**2020-2023 Student Investment Account Implementation and Planning**

**Important Activities and Dates**

**January 5, 2021**

On Friday, December 18, ODE released its Student Investment Account (SIA) [Supporting Quality Implementation](https://www.oregon.gov/ode/StudentSuccess/Documents/SIAsupportingqualityimplementation.pdf?utm_medium=email&utm_source=govdelivery) guidance, which describes what districts should be doing in their SIA implementation and planning from Fall 2020-2023. Listed below are the activities and due dates for the **2020-21 SIA reporting requirements** and the **SIA plan update** **requirements** for the 2021-23 biennium (indicated below in shaded rows with red font). The chart is a summary of the important activities and dates. Please feel free to reach out to Tanya Frisendahl if you have any questions.

| Activity | Date Due | Notes | Guidance Ref. - [ODE Document](https://www.oregon.gov/ode/StudentSuccess/Documents/SIAsupportingqualityimplementation.pdf?utm_medium=email&utm_source=govdelivery) |
| --- | --- | --- | --- |
| Claim 1st 40% of funds. | October 2020 - now | First 40% of funds can be claimed once fully executed grant agreement in place. | Page 3 |
| ODE sends electronic customized reporting forms to districts. | January, 2021 | Templates can be used to prepare responses then transfer to customized Smartsheet. | Page 8 – [Programmatic Progress Report Template](https://www.oregon.gov/ode/StudentSuccess/Documents/SIAProgrammaticProgressReportTemplate.docx)Page 9 – [Financial Progress Report Template](https://www.oregon.gov/ode/StudentSuccess/Documents/SIAFinancialProgressReportTemplate.xlsx) |
| Claim next 30% of funds. | January 1, 2021 | 40% of the funds could have previously been released. If first claim hasn’t been made, 70% of funds can be claimed if fully executed grant agreement in place. | Page 3 |
| 1st Progress Report due. | January 31, 2021 | Covers programming and expenditures from July 1, 2020 – Dec. 31, 2020. If fully executed grant agreement is not in place by Jan. 15th, 1st progress report due date will be 3 weeks from date of the executed grant agreement. | Pages 8-9; click on links to use reporting templates prior to putting in Smartsheets. |
| ODE releases preliminary allocations for 2021-2023 and SIA Budget Template. | January, 2021 | Allocations are subject to change based on state revenue projections. | Page 10 and Page 16 |
| ODE releases updated SIA Community Engagement Resource. | January, 2021 | Takes into account current conditions (Covid-19, Oregon wildfires, systemic racism, reduced SIA funding). Builds off of previous SIA Engagement Toolkit. | Pages 4-5 |
| Community Engagement | January – May\* | Re-engage with community given current conditions and possible plan changes. | Pages 4-5 |
| Equity Lens | January – May\* | Re-visit district equity lens; apply equity lens to current results and plan changes. | Page 5 |
| Progress Markers | January – May\* | Consider Progress Markers when updating SIA plan. | Pages 6-7; Appendix A (pages 13-14) |
| Draft LPGTs and local optional metrics | ODE anticipates changes to this requirement | Suspended for 2020-2021; waiting for ODE guidance. | Page 16-17 |
| File for an extension to use current SIA funds through September 30, 2021. | March 1–31, 2021 | ODE plans on allowing all extension requests. **With extension,** 3rd progress report/annual report due Nov. 30, 2021. ODE will send district a grant agreement amendment by June 30, 2021. | Page 4 |
| Claim final 30% of funds. | April 1, 2021 | Final draw for 2020-2021 funding. | Page 3 |
| 2nd Progress Report due. | April 30, 2021 | Covers programming and expenditures from Jan 1, 2021 – Mar 31, 2021. | Pages 8-9; click on links to use reporting templates prior to putting in Smartsheets. |
| ODE releases final allocations estimates for 2021-2023. | May, 2021 | Aligns with May ADM; reflects legislative adjustments. | Page 10 |
| Submit updated SIA plan adjustment or amendment for the 2021-22 SY. | May 1 – June 30, 2021 | Based on recent community engagement and equity lens application via Google form. Failing to submit by June 30, 2021 causes loss of funds. | Pages 11-12; Appendix B (pages 15-16) |
| ODE amends/extends grant agreements. | Through June 30, 2023 | ODE will amend all Year 1 grant agreements to extend through June 30, 2023 through Smartsheet. | Page 12 |
| Last day to spend 2020-2021 funds **without** an approved extension. | June 30, 2021 | Unused funds returned to ODE (SIA). | Page 4 |
| Complete 3rd Progress and Annual Report. | July, 2021 | Covers programming and expenditures from Apr 1, 2021 – June 30, 2021; additional questions added for annual report. | Pages 8-9; click on links to use reporting templates prior to putting in Smartsheets. |
| 3rd Progress and Annual Report posted on website and presented to the Board. | August, 2021  | This report must be posted and presented to the Board.  | Pages 8-9  |
| 3rd Progress and Annual Report due. (Unless requesting an extension) | August 31, 2021(extension – November 30,2021) |  Board minutes sent to ODE. | Pages 8-9 |
| Last day to spend funds **with** an approved extension. | September 30, 2021 | Extension must be approved. Application window was March 1-31. | Page 4 |
| Complete 3rd Progress and Annual Report **with extension.** | October, 2021 | Covers programming and expenditures from Apr 1, 2021 – June 30, 2021; additional questions added for annual report. | Pages 8-9; click on links to use reporting templates prior to putting in Smartsheets. |
| 3rd Progress and Annual Report posted on website and presented to the Board **with extension.** | November, 2021  | This report must be posted and presented to the Board.  | Pages 8-9  |
| 3rd Progress and Annual Report due for districts **with** **an approved extension.** | November 30, 2021 | Covers programming and expenditures from Apr. 1, 2021 – Sept. 30, 2021; additional questions for annual report. | Page 8 (note #6) |
| Annual municipal audit posted on website and presented to the Board. | January, **2022** | This report must be posted and presented to the Board.  | Page 9 |
| Annual municipal audit due. | January 31, **2022** | Integrates quarterly financial reports. Minutes sent to ODE. Note: due in **2022**. | Page 9 |
| Full strategic planning and application cycle; update LPGTs and Progress Markers. | **2022-2023** | Development of new 4 year plans. | Page 12 |

\*Exact timeline to be determined by district