skills requirements of given career areas. At the high school level, particularly, it appears that few schools provide all students a general introduction to career options, to particularly fast-growing or promising career areas, or even to careers with a strong employment base within the region. Seemingly more typical is a focus on general world of work or employability skills. This is an unrealized opportunity to make school-to-work more relevant to classroom teaching and to link it to achievement of the CIM. As noted earlier, STW was to provide the career awareness and exploration component of the CIM. This component apparently has been lost as the CIM has evolved to focus almost exclusively on academic standards.

Schools that were CAM developmental sites or that are implementing CAM strands (see below) are more likely to offer career awareness, with a focus on careers in the CAM area. Some middle schools that have adopted career themes also place greater emphasis on career awareness in theme areas.

3) Emphasis on contextualized learning and career themes is evident only in isolated places

Oregon's initial vision and implementation of school-to-work placed strong emphasis both on development of career majors in designated career strands and on integration of career strand themes in academic core courses -- English, math, social sciences and science.

Our findings, however, are that, while some schools are attempting to bring career-themed learning into the school and classroom, progress is limited. Moreover, even in schools where there has been enthusiasm for rethinking traditional academic strategies, continuing progress in implementation appears to have stalled.

While there is great variety across the regions in acceptance of contextualized and career-themed learning as a means for change, three rough approaches can be discerned:

The first are those schools designated as CAM developmental sites. In some of these schools, there is significant progress in developing classes in career majors and clearly increased learning opportunities for students in these fields. Some schools also have developed close connections with post-secondary institutions or employers in career target areas, and here, curriculum has been developed collaboratively, project-based learning is built into classes, and the traditional lines between academic and career-focused learning have softened, if not disappeared.

However, even in the most advanced schools, career themes are seldom integrated in the academic core of English, social studies, math, and science, but rather remain limited to specialized classes. Moreover, in some of the most impressive schools, contextualized learning opportunities are limited to students participating in designated classes and have not extended to the student body as a whole.

The limitations in progress at CAM developmental sites are in part due simply to the difficulty of the task of changing schools, as well as to limitations of time and resources. However, school officials in several regions believe that the movement toward career-themed learning has stalled, with at least one principal describing himself as “stepping back” from the initial vision. Reasons cited for the break in momentum include a lack of clear direction and priority from the State, a lack of adequate resources, and the “competing” priority of CIM implementation.

Stalled progress in CAM developmental sites is particularly notable in light of the apparent success some schools have had in developing productive classes, gaining support from students, parents and teachers, and forging links with the business community. The difficulty in encouraging this vision of learning within, much less beyond, individual schools raises questions about the State’s initial strategy for CAM development, which was based on creating prototype sites to serve as the basis for replication by all other schools.

A second, more limited approach, is found in schools where a principal believes that career-themed and contextualized learning provide the best foundation for developing a school wide educational strategy. In contrast to the experience of the CAM developmental sites, several principals across the regions have enthusiastically embarked on the task of organizing schools in substantial accord with the initial vision. These schools, few in number and generally in early stages of development, represent a different kind of model for replication, in that they are based on the individual educational philosophy of the principal. The potential for these principals to communicate their enthusiasm and approach to contextualized learning *as a way to learn* to their peers may prove to be a more effective method of extending the State’s initial vision than the experience of the funded prototype sites.

A third approach is found in schools with little or no emphasis on new contextualized learning. Some of these schools have not developed career majors. Others have developed CAM strands through redefining or regrouping existing courses. In view of limited progress in creating career majors in these schools, it is not surprising that the majority of all schools visited in the regions place little or no emphasis on integrating career themes in academic core courses.

Outside schools, there is a greater emphasis on linking academic and career learning, with a number of alternative programs developing workplace-based curricula. In one region, for example, teachers and employers have developed a curriculum delivered at the workplace, and measured through achievement of agreed-upon competencies.

In discussions about contextualized learning with superintendents, principals, and teachers, several points are consistently raised as barriers. First, and most significant, is the perceived conflict between achievement of academic standards (as reflected in the State mandate for the CIM), and the resources and effort required to implement a contextualized learning strategy. As discussed above, these are not seen as elements of the same long-term strategy but, instead, as separate, if not warring, priorities.

Second is the very widespread confusion over the direction and shape of the CAM. At this point, most superintendents and principals interviewed see the CAM as primarily emphasizing higher academic standards, with relatively little focus on experiential learning. However, local education officials are nearly unanimous in describing the CAM message as “confusing” and subject to frequent change.

Third, as frequently noted in teacher focus groups, as well as in discussions with principals, is the continuing distinction between academic and professional/technical education, accompanied by resistance to integration among academic teachers.

Fourth is the lack of opportunity for professional development. Virtually all superintendents, principals, and teachers interviewed recognize professional development as the most important factor in promoting career-themed learning. Education officials agree that professional development efforts could overcome many of the barriers discussed above, and the focus groups showed strong enthusiasm for contextualized and career-themed learning among teachers who had participated in professional development initiatives. At the same time, superintendents and principals are nearly unanimous in noting that current resources for professional development are not nearly adequate to meet the need.

4) There has been significant progress in developing work-based learning opportunities but limited connections back to schools

Development of work-based learning opportunities has been the primary focus of school-to-work initiatives in the regions visited. Most regions have developed a relatively large number of employer contacts, provide a range of work-based learning opportunities, and are developing an infrastructure for employer contacts that includes community or regional coordinators and a regional data system. (Mathematica noted similar progress on this issue in their report, remarking that “Oregon’s partnerships already display a remarkable array of options that engage students in meaningful learning experiences.”⁹) Oregon’s success in developing significant connections to the employer community is unique among states, as many are struggling with this aspect of their STW initiatives. This success is likely attributable to Oregon’s decision to implement STW through the workforce development system and, specifically, through the RWQCs.

Although few, if any, communities now provide all students with a work-based learning experience, the numbers of those students who are participating -- particularly in less intensive experiences, such as field visits and job shadows -- are impressive. Some regions even report that there are more employer internships available than students to fill them. Regions are also developing a number of work-based teacher internships, with at least one region declaring a “year of the teacher” that emphasizes on-site experiences for teachers. Given the central role of teachers, this approach may prove to be a more effective catalyst for change.

Despite the current plethora of opportunities, however, there is concern in several regions over the issue of scale. Larger cities and communities, seriously considering the “all students” question, are doubtful they can offer all, or even most, students a comprehensive work-based experience, such as an internship. There is also some question about the potential to serve all students with less intensive experiential opportunities, like job shadows. Also, some employers, including one of Oregon’s largest, are beginning to question their capacities to continue to provide on-site learning opportunities for students. One company representative, committed to school-to-work, described a shift in strategy away from providing student work-based experiences toward an increased emphasis on teacher internships and project-based learning in schools.

⁹ Mathematica Policy Research, p. 14.

Another major issue is the separation of work-based learning activities from the classroom. In most regions, work-based learning is seen as a distinct and limited activity with little or no connection to ongoing classes or learning apart from classes in general employability skills.

There are three significant exceptions to this trend: CAM developmental sites where work-based learning is often an integral part of classroom experience; some middle school programs that build field visits and job shadows into an overall career-themed curriculum; and alternative programs that traditionally make a greater effort to incorporate work-based learning. Several alternative programs have created an educational component specifically to complement student work experience.

5) There are unrealized opportunities for transitional pathways

Schools and alternative programs have, of course, developed a number of transitional pathways -- from elementary to middle to high schools, and from high schools to higher education, post-secondary training, and career employment -- prior to the State's school-to-work initiative.

Our finding is that few, if any, of the regions have used the opportunity provided by the school-to-work initiative to build on this foundation. This is surprising, given the potential for joint efforts.

School-to-work initiatives are conducive to partnerships between schools built around career themes. For example, schools can jointly participate in project-based learning activities, or middle schools can develop introductory programs linked to high school career majors. Although there is some evidence of each kind of partnership, the majority of schools visited have not realized the potential of using school-to-work themes or projects as a basis for joint activities. Many principals did note that they would like to create these kinds of connections.

