



THE OREGON STATE BOARD OF EDUCATION

Provide leadership and vision for Oregon's Public Schools and districts by enacting equitable policies and promoting educational practices that lead directly to the educational and life success of students.

AGENDA

Regular Meeting

<https://livestream.com/accounts/4436497>

255 Capitol Street NE

Salem, OR 97310

Thursday, March 17, 2022

State Board of Education meetings comply with open meeting laws and accessibility requirements. Requests for an interpreter for the hearing impaired or for other accommodations for persons with disabilities should be given to [Corey Rosenberg](#) at 503-947-5740, at least 48 hours before the meeting. You can access all board materials on our [Boardbook](#) page. Staff respectfully request that you submit email copies of written materials before or after your testimony.

Please note: all times are approximate.

1. Call to Order

A. Roll Call

Time: 9:00 AM

B. Board Member Reports

Time: 9:05 AM

2. Public Comment

A. Written Public Comment Received.

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3. Consent Agenda

Time: 10:05 AM

A. Talented and Gifted Identification: OAR 581-022-2325 13

B. Menstrual Dignity for Students: OAR 581-021-0600 - 581-021-0609 22

C. Vision Screening Reimbursement Program Update: OAR 581-021-0031 31

D. Access to Linguistic Inclusion: OAR 581-002-0200 - 581-021-0580 39

E. Intensive Program and Student Success Team Update: OAR 581-017-0729 - 581-017-0744 78

F. Senate Bill 744 Implementation: OAR 581-022-2215 86

4. First Readings

A. Background Check Fees: OAR 581-021-0511 - 581-021-0512 and 581-045-0586 and 581-045-0587 99

Time: 10:10 AM

Brock Dittus, Pupil Transportation and Fingerprinting

B. Updates to Division 51: OAR 581-051-0200 - 581-051-0555 109

Time: 10:15 AM

Jessica Visinsky, Child Nutrition

C. Continuous Improvement Plan Timelines: OAR 581-022-2250 114

Time: 10:30 AM

Tim Boyd, Office of Education Innovation and Improvement



D. Senate Bill 513 Implementation Civics Credit Requirement: OAR 581-022-2000	302
<i>Time: 10:55 AM</i>	
Amit Kobrowski and Alexa Pearson, Office of Teaching, Learning, and Assessment	
E. Open Educational Resource (OER) Instructional Materials Fee Waiver: OAR 581-011-0090	325
<i>Time: 11:10 AM</i>	
Aujalee Moore, Office of Teaching, Learning, and Assessment	
5. <u>Adoptions</u>	
A. Oregon State Seal of Biliteracy Updates: OAR 581-021-0580 and 581-021-0584	342
<i>Time: 11:30 AM</i>	
Deb Lange, Assistant Superintendent, and Taffy Carlisle, Office of Equity, Diversity, and Inclusion	
B. Charter School Waiver Request: The Lighthouse School	362
<i>Time: 11:45 AM</i>	
Kate Pattison, Office of the Director and John Gibson, Board Member, The Lighthouse School	
6. <u>Break for Lunch</u>	
<i>Time: 12:00 PM</i>	
7. <u>First Readings</u>	
A. Charter School Renewal: Eagle Charter School	373
<i>Time: 1:00 PM</i>	
Kate Pattison, Office of the Director and Dr. Marie Balance, Principal, Eagle Charter School	
8. <u>Informational Reports</u>	
A. Remote Learning Program Quality Standards Update	438
<i>Time: 1:30 PM</i>	
Ken Greenbaum, Allie Ivey, and Alexa Pearson, Office of Teaching, Learning, and Assessment, and Kate Pattison, Office of the Director	
B. Director's Report	458
<i>Time: 2:00 PM</i>	
Colt Gill, Director	
9. <u>Adjourn</u>	
<i>Time: 3:00 PM</i>	

PATTISON Kate * ODE

From: Claudia Gonzalez <claudgonzalez147@aol.com>
Sent: Tuesday, February 1, 2022 7:33 PM
To: PATTISON Kate * ODE
Subject: Eagle Charter