Potential opportunities for developing transitions beyond high school have not been realized. Most regions have not made expanding existing 2+2 or Tech-Prep programs a priority in their school-to-work strategies, although these kinds of initiatives offer a natural foundation for career related pathways. This potential is evident in some CAM developmental sites where participating students will likely be able to take advantage of a near seamless link to career-related post-secondary courses and, subsequently, benefit from community college connections to area employers.

Examples of pathways to two-year colleges, while limited, greatly outweigh evidence of pathways to four-year institutions. Although the national vision for STW places school-to-college on an equal footing with other pathways into the workforce, this emphasis is nowhere evident in regional strategies. Most regional strategies seemingly ignore four-year colleges as an option, while a number of schools visited drew a clear line between school-to-work and “college-bound” programs.

Post-secondary connections for students in *alternative programs* are even more restricted. GED programs, even those operated on community college campuses, are generally designed to terminate with the degree and possible connection to an entry-level job. Although GED programs can be transformed to provide preparation and connection to post-secondary education, in most regions, there has been no attention given to making these programs a platform for the same kind of 2+2 connections found in many schools and in some CAM developmental sites. There are also no apparent connections to four-year colleges for this population.

One exception to this overall finding is in Region 2, where a community college is beginning to rethink its traditional approach to alternative programming in favor of creating defined pathways to post-secondary education.

Connections to career employment opportunities are also limited. In some CAM developmental sites, employer involvement in schools can lead to continuing employment options for participating students. Some school-to-work programs have also been successful in developing internship or apprenticeship efforts, with one program in Region 10 providing as much as 1500 hours of paid apprenticeship training in 13 different fields. Alternative programs, given their flexibility, have particular promise in this area, offering the opportunity to work with employers to integrate academic and career learning. Despite this potential, however, there remain relatively few apprenticeship or career internship programs in the regions visited.

Element Two: Integration of Related Institutions, Programs and Resources

The long-term success of Oregon’s school-to-work strategy depends on a systemic approach that links education, training and related institutions, programs, and resources in a single framework. The assessment examines three key objectives that must be met if Oregon is to effectively integrate STW into its comprehensive education improvement agenda:

Objectives:

1) *Integration of educational initiatives*, including interrelated reforms, such as CIM, CAM, PREP, PASS, Goals 2000, and consolidated school improvement plans;

2) *Integration of related funding streams and resources*, including education resources, such as Title I and Carl Perkins; training resources, such as JTPA ; and economic development resources;

3) *Integration among institutions*, including schools, community colleges, alternative providers, Private Industry Councils, social service agencies, and employers.

Findings:

1) STW is seen as separate from Oregon's principal education improvement initiatives

Oregon's initial vision of STW was as an educational reform strategy, a "way of learning" that would promote improvements in academic achievement, and could then be measured by new standards and benchmarks. The assessment found that, while the emphasis on standards and benchmarks remains, STW is not seen as a central element of the education reform platform in the regions visited. Rather, STW is viewed largely as a program to provide work experience for students outside schools and is seen by most of those interviewed as separate and distinct from the CIM/PASS/CAM education reform agenda. In contrast to Oregon's initial vision of STW as the vehicle for achieving these educational reforms, the initiative is better characterized, as one teacher put it, as "a program off to the side, trying to get in."

In most regions, STW strategies are not perceived as part of school improvement initiatives. School superintendents and principals have emphasized CIM, and to some extent PASS and Goals 2000, as the focus of education reform. School officials see these initiatives, all emphasizing higher academic standards, as related components of a larger state agenda for school improvement. Although there is a great deal of confusion over CAM, it is also viewed as a part of this agenda.

Most school officials interviewed attribute the limited role of STW in school improvement strategies to a lack of state priority and an unclear message as to where STW fits relative to the

CIM and CAM. Superintendents and principals in all regions see little priority for STW relative to other education initiatives coming from the State and their local school boards, and, equally, little attempt to present STW as an integral part of the State's standards-based school improvement message. To support this point, a number of officials note the minimal emphasis on STW in the State's school improvement plans.

2) There is unrealized potential to integrate funding streams

With federal funding limited, continued support for STW requires regions, communities, and schools to "assure that funds are coordinated and leveraged with other resources in a manner which allows the best possible programming with the least duplication of services."¹⁰

Most OWO regions have taken the first limited steps toward meeting this goal. As part of the OWO effort, RWQCs have examined the use of a number of related funding streams including Adult Basic Education, JTPA 8%, Carl Perkins, Wagner-Peyser, and School-to-Work resources. Each of the OWO regions has developed a plan that in some way identifies the current use of these particular funding streams. Some regions have employed these plans to point out opportunities for funding integration, while others have moved to connect some funding streams: one region, for example, linked 8% and school-to-work funds to support alternative programming.

These kinds of connections, however, are few, and are generally a result of the planning process undertaken through the OWO initiative. Without the OWO effort, it was not apparent that regional officials and staff responsible for STW are knowledgeable about the range of opportunities available for funding integration. More significantly, it was not clear that OWO regions would actually achieve funding integration in support of STW, particularly in those regions where STW funds will expire in the summer of 1997. It was also found that the regions visited have ignored the larger potential of other related funding streams, such as JTPA II B and C, Title I education funding, and state education funding (known as ADM). Each of these resource streams can support STW efforts:

JTPA IIB has always been used to support summer jobs for disadvantaged youth in the public and non-profit sectors. Although these programs do provide experiential learning opportunities, as a stand-alone program, IIB funding can likely be better used to provide private sector summer internships that are linked to a year-around STW effort. Creation of private sector internships is

10 Oregon STW Application For Federal Assistance, p. 20.

both a key element of the State's STW vision and one of the needs most frequently expressed by employers in the regions visited.

Title I, the federal government's largest education program for disadvantaged youth, is also, at over \$ 70 million, one of the largest potential resource pools in Oregon for school-to-work programs. Oregon's STW vision can provide a framework for Title I-funded schoolwide strategies in eligible schools or for programs directed at eligible students. Title I resources can fund STW needs identified in all regions, including professional development, curriculum development, and work-based learning opportunities.

For alternative students, *State education funding (ADM)*, up to \$4200 per student per year, now used primarily for traditional GED programs, can be used to support out-of-school and alternative youth in comprehensive STW strategies. These resources can, for example, support community colleges in developing career-themed 2+2 programs for out-of-school youth.

3) There are good connections with employers, but other institutional connections are weak

An effective school-to-work strategy must extend beyond schools to include the private sector and related institutions -- community colleges, Private Industry Councils, four-year colleges, and alternative providers.

The regions visited have successfully recruited *employers*. Employers have shown interest in working with schools and regional STW bodies to provide a variety of work-based learning opportunities, including paid internships for students and teachers. These experiences, however, have generally not resulted in changes in classroom curriculum, although there appears to be enthusiasm among both employers and some teachers to connect work experiences back to the school.

Regions visited have had less success with *community colleges*. It was initially anticipated that community colleges would work closely with schools in CAM development and in creating "a seamless K-14 pathway." In some regions, there continue to be good linkages between schools and community colleges around previously funded CAM developmental sites. There is little expansion, however, and in many, if not most, regions visited, community colleges are not playing an extensive role in curriculum development in career major areas or in expanding established Tech-Prep programs to build pathways between secondary and post-secondary

education. In a surprising number of regions, there are also reported operational difficulties between schools and community colleges, with mid-level officials on both sides noting political, institutional, and regulatory barriers.

Private Industry Council (PIC) involvement is mixed, with some PICs in the regions visited active in the RWQC and supportive of STW activities, and others viewing STW programs as competitors to long-established JTPA-funded activities. In general, PICs seemed more involved in working with school systems and STW bodies in rethinking out-of-school programming than in looking at employment and training programs aimed at the in-school, disadvantaged, at-risk population.

Higher education institutions are almost entirely absent from STW planning and programs in the regions visited.

Alternative providers have a long tradition of connecting students to work opportunities. Regional school-to-work strategies aimed at promoting such innovations as career-themed curricula or new connections to post-secondary training generally have not incorporated alternative providers. Alternative providers have, however, been linked to additional work experience opportunities as a result of STW initiatives.

Element Three: Inclusion of All Students

Oregon's initial vision was for an STW system based on three principles: that student need drive the system, that system entry be mandatory for all students, and that all students achieve the same high standards of performance. The assessment examines two key objectives necessary for creating this kind of system:

Objectives:

- 1) *Create a common approach to education in school* that eliminates distinctions between academic and vocational and/or college and non-college-bound, and that serves all students;
- 2) *Infuse STW principles in alternative programs*, including programs for out-of-school youth, youth in the criminal justice system, and youth in other non-school settings.

Findings:

1) STW is seen as an initiative for some, not all

Despite a goal of developing a single framework for all youth -- comprising CIM, CAM, and STW activities -- many, if not most, schools continue to make a distinction between college and non-college-bound youth. These distinctions tend to extend to school-to-work initiatives. In some CAM developmental sites, for example, lower-achieving students do not participate in CAM classes offering advanced skills training and contextualized learning aimed, at least in part, at the “college-bound.” In these schools, lower-achieving students participate in other STW related programs providing general employability skills. In other schools, the curriculum for “college-bound” students is little influenced by STW, while “non-college-bound” students participate in employability development and work-based learning opportunities.

Students and teachers in special education are generally served through separate programs, and teachers are not included in regional professional development efforts for STW. For example, although the Vocational Rehabilitation Division of the Department of Human Resources has established an impressive STW initiative to serve students with disabilities (the Youth Transition Project), this effort often was not linked with RWQC sponsored STW efforts. The assessment did find an exemplary STW initiative, targeted to special education students, that had served as the model for all the school’s STW activities as it combined special education and general students under an overall STW framework. This effort was funded with outside resources for one year; however, local resources were not provided to continue the combined effort once the outside funds ended. The school currently serves special education students under their own program framework.

Again, those schools where principals have established the STW framework as the driving force for schoolwide improvement are notable exceptions to this finding.

2) Alternative programs incorporate some, not all, STW elements

More flexible and career focused than schools, alternative programs provide a good base for STW initiatives. Alternative programs have always embodied some element of comprehensive workforce preparation, including employability development and work experience, and they are seemingly well positioned to incorporate the components described above in a comprehensive strategy.

Despite these advantages, most alternative providers in the regions visited generally offer traditional work-based experiences for participants, rather than the level of workforce preparation found in CAM developmental sites or in those schools that have embraced the STW vision. Few alternative programs, for example, are now setting CIM, CAM, or PASS standards for program participants. Similarly, few programs extend their curriculum beyond general workplace readiness to embrace a broader awareness of career opportunities for participants who will likely be entering the workforce upon program conclusion. (Mathematica's assessment of Oregon's progress in implementing STW came to a similar conclusion on this matter, finding that, "in particular, out-of-school youth are a continuing challenge to STW system implementation."¹¹)

There are several alternative providers that have taken advantage of a strong work-based learning component to develop a linked academic program that features contextualized learning. An apparently larger number of alternative providers in the regions visited, however, have not taken advantage of the flexibility inherent in their programs to integrate academic and work-based learning.

The most serious exclusion of alternative students is in the area of transition to post-secondary education and career employment. Although at least one alternative program provides paid apprenticeships, with others offering connections to employers and, in one case, to community college, most providers in the regions visited emphasize a GED certificate and connection to entry-level jobs. This is an example of unrealized opportunity. Alternative providers, particularly those funded with ADM dollars, have both the flexibility and financial resources to develop more extensive workforce preparation for students outside the school system. As noted earlier, alternative providers, in partnership with community colleges, can transform traditional GED programs into a base for 2+2 initiatives aimed at out-of-school students. The community college in one region is currently exploring redirecting its traditional GED programs toward this model. Alternative providers can also partner with business to create customized training or even apprenticeship programs that incorporate academic and work-based learning. Alternative programs in two regions visited have adopted this strategy.

Aside from the efforts of one region, the assessment did not find strong connections between alternative providers and the RWQC-sponsored STW initiative. Although some of the alternative providers were aware of the STW effort, in general, most were not participants in the planning and implementation activities. For example, a local, federally funded Job Corps

¹¹ Mathematica Policy Research, Inc., p. 17.

Center, which has been a three-year recipient of national school-to-work funds from the U.S. Department of Labor and the U.S. National School-to-Work Office and is now working with a local school district, reported not being involved in the region's overall STW implementation initiative.

III. JTPA 8% and RWQCs Contributions to STW

As indicated earlier, the assessment examined the contribution of two specific elements to the implementation of a statewide STW initiative. The study focuses on the role of JTPA 8% funds because the State has required that local JTPA organizations use their 8% funds to help connect disadvantaged youth with STW activities. The State JTPA administration supported this assessment for that reason.

Assessing the role of RWQCs in STW development was a direct result of their policy and administrative responsibility for implementing STW at the regional and local level. Each of the 15 RWQCs were selected by the State to serve as the local partnership entity required by federal law to implement the STW initiative. Each received a three-year implementation grant from the State STW office to advance local STW activities. The State Workforce Quality Council supported this element of the assessment because of its role in fostering the development of regional workforce committees and its interest in understanding how effective RWQCs have been in carrying out their STW responsibilities.

Use of JTPA 8% Funds

As with other JTPA programs, 8% funded initiatives have generally offered work experience and employability skills as major components of program design. With the development of Oregon's school-to-work strategy, the vision of state planners was that this base should be adapted or enhanced to promote the broader state vision described at the beginning of this report. In other words, 8% funded programs should support, directly or indirectly, high academic standards; infusion of career themes; contextualized learning; and connection to post-secondary education and training. In addition, 8% funding should not be expended for stand-alone efforts but as a complementary element of a larger school-to-career strategy. These goals are the foundation for our assessment of these programs.

The assessment examined use of 8% funding within eight regions. The assessment examines two key objectives:

Objectives:

1) Use of 8% funding to support STW principles through infusing these principles in 8%

programs or connecting participants to the larger system;

2) *Use of 8% funding for a systemic approach* that integrates resources and programs in a comprehensive STW system.

Findings:

Findings are similar to those for alternative programs, with 8% funding providing limited benefits to participants and limited connection to the larger system.

1) 8% funded programs promote some, not all, STW principles

Like other alternative programs targeted to a similar population, 8% programs have traditionally emphasized work experience and employability development, and these continue to be the prime focus of program models. Although these programs are explicitly targeted to economically (and frequently academically) disadvantaged students, few seek to provide participants with the broader level of academic and other supports ultimately needed to succeed in the workplace. Some programs incorporate tutoring or other academic assistance; most, however, show little emphasis on promoting high academic standards. Although 8% programs generally target students who will have difficulty meeting CIM standards, few have taken advantage of flexibility in use of this funding to adopt this as a program goal.

Some 8% programs in regions visited do focus on a particular career theme, such as natural resources. Programs do not, however, appear to offer students broad awareness of career and educational opportunities, either in or outside the region. Although work-focused, most 8% programs have not incorporated contextualized learning.

As with alternative programs generally, 8% programs place very little emphasis on transition to post-secondary education or career employment. National evidence suggests that, while a GED is an important motivational tool for program participants, in and of itself, it is not enough to promote economic self-sufficiency. Given the tendency of many students to drift in and out of the labor force for some years before seeking post-secondary education or training, it is good policy, where possible, to use funded programs to make a direct connection to post-secondary training.

2) 8% resources are not used to connect students to the larger system

One clear option for 8% resources, limited as they are, is to integrate these dollars with related funding sources to expand the opportunities for students. One option here, for example, is to link 8% and ADM funding to support community college or preparation programs, or alternatively, to fund the kind of paid internships noted earlier. Some regions have, in fact, linked 8%, ADM, and IIC funding in program efforts aimed at economically and academically disadvantaged students. However, these resources, while representing an innovative funding approach, tend to support traditional GED or work experience focused programs.