Hi Kate,

I really like eagle! My eldest daughter went to eagle 8 years ago. Best school experience she ever had. Of course now that I have a kinder and a first grader I couldn't pass on the opportunity to send my kiddos to eagle. Mrs Doran and Ms Andrews are great kinder teachers! Mr. Dickson is straight to the point and I really like that for my daughter. Mr. Woodside and Mrs. Powers are great with the kiddos. Then You have Mrs. Perez and Nancy who are just amazing! Last but not least Dr. Ballance is AWESOME! She leads a great ship. Even with all this COVID stuff going on I haven't seen or notice her go hay wire just like the rest of the world. I totally vote for the school to stay open. Side note I might not know all the teachers but they are mighty friendly at pick up.

Claudia Canchola

Hello and thank you for hearing me,

My name is Joe Casvin and I would like to have these comments entered into record for the hearing concerning Eagle's Charter School's renewal. I am against masking restrictions.

Mask Effectiveness

By this time, there has been time to take a good look at the effectiveness of masks in reference to COVID-19. Below are two randomized trials that represent just a small sample of the increasing amount of empirically driven data showing the very small effect of wearing a mask to stop COVID-19.

Recently (9/1/21) a randomized trial was conducted that included 342,183 individuals. This particular study was aimed at increasing the use of masks to prevent the spread of COVID-19. In the study, which can be found on the CDC's website, researchers found that masks provided only a 11.6% reduction in COVID-19 like symptoms and a 9.5% reduction in positive test results found in the trial groups.¹ Another study from 2020 conducted with 4,800 participants found that only 1.8% of those in the mask wearing group and 2.1% of those in the control group became infected with COVID-19.² That is a difference of only .3%, which is not considered a statistically significant number by anyone.

Oregon Health Authority (OHA) Numbers

I would also like those conducting the hearing to consider Oregon's COVID-19 numbers. The numbers I refer to are the death rate and infection rate as taken directly from the OHA's own website³. As of 1/20/22, the data from the OHA website shows that of the 559,960 total cases of COVID-19 in Oregon, 5916 unfortunate individuals lost their lives since the pandemic started. That is a rate of 1%, which is a statistically insignificant number. Next, let us calculate the COVID-19 positive test rates. Of the 9,458,399 tests given, 748,029 were positive for COVID-19. That is a positive rate of just 7.9%. The death rate alone

¹ <https://www.science.org/doi/full/10.1126/science.abi9069>

² <https://www.acpjournals.org/doi/10.7326/M20-6817>

³ <https://govstatus.egov.com/OR-OHA-COVID-19>

should be sufficient evidence that state wide restrictions were unnecessary from the very beginning. The inaccuracy of the testing and the lack of considering of preexisting conditions should also be taken into account.

Natural Immunity vs Vaccine

At this point, natural immunity has been shown to be at least equally effective (if not stronger and longer lasting) in reinfection rates concerning COVID-19. This is a statement from a study concerning natural vs vaccine interventions. "From a review of these studies, we conclude that there is currently no statistical advantage to vaccination in the COVID-naive compared to natural immunity in the COVID-recovered."⁴ Here is another statement take from another separate corroborating study, "This study demonstrated that natural immunity confers longer lasting and stronger protection against infection, symptomatic disease and hospitalization caused by the Delta variant of SARS-CoV-2..."⁵

Other Information Against Restrictions

It has also been shown that the Omicron strain of COVID-19 has a weaker binding affinity than that of the Delta strain making the Omicron strain much weaker.⁶ We should also take a very close look at the country of Sweden, which did not restrict it's population. Of the 1,784,005 confirmed COVID-19 cases, 15,639 unfortunate souls lost their lives.⁷ This comes out to a death rate of just .8% and the Swedish government had no lock downs, no masks, no social distancing, etc.

I wanted to keep my statement short as to not abuse this opportunity, but I have found quite a lot of empirically driven evidence showing the ineffectiveness of masking to reduce COVID-19 spread. I believe that those conducting the investigation for this hearing could also very easily access this information. The information I have gathered above either points to a

⁴ <https://www.ncbi.nlm.nih.gov/pmc/articles/PMC8627252/>

⁵ <https://www.medrxiv.org/content/10.1101/2021.08.24.21262415v1.full.pdf>

⁶ <https://www.nature.com/articles/s41392-021-00863-2>

⁷ <https://www.worldometers.info/coronavirus/country/sweden/>

fundamental lack of understanding from both the school's and Oregon's leaders or a move to increase control that violates the Constitutionally guaranteed rights of the people of Oregon. Either of these are extremely unacceptable and punishable by law.

PATTISON Kate * ODE

From: Michael Wright <mikeproduct@googlemail.com>
Sent: Wednesday, February 2, 2022 6:00 PM
To: PATTISON Kate * ODE
Subject: Eagle Charter School

Hello,

I'm writing on behalf of Eagle as a parent who's son has gone there since Kindergarten. He's now in third grade and doing very well there.

We chose the school because of its micro-society focus, small class sizes, and the lovely campus. We've been happy with how the school is able to give attention to all students and have allowed our brilliant son to thrive! He will continue going there until 5th grade, at which time, we hope there will be an extension of the grades or he can get into a school we like just as much.

Thanks for your time,
Michael and Jana Wright

PATTISON Kate * ODE

From: Marie Ballance <mballance@eaglecharter.org>
Sent: Tuesday, February 1, 2022 4:44 PM
To: Kate.pattison@state.or.us
Subject: Fwd: Testimony

Hi Kate,

Below is a message of support from a parent of a first grader who wanted to make sure that she showed her support for Eagle today.

Marie C. Ballance, Ed.D.
(*she/her/hers/ella*)
Superintendent-Principal, Eagle Charter School
mballance@eaglecharter.org
www.eaglecharter.org

"If you're always trying to be normal you will never know how amazing you can be.." - Maya Angelou

----- Forwarded message -----

From: **Ranada Young** <ranadayoung@gmail.com>
Date: Tue, Feb 1, 2022 at 4:31 PM
Subject: Testimony
To: Marie Ballance <mballance@eaglecharter.org>

Not the best, but wanted to show my support

This is my son's second year at Eagle. He is a young 1st grader, having a late summer birthday. I was concerned that he might not be ready for 1st grade after distance learning last year, but his teachers did so well in distance learning that not only was he ready for 1st grade, but he also loved his school and all his teachers. As a new student, during distance learning, and a pandemic, he knew that Eagle was HIS school and he loves it. I am a high school teacher, so Elementary level is beyond my scope of expertise, but I am ecstatic about his progress this past year and a half, and I look forward to him continuing here until middle school.

This message (and any associated files) may contain confidential and/or privileged information. If you are not the intended recipient or authorized to receive this for the intended recipient, you must not use, copy, disclose or take any action based on this message or any information herein. If you have received this message in error, please advise the sender immediately by sending a reply e-mail and delete this message. Thank you for your cooperation.

Jan. 30, 2022

To: Oregon Board of Education
and ODE Leadership

From: Shannon Priem, Chair
EAGLE Charter School

I know I speak on behalf of the entire EAGLE Charter School Board when I strongly support the renewal of our public charter. Thank you for giving us this opportunity to applaud our school.

The past two years, despite the overwhelming and unprecedented challenges, EAGLE charter has made tremendous progress – not only in creating one of the first distance learning platforms that other districts emulated, but in addressing areas noted for improvement and growth during our last charter renewal hearing.

Dr. Balance can provide the ground-level details, while the Board can attest to a feeling of confidence and accountability, as all issues or concerns we brought up were address quickly and positively.

What stood out? I'm especially proud of our ability to adapt quickly to changes – from masking/no masking and social distance rules, to switching back and forth between in-person and remote learning – with hybrids created to meet every child's learning and health challenges.

Our board has never been without answers, as leadership keeps abreast of daily changes, whether from ODE from the CDC on Covid best practices. Our staffing shows this nimbleness – especially after hiring a distance learning teacher to support all six grades with learning options at school – and at home.