One disturbing finding in some regions is that 8% resources are used to isolate students rather than to connect them to the larger system. In these regions, schools with successful school-to-work programs establish separate 8% funded school-to-work efforts targeted specifically to lower achieving students. As noted by the principal of one of the most successful schools visited: “[Students in 8% programs] didn’t have the higher-level thinking skills to succeed” in the overall school program. Use of 8% resources to fund separate (and lesser) programs for some students, rather than to help them succeed in a challenging environment is precisely the opposite of the intent of the school-to-work initiative.

In some regions, though a minority, 8% funding has been viewed not as a stand-alone program but as a support to aid students in achieving one or more elements of the State vision. One region, for example, used 8% dollars to help disconnected in-school students achieve school academic standards through providing counseling, tutoring, and other support services. Generally, however program operators continue to view 8% funded programs as separately planned and operated interventions, not linked to other objectives or components of a school-to-work strategy.

3) 8% resources are too small to make a difference

Cuts in JTPA have meant that in most regions visited, 8% funding is less than \$50,000. By itself, this sum is too small to support an effective school-to-work approach. These dollars can, however, be combined with other funding streams as described above, or they can be used to help develop or support a more comprehensive strategy aimed at the economically disadvantaged population.

Effectiveness of RWQC Efforts

The assessment examined STW activities within eight RWQCs. The study identified three objectives to characterize the effectiveness of RWQCs in STW implementation.

Objectives:

- 1) *Existence of a shared and comprehensive regional vision* for STW as a foundation for education improvement among educators, employers, workforce development officials, and other key interests in local communities;
- 2) *Integration of relevant resources and linkage* among education and workforce development partners to implement the STW vision and strategy; and
- 3) *Development of professional capacity* to manage, monitor, and sustain the STW initiative.

Findings:

The assessment found significant variance among RWQCs in their efforts to implement STW. In at least one region, the RWQC has played an active and effective role in carrying out most of its STW implementation responsibilities. In other regions, however, RWQCs have taken a very minimalist approach to STW, delegating implementation responsibility to a steering committee or a local administrative entity, with limited involvement of the RWQC board.

Four key findings characterize the role of RWQCs in STW:

1) Limited shared vision

All regions have built an understanding about and commitment to STW among employers. Most regions have focused the majority of their time and resources working to involve the business community in STW. These efforts are already paying dividends through the substantial number of work-based opportunities created for students and teachers. In at least one region, the business community is a driving force for STW and overall school improvement efforts.

Some RWQCs have also been successful in building a shared vision with the local JTPA organization. In several regions, the two groups are working closely to further the STW agenda, and one region is on the path to merging their JTPA and RWQC groups into a single entity. These successes, however, are evident only in a few regions, as most others still have not

developed close working relationships with the local JTPA group.

There is minimal success in reaching other key partners. Most notably absent in most RWQCs is the K-12 education community. Most educators interviewed are skeptical about the role of RWQC in education matters. Educators note that they already have to report to a policy and financial oversight body (i.e., school boards) and do not believe it is viable to have another oversight body on top of that, particularly because they view RWQCs as having very little knowledge and experience with educational issues.

Even in the one region where the RWQC exercised its perceived authority to engage the education community in STW and education improvement, there is tension between educators and RWQC board members, particularly those representing the private sector. Some educators do not accept the legitimacy of the RWQC to concern itself with issues surrounding education improvement. Most of those interviewed at the local level noted that the leadership of the State ODE did not support the role of the RWQCs.

Most regions also have not developed viable partnerships with other key players, such as economic development organizations, community-based groups, and higher education. One result is a lack of emphasis on the linkage between education and workforce development with economic development. In most places, there is little evidence that STW plans and activities are being driven or even influenced by local labor market and economic development needs. This result is particularly unfortunate, as Oregon's businesses have continually stressed the need for a better, trained workforce to sustain the State's recent economic growth, particularly in several key industry sectors.

Overall, most RWQCs have yet to position themselves as leaders and key advocates for STW or education improvement in their communities, as was initially envisioned in the State's STW implementation strategy. In some instances, this is a result of RWQCs distancing themselves from STW. Clearly, all RWQCs have significant work to do in forging a more cohesive vision and alliances among all relevant partners, especially the education community.

2) Minimal success in using STW as a catalyst to integrate resources and institutions

As noted earlier, this study focused on the five RWQCs participating in Oregon's workforce option initiative. One expectation was that these regions would have made significant progress in developing viable plans for connecting program resources that could be used to further the

region's STW initiative. To date, however, this has not been the case; the local planning processes have yet to lead to significant agreements of how funds will be integrated to support STW. It is unclear at this point that regions will be able to realize these efforts prior to expiration of STW implementation funds.

Regions conceptually endorse the idea of leverage and acknowledge the need to accelerate the integration of additional resources to further the STW agenda, particular, as federal STW funds diminish. A major barrier to this is RWQC board members' lack of understanding of such possibilities. Few of those interviewed understand the panoply of programs supporting education and training activities in their communities, and the possible use of those resources for STW. Thus, RWQC board members are not in a position to effectively advocate for such integration. Similarly, most regions do not have sufficient staff capacity to have full knowledge of the range of education and training programs. Without knowledgeable board members and staff, regions have limited capacities for effectively advancing integration opportunities. Finally, it does not appear that state officials have taken a proactive role in advocating resource integration around STW, except as it applies under the OWO initiative.

3) There has been progress in developing work-based opportunities; however, other areas largely are unaddressed

As noted earlier, regions have given considerable attention to building linkages with the employer community and have successfully generated a large number of substantial work-based opportunities for students. In a number of places, these efforts have also resulted in work-based opportunities for teachers, such as summer internships in local businesses, helping to establish an important foundation for STW among the employers in most communities. In many instances, this success is likely attributable to employer recognition of RWQCs as legitimate workforce development bodies in their communities.

RWQCs have not, however, devoted comparable attention to other important STW elements, such as the development of career majors in schools and the infusion of contextualized learning into all classrooms. The challenge for most regions today is to sustain the interest and commitment of the employer community, while advancing the cause of STW within the school. In several regions, businesses are becoming frustrated and skeptical of STW because there are insufficient numbers of students and teachers to take advantage of their offers for job shadows, internships, etc. At least one RWQC openly acknowledged this issue and has taken specific action to address it as part of the annual STW work plan.

An important issue for RWQCs in taking a more proactive role in advancing the cause of STW within the school is the connection with the education community. Without a shared vision of STW with local educators, RWQCs will likely encounter difficulty executing any strategies designed to address these matters. Furthermore, RWQCs will need significant support from the State, as well. At a minimum, the State needs to publicly reinforce its decision of several years ago that effectively authorized the RWQCs to conduct activities and expend resources that affect the ways that students are taught within the classroom.

4) Uncertain future for sustaining effort and potential loss of business involvement

Oregon's RWQCs are relatively new; they were created five years ago. During that time, they have transitioned from a group principally focused on distributing discretionary workforce development resources for projects to a group with little program resources, and ambiguous responsibilities and authority for regional workforce development policy. Many of the RWQC board members and staff are just as confused about their mission as are others engaged in community workforce development activities.

This confusion has appeared to influence the RWQCs in fulfilling their STW responsibilities. With several exceptions, most RWQCs have taken a hands-off approach to implementing their STW grant and, thus, are not currently well positioned to address the issue of sustaining the STW initiative over the longer term, particularly as federal support ends over the next couple of years (five regions finish their federal STW grants effective August 31, 1997). Even where RWQCs have taken a proactive role in STW, sustainability is an issue that presents many challenges. Front and central is the ability of the RWQC to influence the use of other resources to further the STW agenda. Without a clear mandate for such action and acceptance by the local education community, as well as backing from the State, RWQCs may be hard pressed to maintain an active role in STW.¹²

Some schools may not be deterred from continuing their STW and education improvement efforts, but the absence of RWQCs may possibly lead to disintegration of substantial employer involvement in STW around the State. In many places, STW is seen as the key catalyst for linking business with education improvement. Some businesses are already experiencing frustration with the effort, as they see student and teacher work-based opportunities unused.

¹² One region, in Spring 1997, announced plans to allocate local education funds to maintain its STW implementation effort after federal funds end.

IV. Overall Themes and Recommendations

Achieving systemic education improvement is challenging work. Although Oregon schools and regions have made progress on a number of fronts, much needs to be done if Oregon is going to realize its vision of education improvement and do it in a way that takes advantage of the opportunities presented by the STW initiative. At this time, however, it appears that Oregon's future for institutionalizing its statewide STW vision is uncertain, particularly if major steps are not taken to refocus the STW implementation effort and make it a more integral part of education improvement.

It is important to point out that this assessment is not the only to raise this concern. The Conkling, Fiskum, and McCormick marketing and communications plan for STW, published in 1995, noted that "many schools remain unprepared to mount a full-scale STW effort for all their students. They have not addressed curriculum changes ... and they have not prepared the entire sales force -- teachers, administrators, students, custodians, secretaries, school boards, parent groups, site councils -- to support the effort."¹³

Two other recent studies noted challenges to effectively implementing important aspects of Oregon's education reform agenda. Mathematica's 1996 assessment of Oregon's progress in implementing STW concluded that "supportive stated legislation and an effective partnership of business, education, and state government have created a road map with potential for fulfilling the STW mandate of a coherent STW system. However, to achieve that lofty goal, the State and local partnerships must still resolve some challenges."¹⁴ Many of the Mathematica identified challenges were similar to those noted in this assessment.

Similarly, an evaluation by Management Analysis and Planning Associates (MAP) of the Oregon Department of Education's efforts to implement the State's ambitious school reform legislation concluded "a mid-course correction is in order to keep the reform effort on track."¹⁵ The study also found that "it is unclear how content standards and statewide assessments, in the

13 Conkling, Fiskum and McCormick, *School-to-Work Marketing and Communications Plan: Report and Recommendations for 1995-1996*, State of Oregon, June 30, 1995, p. 31.

14 MPR Associates, Inc., p. 16.

15 Management Analysis and Planning Associates, L.L.C., *To Lead Education Reform: An Appraisal of the Oregon Department of Education*, Oregon Secretary of State, Audits Divisions, April 28, 1997, p. 1.

absence of additional leadership from the department, will result in the changes in curriculum and instruction at local schools necessary to produce student outcomes promised by the education reform act.”¹⁶

Finally, a recent report from the Governor’s Task Force on School Improvement notes that “despite the gains we have made, the magnitude of what needs to be done exceeds previous expectations.” The report advocates for “assigning a much higher organizational and budget priority to school transformation” and calls for increasing the “scope, intensity, and organization at both the State and local levels” to achieve success.¹⁷

The overall conclusion of this assessment is that the State needs to revisit its STW initiative and do so in the context of its agenda for education improvement. Doing this, however, does not denigrate the hard work and successful projects around the State, nor the promise for real education transformation found in some places. It does, however, raise important questions about the level of effort needed at the federal, state, and regional levels to effectively achieve the types of systemic changes called for by the STW initiative, particularly if such changes are to occur on a statewide basis for all students.

Many of those interviewed expressed doubts as to whether the federal STW program has adequate funding and a sufficient time-frame to achieve its national mission, particularly given that it could not fully fund Oregon’s proposed STW efforts (\$18 million out of a request for \$35 million). Given the current status of Oregon’s implementation efforts, these doubts seemed warranted. Simply put, changing long-standing institutions and systems requires money and time, and, perhaps, more of each than was allotted for this effort. Equally important, however, is the issue of whether State and regional leadership were fully prepared and equipped to effectively carry out the authorities and responsibilities under the STW initiative. This assessment identifies a number of points where such efforts could be strengthened.

Unfortunately, there are no states that have achieved this goal and that, thus, could provide lessons or models of what to do. Oregon must chart its own course in considering the significance of these findings and determining the most appropriate next steps. The next section identifies those issues or themes that appeared to influence success across the State. It is

16 Ibid. p. 84.

17 Governor’s Task Force on School Improvement, *Report on Oregon’s Progress in Implementing CIM and CAM Achievement Standards and Related Measures to Transform the K-12 School System*, October, 16, 1996.

followed by a set of general recommendations for improving State and RWQC efforts.

Overall Themes

The assessment focused on a number of specific elements important in the implementation of a statewide STW initiative. Although each has its own significance, four overall themes or issues cut across these individual elements and appear to influence STW implementation throughout the State. Without attention to these larger issues, it is unclear that more specific efforts will produce the kinds of systemic changes needed to realize the overall education improvement vision.

1) The need for clarity in the role of STW in education improvement

Legislative and personnel changes have altered the role of school-to-work in Oregon's educational improvement agenda. One strong finding of the assessment is that while there is a broad recognition that change has occurred in the education improvement vision, there is an equal if not greater level of confusion over what this change might mean and what role STW can or should play in Oregon's continuing efforts toward school improvement.

Some of this confusion is understandable, given the blurred boundaries of CIM, CAM, and STW. Overshadowing semantics, however, is a larger question raised by this study: Is State policy toward education improvement still predicated on the belief that academic and career learning together are necessary to prepare students for a productive adult life?

The results of this assessment make clear that few educators believe there is a State policy that actively promotes the five key principles discussed above -- high standards, career awareness, contextualized learning, work-based learning, and post-secondary transition -- as integral and related elements of school improvement.

Instead, there is prevailing confusion over State education policy and the ODE's message. Grouped under the nearly unanimous local belief that ODE is not delivering an integrated message are several overlapping opinion strands:

For all practical purposes, education improvement means implementing the CIM. For superintendents, principals, and teachers, the State's emphasis on the CIM and academic standards has drowned out any other message. Regardless of State intent, the effect is that STW,

in general, -- and connections between career and work and academics, in particular -- are relegated to a much lesser status.

The CAM emphasis on integrating work and learning is disappearing. The most prevalent views of the CAM are frustration and confusion at what is seen as a frequently changing message. To the extent there is a clear theme, it is that the State-promoted CAM has diminished its emphasis on career relative to academic standards. Few of those interviewed now see a CAM that matches the initial vision of contextualized learning in core subjects with a strong emphasis on work-based learning.

School-to-Work is shrinking. Once seen as a framework for educational improvement, STW is now largely defined by RWQCs, Superintendents, principals and teachers as work-based learning outside the school. This diminished definition has translated, naturally, into lesser priority at the school level and has given legitimacy to the idea that school-to-work can be for “some students,” the “non-college bound,” at-risk, etc.

Together, these local perceptions have undermined the initial broad vision of integrating education improvement and workforce development. To many, the message received from the State is increasingly the traditional one of academic standards taught through conventional methods and shorn of any real connection to career or workplace learning.

2) The need for stronger State leadership

Linked inextricably to local confusion over the State vision for education improvement is a strong perception that the State is not providing leadership to regions, communities, or schools in envisioning or implementing a school-to-work strategy.

This perception is felt in almost every aspect of the school-to-work initiative, beginning with the lack of any clear message. Local educators, community leaders, and employers, pointing to the “mandate” for CIM and PASS, noted the absence of any comparable direction or even advocacy for school-to-work. Although State officials may have viewed the lack of mandate as an opportunity for local control, the effect has apparently been to encourage inaction. This is evident in a number of findings:

Lack of coordinated State strategy: Implementation of school-to-work as planned requires a coordinated effort both within the ODE and between ODE, Economic Development,

Community Colleges and JTPA. There is little evidence of either intra- or inter-agency efforts to produce a unified plan of the kind advocated at the regional and local level. The absence of STW as a priority in State level planning sends a strong message both to regional bodies such as the RWQC (see below) and to local institutions like local community colleges, PICs and schools.

Lack of State direction for related initiatives: SIPs, Title I and JTPA are all potential components of a unified planning, program and resource strategy at the local level. In the long-term, realizing the potential of these resources is most likely essential for the continuation of a workforce development strategy for youth. Any effort of this kind, however, will require deliberate and concerted State action to overcome the resistance and inertia that almost always act to prevent change in longstanding programs.