Among the many highlights . . .

- We offered our first summer enrichment program, reaching 59 percent of our students.
- The Board completed a total re-write of all governing policies through OSBA and subscribes to on-going updates. This was a HUGE accomplishment!
- More accountable financial practices, based on our last charter renewal feedback, were instituted.
- We started a very robust diversity and inclusion committee, resulting in our All Students Belong Policy and monthly agenda reports – and, a more diverse pool of guest speakers for students via “zoom.”
- Distance learning impacted MicroSociety curriculum, but we adjusted with virtual field trips and staff-inspired lessons on community-minded themes.
- Board members participated in more OSBA-sponsored Webinars, on governance and evaluating top leadership, resulting in a more systematic “best practice” approach to Dr. Balance’s annual evaluation.

- The board never had to worry about health guidelines – school leadership stayed ahead of COVID restrictions, even before we asked, and had a solid handle on federal and state assistance grants.
- The outreach, donations and support to parents not only affected by Covid but by last year's wildfire displacements was overwhelming. Food boxes were delivered early on in the pandemic and holiday donations – some even inspired by student leadership – were inspiring.
- Our parent club continued fund-raisers and socially distant activities, some “hybrids” like bingo night for both in-person and virtual contestants.

It is a pleasure to serve on this board, and because of the progress “despite all odds” I see evident among staff and leadership – all solidly focused on students -- I am fortunate to be part of this family, and happy to continue on the Board.

Thank you for considering EAGLE's charter renewal!

Shannon Pruett, Chair

From: [Margaret DeLacy](#)
To: [StateBoard.PublicEmail@](#)
Cc: [Board@oatag.org](#)
Subject: Testimony for OAR 581-022-2500 and OAR 581-022-2325
Date: Wednesday, March 16, 2022 11:11:36 PM

Testimony for the Oregon State Board of Education on revisions for
OAR 581-022-2500 (Programs and Services for Talented and Gifted Students)
OAR 581-022-2325 (Identification of Academically Talented and Intellectually Gifted Students).

Dear Chair Howard and members of the Oregon State Board of Education

The Oregon Association for Talented and Gifted (OATAG) is a non-profit, non-discriminatory 501(c)3 membership association founded in 1978. OATAG advocates for the needs of talented and gifted (TAG) children and serves as a resource for families, educators, and communities.

OATAG supports the revisions to OAR 581-022-2500 which will increase communication and transparency among the staff in the Department of Education, our local school districts, and our students and parents throughout the state.

OATAG also supports the goal of improving the identification process to increase equity and effectiveness. Since 2004, as Oregon's student population has increased and the state's education budget has doubled, the number of TAG students identified has remained flat at about 40,000. The current identification process has created serious disparities in the representation of identified TAG students from culturally, linguistically, and economically diverse groups. There is an urgent need to address these inequities.

We appreciate the effort of our TAG specialist, Angela Allen, to address disparities in TAG identification, to assist districts to identify every student who needs additional services, and to incorporate current research on "best practices." However, effective and inclusive programs require funding, staff training, and accountability. Oregon's TAG system lacks all three. This short-changes our students and frustrates our educators.

When you approve these new rules, OATAG urges you to join us in calling for enough funding to implement them and the services that should accompany them. Without categorical funding, the students most likely to be short-changed or missed entirely are rural, low income, twice-exceptional, and culturally, linguistically, and racially diverse students. True equity demands that we provide the resources needed to educate every student, not just add their names to a list and walk away.

We are also concerned that details of the new identification process will be placed in a "guidance" document instead of in rule. There is no process for holding districts accountable for implementing a guidance. Even if districts incorporate the guidance in their written policies, the Department of Education has repeatedly stated that it will not accept appeals alleging a violation of a district's written policies unless those specific policies are also in the administrative rules.

To sum up, we support the goals embedded in the new identification rule but we believe that stronger steps are needed to ensure that those goals are achieved.