Although STW principles would provide an ideal framework for directing each of the initiatives, relevant State departments have not set STW as a priority in planning or implementation. Without direction from above, these issues have not even been addressed at the local level. Thus in the regions visited, major potential resources, such as Title I and JTPA, have continued to be administered separately from STW, and the opportunity to use the SIP process as a tool to integrate career and work-based learning has not been realized.

Lack of priority for professional development to promote STW: One of the most persistent themes to emerge from our assessment is the need for professional development resources, and to a lesser extent, guidance in integrating academic and professional-technical education. There is, however, no comparable State priority in this area, either in making resources available for professional development or in suggesting that existing professional development resources be employed to support critical STW needs.

Insufficient State attention to implementation: STW as promoted in Oregon's initial vision and federal application represents change of a great magnitude in the way education and training institutions traditionally operate. The task is notoriously difficult to accomplish, with no national models for success. The State's effort to aid regions has been seen as helpful. However, our findings show that the technical assistance provided has not been sufficient to help local decisionmakers understand the current system, the role of component institutions, and the potential of the current resource base. There is a clear, unmet need for State-level assistance in these areas.

Together, these findings argue for a revised view of the State role. The Oregon model for

implementation was predicated on regions, communities, and schools having the vision, capacity and political support to put school-to-work in place. In practice, it is clear that this kind of “bottom-up” implementation will not occur except in isolated instances. The regions visited made clear the need for State “direction.” The success of STW will depend on the State’s willingness to set priorities; to put them in place for State programs and resources; and then to assist regions, communities, and schools in undergoing a similar process.

3) The need for clarity in the roles, responsibilities, and authorities of RWQCs

The challenges of implementing STW at the local level are considerable. Such challenges are only magnified and intensified when the key entity designated to direct the effort -- the RWQC -- is uncertain of its own role, responsibilities, and authority, and is surrounded by other education and workforce development groups that have little reason to accept the RWQC as a legitimate entity.

To date, RWQCs have made minimal progress in fulfilling their responsibilities to guide and oversee local policy issues concerning the emerging workforce. RWQCs in general do not engage in education issues or have strong ties to the education community. In fact, the greatest challenge currently confronting RWQCs in effectively implementing their STW programs is “getting school-to-work into the schools.”

It can be argued that the RWQC role in STW is very clear: it is their one programmatic responsibility. It must be remembered, however, that these are new organizations, which, during the last several years, have tried to change their operational responsibilities from primarily funding projects to overseeing workforce development policy, although they were charged with policy oversight responsibilities at their inception. Many, with good reason, believe that they have not been provided clear direction on how to carry out their policy role and, thus, rather than asserting their responsibility for STW and policy oversight, have tended to shy away from these activities.

Several RWQCs, however, have not let this uncertainty deter their desire to establish effective organizations that legitimately consider all aspects of workforce development policy within their regions. Even in these instances, RWQCs have experienced difficulties and tensions with other groups in the community, particularly education institutions. These situations have detracted from their focus on the workforce development needs and opportunities of local businesses and communities.

The situation is compounded when there is a general feeling that the leadership of the ODE is ambivalent, at best, about the existence and role of RWQCs in STW and education improvement. Without clear articulation from ODE leadership and the State Board of Education that RWQCs are a legitimate and important force for STW and education improvement in the State, it will be difficult for RWQCs to forge the needed alliances with local education communities.

4) The need for enhanced RWQC capacity

An ongoing issue for RWQCs is the commitment to staff capacity in addressing the complex issues of workforce development and STW. In the 1995 evaluation of Oregon's workforce development system, it was noted that RWQCs, in general, opted to use their resources for funding projects rather than staff. The study pointed out that action should be taken to insure that regions acquired adequate professional support and expertise.

Although the current assessment found that, in general, regions are now more attuned to the need for staff capacity, the degree of commitment is far short of what is needed. Addressing the variety of areas that encompass workforce development -- education, job training, welfare reform, and economic development -- requires extensive knowledge about the vast set of policies and resources that influence activities in these areas. One half-time or even full-time staff person for all of these issues seems woefully inadequate. Staff capacity is further stressed when responsibility for considering the policy implications of these issues is combined with responsibility for administering a three-year STW grant involving hundreds of thousands of dollars.

As noted in the 1995 evaluation, another element of staff capacity is the availability of technical assistance from the State. The findings on this issue are mixed. On the one hand, regions are pleased with the assistance received from State staff of the WQC and ODE. In particular, WQC staff are cited for their efforts to assist regions in the integrated planning process under the OWO. ODE staff are recognized for effectively addressing administrative grant matters relative to STW funds. On the other hand, regions indicate that the State has provided little assistance in thinking through or addressing the types of issues required for building a STW system at the local level. Many of the topics that surfaced during this assessment have never been fully considered by staff at the local level.

It is important to note that Oregon's federal STW application gave considerable attention to the need for staff capacity and technical assistance. The State identified a number of strategies and techniques for insuring that regions learned from each other and were effectively assisted by a variety of education and workforce development specialists within state government and from other sources. The assessment did not find much evidence that these intentions had been implemented.

Recommendations

A set of recommendations for strengthening STW implementation in Oregon follows. These recommendations are offered from the perspective that STW is an important resource for education improvement. As noted earlier, the objectives of STW are consistent with the underlying principles of Oregon's education improvement effort as represented by CIM and CAM: 1) higher standards, 2) career awareness, 3) contextualized learning and career majors, 4) work-based opportunities, and 5) transition to careers and advanced education. Evidence exists throughout the State that STW is important in each of these areas, although there is no one school system or school involved in STW that fully captures all of them.

Regional and Local Recommendations

The assessment identified a number of points at the regional and local levels that warrant attention if STW implementation is to be improved. As indicated earlier, this project also provided follow-up guidance and technical assistance to regions based on the findings of the assessment as the consultants worked with three regions during the period of January through March 1997. These efforts confirmed the assessment findings, as well as emphasizing the need for the regional and local STW leadership to reassess their approach to STW implementation. Actions warranting consideration include:

- **Make STW a RWQC priority (i.e., emerging workforce) and assert RWQC authority for engaging in education improvement matters**

RWQCs are charged with responsibility for guiding and overseeing the workforce development matters for three workforce groups: emerging, transitional, and current. To fulfill their obligations to the emerging workforce, particularly in the context of implementing STW, RWQCs must engage in substantive policy issues of education, as well as in significant

interactions with the local education community. The most important issue currently confronting RWQCs, as found through this assessment, is “getting school-to-work into the schools.” The need to address this situation was highlighted during the technical assistance visits where educators and businesspeople alike expressed willingness to forge stronger alliances to achieve STW goals and to do so using the RWQC as the key forum for action.

Steps regions can take to address this situation include:

- Reconstitute STW leadership so that educators -- especially superintendents and principals -- comprise a significant portion of the group.
 - Under reconstituted leadership, map out a regional vision and strategy for education improvement that acknowledges the role of STW and defines STW as an approach to education, rather than a set of work-based activities.
 - Undertake a specific communications plan designed to build a cohesive vision for education improvement and STW across the region.
 - Position the RWQC to play a role in the review of local school improvement plans, particularly to see that the needs of the emerging workforce and the principles of STW are reflected in such plans.
- **Reformulate regional implementation plans to better target STW efforts on meeting the education needs of school administrators, board members, site council participants, parents, and teachers**

With a reconstituted vision of STW and education improvement, regions can undertake and support a set of activities designed to transform local approaches to academic learning and career preparation. An important element of this effort, as emphasized during the technical assistance visits, is the need to show the connection between STW activities and education improvement initiatives. RWQCs should consider recasting their STW activities to address specific schools needs and do so in a way that engages both administrators and teachers, as well as board members, site council participants, parents, and businesspeople. Areas for possible attention include:

- Achieving the CIM;
- Achieving the CAM; and

- Improving alternative programs.