Thank you very much,

Sincerely yours,

Margaret DeLacy, Ph.D.
President
Oregon Association for Talented and Gifted

581-022-2325 Identification of Academically Talented and Intellectually Gifted Students

(1) Each school district shall have ~~local district~~ policies and procedures for the identification of talented and gifted students as defined in ORS 343.395, ~~who demonstrate outstanding ability or potential in one or more of the following areas:~~

(a) ~~General intellectual ability as commonly measured by measures of intelligence and aptitude. This population of students demonstrates exceptional performance when compared to applicable relevant developmental or learning progressions, with consideration given for variations in student's opportunity to learn and to culturally relevant indicators of ability.~~

(b) ~~Unusual academic ability in one or more academic areas. Students identified as talented and gifted require differentiated instructional services and/or programs designed to address their strengths and needs.~~

(2) ~~In the identification of talented and gifted students, district~~ The policies and procedures ~~shall~~ must meet the following requirements:

(a) ~~Provide professional development for~~ Districts shall use research-based best practices to identify students from underrepresented populations including: ethnic minorities, students with disabilities, students who are culturally and/or linguistically diverse, or economically disadvantaged. ~~Train those responsible for identification of students who are talented and gifted;~~

(b) ~~Use evidence-based practices that include a variety of tools and procedures to determine if a student demonstrates a pattern of exceptional performance and/or achievement that is relevant to the identification of talented and gifted students under ORS 343.395. A team shall make the final decisions on the identification of students using the information collected under paragraphs (c) and (d) of this section. No single test, measure or score shall be the sole criterion. A record of the team's decision, and the data used by the team to make the decision, shall become part of the education record for each student considered.~~

(c) ~~Utilize and collect and use~~ multiple modes and methods of qualitative and quantitative evidence to allow appropriate members of a student's identification team to make a determination about the identification and eligibility of the students for talented and gifted services, supports, and/or programs; ~~with no single test or piece of evidence eliminating a student from eligibility.~~ Districts shall collect behavioral, learning and performance information and include the information in all procedures for the identification of students.

(d) Use Distinguish methods and practices that minimize or seek to eliminate the effects of bias in assessment and identification of students from historically underrepresented populations including, but not limited to:

(A) Students who are racially/ethnically diverse;

(B) Students experiencing disability;

(C) Students who are culturally and/or linguistically diverse;

(D) Students experiencing poverty; and

(E) Students experiencing high mobility. The following measures and criteria for identifying the intellectually gifted and the academically talented shall be used by the team:

(A) Intellectually gifted students shall score at or above the 97th percentile on a nationally standardized test of mental ability; and

(B) Academically talented students shall score at or above the 97th percentile on a test of total reading or a test of total mathematics from a nationally standardized test battery, a nationally standardized test of reading or mathematics, or a test of total English Language Arts/Literacy or total mathematics on the Smarter-Balanced-Assessment.

(e) Incorporate assessments, tools, and procedures, that will inform the development of an appropriate plan of instruction for students who are identified as talented and gifted and describe how information from the assessments, tools and procedures used in the identification for talented and gifted students will be used to support development of the plan of instruction.

(f) Identify how the educational record under ORS 326.565 of the student being considered will document and reflect the record of the team's decision and the procedures and data used by the team to make the decision.

(3) The following sources of evidence may be used by the identification team to provide students with multiple opportunities to demonstrate a pattern or preponderance of evidence of talent or giftedness:

(a) Local Performance Assessment data, as defined in OAR 581-022- 2115, using local norms (building or district),

(b) National and/or state standardized assessment data using national and/or local norms (building or district),

(c) Evidence of rapid language acquisition, accelerated learning, and advanced vocabulary in any language

(d) Research-based rating scales,

(ed) Research-based comprehensive observational instruments, or

(fe) Learning progressions, performance tasks, work samples, and other measures provided by the Department of Education.

(4) Academic evidence reviewed shall align to the full depth, breadth, and complexity of Oregon's content standards and benchmarks. Standardized assessments used for academic/achievement-based identification shall include technical documentation demonstrating alignment across the depth, breadth, and complexity of Oregon's content standards or documentation of intended use for the purpose of talented and gifted identification.