Achievement of the CIM represents an immediate opportunity for action. As discussed in several technical assistance meetings, superintendents and principals will soon be administering the CIM to all 10th graders. Current projections suggest that over fifty percent may not pass the test. What will schools do to better prepare students to master these standards? There are many strategies that might be deployed: practice taking tests; increasing teaching time in test subjects, such as math and English; or changing the approaches used for instruction.¹⁸

STW represents a different approach to instruction, one that blends academic rigor and relevance in ways that can make learning more meaningful and successful for students. The STW principles of career awareness/exploration, and contextualized learning can directly apply to student learning leading up to the CIM through such channels as 1) career classes; 2) career-themed instruction; 3) continuum-of-career experiences; 4) service learning; 5) individualized career portfolios; 6) project-based learning; and 7) integrated learning. Helping schools to see these opportunities and supporting their efforts to move in this direction can be an important step for a regional STW implementation effort.

Achievement of the CAM is another issue that all schools will eventually have to address. It is also an issue that has clear and direct connections to STW. Key STW principles related to the CAM include career majors, integrated work-based and academic learning, and transitions to college and careers. RWQCs seeking to work with educators on this issue can focus attention on such topics as: 1) endorsement strands; 2) thematic curricula; 3) specialized skills; 4) structured work-experiences linked to the classroom; 5) employer skills standards; and 6) articulated pathways to post-secondary and career opportunities.

Improving alternative programs may represent the least difficult way to incorporate STW principles into the education system, given the flexibility available in developing alternative opportunities. Important STW principles of high standards, integrated work-based and academic learning, and transitions to college and careers can be incorporated into the basic structure of many alternative programs without encountering many of the barriers found in the mainstream school system. Such efforts could involve an array of actions, including: 1) incorporating CIM and CAM requirements; 2) de-emphasizing GED as a primary goal; 3) linking to regional job

¹⁸ Based on the technical assistance meetings it did not appear that many local school districts or schools have developed plans for improving the number of students who would pass the CIM. This observation is similar to a MAP study finding that “ODE seems to have no contingency plan for this eventuality.” (pg. 43.)

training programs; 4) connecting structured work to defined competencies; and 5) developing articulated pathways to post-secondary and career opportunities. As a result of recent technical assistance, one region is now making efforts to transform its alternative programs in accordance with these principles.

- **Devote more resources and attention to acquiring necessary professional assistance to support the efforts of the RWQC and to improve RWQC board members' understanding of education as well as workforce development programs and resources**

To effectively fulfill their responsibilities for STW and other workforce development initiatives, RWQCs members must become masters of the complex issues that they seek to manage. Experienced and informed staff are key to this Goal, as is the ability to solicit objective information from workforce and education specialists in the community. Soliciting information, however, requires sufficient knowledge to know what to ask for. Without question, RWQCs need more staff capacity which could be achieved by: a) paying higher wages to current staff positions to attract more experienced and knowledgeable personnel; b) devoting more grant funds to personnel to increase the number of staff; and c) soliciting donated staff from local workforce and education agencies.

In addition, RWQCs must solicit assistance from the State. Whether requesting the assistance of ODE/STW staff or others in state government, RWQCs should develop an annual technical assistance plan that maps out their needs for assistance and expected outcomes from such assistance. This planning should be conducted at least annually by each RWQC, as well as by a collective group of RWQCs that can identify common technical assistance needs across the State.

- **Develop meaningful and realistic plans to sustain RWQC efforts at STW and education improvement after the conclusion of the federal STW grant**

Sustainability comprises two separate, although related, issues. First is the issue of sustaining the RWQC-sponsored infrastructure or capacity for fostering STW. The second is sustaining the ongoing transformation of education instruction integral to STW and education improvement.

The ending of federal financing of STW in five Oregon regions places an enormous burden on an initiative that has yet to fulfill its mission. There are no easy answers as to how these effort

can be continued, particularly with the financial impact of Measures 5 and 47. Nonetheless, as noted earlier, at least one region has decided to maintain its STW infrastructure largely through local education funds.

Opportunities for financing/sustaining education transformation activities are easily identified, but not easily realized. A number of potential resources -- Title 1, Goals 2000, JTPA, ADM¹⁹ -- have been mentioned. Opportunities also exist for redeploying or redefining the responsibilities for existing school personnel, such as work-experience coordinators and counselors. At least two regions are currently taking action to retrain and refocus the attention of these staff in ways that conform to the principals of STW.

➤ **Advocate for clear direction and support from the State on incorporating STW activities in education improvement, with a particular focus on how STW supports and connects with other education improvement initiatives**

Just as RWQCs need to develop technical assistance plans/requests for state assistance, it is important that they identify and collectively advocate for state action and support on a number of fronts. In many respects, their closest ally in such efforts should be school administrators, teachers, board members, parents, teachers, and businesspeople. Regional coalitions of these groups could represent powerful forces for advancing local/regional education improvement agendas.

The most important issue for regions at this time is the need to get clarity on the role of STW in the State's education improvement agenda. This action needs to be taken at the highest levels of state government which include the State Board of Education, the ODE and the newly formed School Transformation Advisory Council and its Implementation Team. Recent State Board of Education actions that a) acknowledge that STW is integral to comprehensive school improvement initiatives (October 1996) and b) replace a career- awareness credit requirement with career related learning standards (March 1997) represent good first steps. The fact, however, that such policy pronouncements come almost two-and-one-half years after start of the STW implementation initiative indicates that regions need to advocate for a stronger State role in leading the education improvement effort.

Action on these issues will not insure the success of STW or education improvement at the local level. Much work will still need to be accomplished by the local groups involved in improving

19 In the context of financing transformation efforts for alternative students.

the education and workforce development systems. Without such action, however, these local groups will have little ability to make significant progress, no matter how committed and effective their actions might be. Such actions will also likely lead to only modest progress without significant changes at the state level.

State Recommendations

Oregon's approach to implementing its federally funded STW initiative vested significant authority and responsibility in the regions and localities. Through this assessment, it has become apparent that such responsibility cannot be totally devolved. The State has clear responsibilities that must be asserted to both guide and assist localities in carrying out their activities. Specific recommendations on how the State can strengthen its efforts include:

- **Develop a single education improvement vision with a defined role for STW. The State vision should encompass CIM, CAM, STW, PASS, and PREP, re-emphasizing the role of STW as a tool to aid schools in achieving academic standards**

The experience of some schools suggests that incorporating STW principles as a “way to learn” can aid schools in achieving the higher education standards implicit in CIM, CAM, and other reform initiatives. This lesson, however, has largely been lost in the continuing evolution of the State's education reform strategy and the currently pervasive focus on CIM testing. With technical assistance visits reinforcing an impression of overall confusion over the role of STW in school reform, it is likely time for the State to both review its initial vision and its own role.

The ODE, in conjunction with the State Board and the School Transformation Advisory Council, should consider formally restating its overall position on education reform, through a single statement or policy that clearly articulates the connections between STW principles as a means of educating and engaging students and achievement of state mandated standards for CIM, CAM, PASS, and PREP. Local experience suggests that ODE should use this opportunity to diminish the emphasis on STW as a separate or stand-alone program, recasting it as explicitly as one element of a broader strategy. To encourage superintendents and principals to broaden their view of education reform, ODE's policy statement should lay out the specific STW elements that can contribute to achievement of CIM and CAM competencies.

For CIM, ODE should emphasize the importance of school focus on career awareness;

integration of career themes in academic core courses; and linkage of experiential learning opportunities to classroom learning. For CAM, ODE should emphasize endorsement strands that encompass academic core courses; strong connections between the classroom and structured work experiences; and development of articulated pathways to post-secondary education. To make these changes meaningful to superintendents, principals, and teachers, ODE will need to incorporate them both in the SIPs and throughout its continuing monitoring, technical assistance, and evaluation efforts. The State Board statement that STW is integral to school improvement efforts is a good foundation for continuing improvement in the SIP process. ODE should work to ensure that plans specifically address the issue of connections between school-to-work and CIM, CAM, PREP, and PASS. These connections should be reinforced through overall State guidance on SIPs and in individual school visits. ESD's can likely play an important role in working with schools to help promote and integrate STW principles through incorporating them into all relevant professional development (see also below).