(5) Standardized assessments used for intellectually gifted identification shall include technical documentation demonstrating alignment to research-based best practices inclusive of students from underrepresented populations.

(6) Evidence of rapid language acquisition, accelerated learning, and advanced vocabulary in any language. Despite a student's failure to qualify under paragraphs (d) (A) and (B) of this subsection, districts, by local policies and procedures, shall identify students who demonstrate the potential to perform at the 97th percentile.

~~(367)~~ School districts may identify additional students who are talented and gifted as defined in ORS 343.395, as determined by local district policies and provisions, if the students demonstrate outstanding ability or potential in one or more of the following areas:

- (a) Creative ability in using original or nontraditional methods in thinking and producing.
- (b) Leadership ability in motivating the performance of others either in educational or non-educational settings.
- (c) Ability in the visual or performing arts, such as dance, music or art.

Statutory/Other Authority: ORS 343.391 - 343.413

Statutes/Other Implemented: ORS 326.051

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<p>SUBJECT: TAG Identification/OAR 581-022-2325</p> <p>STAFF NAME & OFFICE: Angela Allen, Alexa Pearson, and Dan Farley; Office of Teaching, Learning, and Assessment</p> <p>Existing TAG Identification rules are outdated and inequitable. The revised rules specifically address culturally responsive identification practices and research-based practices rooted in educational equity. Supporting documents (toolkits and guidance) will accompany revised rules to support districts and ESDs achieve outcomes that are more equitable.</p> <p><input type="checkbox"/> New Rule <input checked="" type="checkbox"/> Amend Existing Rule <input type="checkbox"/> Repeal Rule</p>	<p><input checked="" type="checkbox"/> Consent Agenda <input type="checkbox"/> Presentation <input checked="" type="checkbox"/> No Presentation</p> <p><input type="checkbox"/> Action <input type="checkbox"/> Temp Rule <input type="checkbox"/> Presentation <input type="checkbox"/> No Presentation</p>
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BACKGROUND

Identification of Talented and Gifted (TAG) students in Oregon is an integral component of educational equity. Once a student is identified, students are required by statute (ORS 343.391 - 343.413) to receive special educational programs and/or services. The identification process is vital to supporting the needs of academically talented and/or gifted students in Oregon’s public schools. Districts are required annually to report status of compliance specific to OAR 581-022-2325.

Based on state and national data, feedback using surveys, meetings, and open office hours that were attended by community partners, district leaders, families and caregivers, national researchers, and state-level TAG specialists from over thirty states, the rules pertaining to TAG identification were revised considerably to create more equitable pathways of TAG identification.

In September 2020, the ODE TAG Education Specialist presented an early rule concept to the Rules Advisory Committee (RAC) to share the vision of revising the TAG identification rules to achieve more equitable opportunities, access, and outcomes for students who are currently overlooked or marginalized in the TAG identification process.

The TAG identification draft rules represent a culmination of voices and collaboration from Oregon districts and education-based partners, including ESDs, the Oregon Association for Talented and Gifted (OATAG), various offices within ODE, national gifted education researchers, and state-level gifted education specialists.

The revised rules will elevate and center equity by addressing the use of local norms, culturally responsive practices, local assessments, multiple modes and methods of collecting evidence, and other indicators of giftedness, such as accelerated language acquisition and advanced

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vocabulary in any language. The revisions also include language that connects TAG identification to TAG programs and/or services provided by the district.

Based on survey feedback as well as qualitative data shared during office hour sessions, meetings, and professional development opportunities, a pattern of marginalization and harm was apparent, particularly in the category “Potential to Perform.” Therefore, the category of, “Potential to Perform” has been removed in an effort to cease unintended, perpetual harm. Also removed from the current rules is deficit-based language and the 97th percentile threshold as a standard to exclude further consideration of talent and/or giftedness.

Partner Voice/Input

September 2020 - Conducted a survey through the TAG listserv (740+ contacts) specific to the identification process, especially the rule pertaining to “Potential to Perform.”

September 2020 - Created a technical advisory committee and began meeting to discuss the revision of TAG identification rules through the lens of ODE’s equity stance, current equity research in gifted education, and applicable local (district) barriers that impede equitable identification. The technical advisory group is composed of 32 districts throughout Oregon including representation from small and rural districts.

September 2020 – September 2021 - The technical advisory group met five times to review feedback from national researchers, gifted education state leaders throughout the country, and education-based community partners and organizations.

September 2020 – November 2021 – Continued internal and external engagement through monthly meetings, email conversations, and document/feedback sharing with national researchers and colleagues (ODE and national).

April 2021 – December 2021 - Partnered with Dr. Dan Farley, Director of Assessment in the Office of Teaching, Learning, and Assessment

May 2021 – December 2021 - Partnered with gifted education specialists from North Carolina and Dr. Matthew Makel from Johns Hopkins University. Partnership was centered on equitable identification and matching local identification with local services.

August 2021 – Informational Presentation at the Oregon State Board of Education Retreat

August 2021 – Disseminated draft rules to colleagues working in the offices of: Teaching, Learning, and Assessment; Indian Education; Equity, Diversity, and Inclusion; Enhancing Student Opportunities.

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September 2021 – Rules Advisory Committee (RAC) presentation; received feedback from several members

September 2021 – Met with OATAG president

September 2021 – November 2021 – met with five RAC members individually (1 hour each) to listen to concerns and feedback. The voice and partnership of all five RAC members are included in the revised rules.

November 2021 – Met with OATAG president and two board members. Their voice and partnership are included in the revised rules.

November 2021 – Draft of revised rules was shared with thirty gifted education state leaders in twenty-five states to provide feedback.

November 2021 – Held open office hours for districts (invitation sent through the TAG listserv) to review the draft of revised rules and provide input.

January 2022 – Held three open engagement sessions for district educators and parents (invitation sent through the TAG listserv) to review the draft of revised rules and provide feedback.

January 2022 – Sent out a survey through the TAG listserv and directly to district TAG coordinators to provide feedback regarding revised draft rules. Districts were invited to send out the survey to parents.

February 2022 – Presented to families and educators at OATAG’s (Oregon Association for Talented and Gifted), “TAG Talk.” Addressed questions from families specific to districts choosing reasonable percentile thresholds, local norms, and training were addressed using relevant data and research.

SUMMARY OF PREVIOUS BOARD ACTION

An informational presentation was given to the State Board of Education at the August 2021 retreat. The board asked questions and provided feedback. No action was taken.

First reading was presented in December 2021. No action was taken.
Second reading was presented in January 2022. No action was taken.

HAS THE RULE CHANGED SINCE LAST BOARD MEETING?

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- N/A; first read—hasn't been before board
- No; same as last month (January 2022; attached rules to docket)
- Yes – As follows:

POLICY ISSUE OR CONCERNS

While our state data since 2015 shows that districts have slightly increased TAG identification among historically underrepresented and marginalized communities, the revised rules will move our work forward to obtain a more just and equitable identification process. Given the long existing disproportionality of TAG identification of our underrepresented populations in conjunction with the challenges that districts are navigating specific to their current identification practices, the revised rules are intended to provide districts with multiple pathways in gathering evidence to determine TAG identification. While many districts have been working intentionally on improving research-based equitable identification practices since 2015, if the proposed rules are adopted, all districts, with the support and guidance from ODE, will need to revise their policies and practices to reflect more equitable pathways.

Partners were intentionally involved to create a collective voice for the state of Oregon as well as ensuring our draft rules are rooted in equity-based gifted education research. It was important to have representation from districts of all sizes throughout Oregon.

The use of local norms will create equitable identification of all students, including students who are historically underrepresented and underserved. This will connect identification to local services and/or programs.