➤ **Develop a state-level operational strategy that includes coordinated planning between agencies and integration of key programs and resources**

As Oregon's regions are seeking to sustain school-to-work efforts in the face of diminishing federal funding, key potential resources remain separate and disconnected. The State needs to consider two tasks: employing the education improvement agenda as a planning framework for individual funding streams and using this agenda as the basis for interagency planning.

The first task is to incorporate the education improvement agenda in federal and other funding streams outside the mainstream of education reform. SIPs now incorporate Title I programs, an important first step. However, as technical assistance efforts emphasized, Title I programs, often entrenched, are difficult to change, particularly without outside support. ODE and its Title I office can aid schools in transforming traditional remedial or pullout models by explicitly defining the State's broad education improvement principles as a basis for Title I planning. ODE and the State office should consider providing school districts with a vision for Title I-funded programs that includes achievement of high standards; contextualized and career-themed learning; and promotion of post-secondary connections and other key elements of the education reform agenda. This vision should be supported through adopting current professional development and technical assistance efforts, and it should be incorporated into school improvement and Title I plans.

A similar effort is required for JTPA. Although these dollars support programs that provide

important experiential opportunities, they seldom advance the full education improvement agenda. State JTPA planners need to incorporate the elements of this agenda in the State JTPA planning process, setting appropriate benchmarks or thresholds for such components as achievement of academic skills standards and promoting connections to post-secondary training. State planners should also specifically emphasize opportunities to incorporate JTPA-funded programs in regional school-to-work strategies through promoting the potential of private-sector internships and linking JTPA supported training to classroom learning.

Beyond ODE, other state agencies, such as community colleges, juvenile justice, and welfare have a vested interest in promoting the full education improvement agenda, including school-to-work principles. Agreement on standards -- PASS and PREP -- represents an important first step. But, to promote integration of resources at the local level, these agencies also have to develop a common vision at the State level that incorporates important elements of the education improvement agenda, such as extending academic standards and developing pathways to post-secondary education for all youth.

The second task requires the State to appoint a cross-agency task force to explore how all youth serving agencies and institutions can support the education improvement agenda. The agenda of this task force should include:

- A common vision and statement of principles for all youth-serving programs;
- The role each youth-serving agency can play in advancing this vision;
- Immediate opportunities for institutional linkages including expansion of current 2+2 programs; expanding the role community colleges play in high school curriculum development; and promoting connections between community colleges, alternative programs and juvenile justice programs;
- Immediate opportunities for resource redirection and integration, including linking welfare development block grant funds, State education funds, JTPA funds, and juvenile justice funds; and
- Common benchmarks and standards.

As experience in Oregon and elsewhere can attest, state-level coordination of this kind is notoriously difficult. Apart from the incentive of declining resources, however, it should be noted that some changes are easier to make than others. Evolving welfare reform, for example, gives states the opportunity to use a large pool of resources in a different way. Expanded linkages between community colleges, schools and alternative providers benefit all parties.

Oregon's new structure for education and workforce reform provides a platform for advancing these opportunities. The State should consider state-level integration as a necessary part of this agenda.

➤ **Focus resources on professional development with an emphasis on integrating academic and professional/technical education and school and work-based learning**

Perhaps the strongest finding of this assessment is the near (and rare) consensus on the need for professional development focused on the education improvement agenda. Although there is an equally strong consensus that overall resources are limited for new professional development, there is unrealized potential in incorporating STW principles into existing professional development efforts. Given the breadth of the education improvement agenda, professional development sponsored by the State, ESD, and local school districts, as well as that organized around such initiatives as the SIPs, Title I, Special Education, and Carl Perkins should be viewed as opportunities to infuse STW principles.

Looking beyond existing public dollars, the private sector may be an untapped resource for professional development. Employers in the State have shown real interest in teacher internships, and to a lesser extent, in working with teachers on curriculum development. Employers may well be responsive to an organized appeal from the State, region, or local districts, particularly when their potential contribution is linked to the school improvement agenda.

In any case, both the overall findings of this assessment and recent technical assistance efforts strongly suggest that professional development should emphasize opportunities for contextualized learning and for blurring or erasing the line between academic and professional technical educators. Where feasible, professional development should include both academic and vocational teachers, and should focus on opportunities to jointly work toward integrated curriculum, applied learning, and team planning and teaching.

➤ **Develop a substantive technical assistance strategy to aid RWQCs, communities and schools in rethinking workforce development strategies emphasizing the region's potential to redirect programs and resources such as Title I, JTPA and ADM, and to promote connections among community colleges, schools and alternative providers**

To fulfill their role, RWQCs need assistance in gaining an understanding of the workforce development system. One element of this assistance, as noted above, is increased staff capacity. Another is direct assistance from the State in understanding and more effectively using the current system. The State's technical assistance strategy should be based in an interagency team of representatives from key youth-serving agencies -- ODE, community colleges and JTPA, welfare, and juvenile justice -- at a minimum.

In conjunction with a state-level planning effort, the team should provide strategic assistance to individual RWQCs in the current uses and potential redeployed uses of pertinent program activities and resources. Assistance should be focused on specific opportunities for development of an integrated workforce strategy, including:

- Enhancing connection with community colleges and higher education;
- Linking STW with achievement of the CIM and CAM;
- Using ADM to support STW strategies for alternative programs;
- Connecting JTPA-funded summer programs to STW strategies;
- Linking Title I and STW; and
- Integrating ongoing welfare reform with STW.

ODE's School-to-Work Office can take the first step in this effort by developing conceptual models for each area, showing the opportunities for redirecting current activities and resources to advance the STW initiative.

The State and regions must give serious consideration to these recommendations, if Oregon is to effectively continue its STW initiative. Such consideration, however, has possible implications far greater than the issue of fulfilling federal grant requirements. At stake, are resources that may be important to Oregon's efforts to achieve its overall education improvement agenda.

With STW support, in the form of the federal grant, slated to conclude in five regions in the next six months, it is not clear what resources, if any, are available to sustain the initiative in most places. The loss of these resources may seriously jeopardize the STW movement. It also will likely threaten other capacities communities have as part of their STW initiative. Key areas for State and regional consideration include:

- *The use of remaining STW federal funds.* Overall, this may amount to as much as \$5-\$7 million, counting both unallocated funds at the state level and non-expended funds at the

regional and local level. How these funds are spent in the remaining years, if the STW vision is to be fully realized and is to support education improvement, is a question that the State and regions need to revisit together.

- *Organizational capacity.* Currently, organizational capacity exists primarily in the form of RWQCs and their institutional efforts to support STW initiatives within their regions. As noted earlier, in most places the RWQC has served as a useful forum for involving the business community in STW and education improvement. Another example of capacity is the impressive data systems that have been developed in several regions. These systems catalogue, profile, and help connect students and teachers with work-based learning opportunities. These efforts are all important to CIM and CAM development. How this organizational capacity will be maintained or even rebuilt, if STW concludes, is an important issue for consideration.
- *Business commitment.* This is perhaps the most sensitive and problematic issue surrounding the future of STW in Oregon. Employers across the State have responded to STW in impressive numbers and with impressive commitments. In several places, however, the lack of progress within schools has frustrated employers who see work-based learning opportunities going unused by both teachers and students. Continuation of these problems could have serious ramifications for the willingness of businesses to participate in future education improvement efforts, particularly as schools seek to implement the CAM.

Failure to consider these matters may jeopardize long-term education improvement and workforce development efforts. In many respects, the issue is not whether STW succeeds as a program in Oregon. In fact, the effort might be better served by discarding the term “school-to-work” and directing attention to the idea of STW as an approach to education. Perhaps the most critical issue confronting Oregon’s education and workforce development leaders is the extent to which the five core principles articulated as the foundation for the STW initiative serve as the driving force for education improvement for all students across the State.