There is anticipation of a steep learning curve and a need for support from ODE as districts implement new identification rules. There will be a toolkit and guidance document published by August 2022 to provide districts with pertinent information specific to local norms, designating local percentile thresholds, assessments, resources, promising practices that also highlight districts throughout Oregon, and presentation templates designed to inform parents of changes to the identification rules. Templates will be translated into languages based on ODE's Communications guidelines.

Compliance of the identification rule changes as reported through the Division 22 standards process will not be reported by districts until November 2023. Districts already have policies and procedures for TAG identification and will receive a toolkit and guidance developed by district leaders throughout Oregon to support their improved identification practices.

EQUITY IMPACT ANALYSIS

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Historically underrepresented populations are disproportionately identified as Talented and Gifted. Districts throughout Oregon as well as collegial partners from over thirty states have expressed concerns regarding potential harm and perpetuation of perception, disparities, and inequities if our current identification standards proceed without caution, consideration, or complete interruption. The adherence to traditional policies that perpetuate harm and create an invisibility of our historically underrepresented and marginalized communities, must be resolved.

The revised rules specifically address students that have traditionally been omitted from the identification process, especially those from historically underrepresented and underserved communities. The intention is to increase the equity of identification which corresponds with instructional services that TAG identified students receive.

FISCAL ANALYSIS

The fiscal impact to districts will be minimal. Based on new rules, districts (and ESDs) will train their district-level TAG coordinator/administrator in identification practices. The TAG Education Specialist at ODE will provide the training through multiple platforms (in-person, teleconference, and pre-recorded webinars) and at no cost to the districts.

Districts will be encouraged to use local assessments and existing assessments rather than purchasing new assessment materials. However, many districts have expressed purchasing new and updated assessment materials specific to TAG identification. While this is not mandated, it is a notable trend.

As districts revise their identification practices, the resource of “time” to train other staff (building level TAG personnel) may also cause fiscal impact.

EFFECT OF A “YES” OR “NO” VOTE

If the Board adopts the revised rules for 581-022-2325, districts will improve their identification practices through the lens and expectation of equity. Districts will also align identification with the programs and services their districts offer creating a means to identification.

If the Board does not adopt the revised rules, currently and historically marginalized students will continue to be under-identified and underserved for TAG services.

STAFF RECOMMENDATION

Oregon State Board of Education

March 17, 2022

AGENDA ITEM: 3.A.

Approve Approve next month No recommendation at this time
Prompted by: State law changes Federal law changes other (ODE)

ATTACHMENTS

Attachment 1:

Draft rules 581-022-2325

Oregon State Board of Education

March 17, 2022

AGENDA ITEM: 3.B.

<p>SUBJECT: Menstrual Dignity Act Rules STAFF NAME & OFFICE: Sasha Grenier, Office of Teaching and Learning</p> <p>The Menstrual Dignity Act is an important piece of legislation that went into effect in July, 2021. The Act creates the requirement for school districts to provide free menstrual products for all menstruating students in public schools in Oregon, including elementary, middle, and high school students.</p> <p><input checked="" type="checkbox"/> New Rule <input type="checkbox"/> Amend Existing Rule <input type="checkbox"/> Repeal Rule</p>	<p><input checked="" type="checkbox"/> Consent agenda <input type="checkbox"/> Presentation <input checked="" type="checkbox"/> No Presentation <input type="checkbox"/> Action <input type="checkbox"/> Temp Rule <input type="checkbox"/> Presentation <input type="checkbox"/> No Presentation</p>
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BACKGROUND

Include the following points for new OARs, OAR updates or changes.

1. History:
 - a. What prompted the rule (why do we have it?) State law? Federal law? Incident? Why are changes/amendments being proposed?
 - b. What is the current requirement in rule or statute?
 - c. Why is this rule being brought forward right now?
2. Purpose
 - a. What function does the current rule hold?
 - b. How long has the rule been in place?
3. Does the board have any areas of discretion or is this strictly mirroring statute?
 - a. If the board does have discretion, those areas should be called out here or in the next section.
4. Stakeholder voice/input (individual and collective i.e., groups)
 - a. Who was involved in bringing this to the Board?
 - b. What did engagement in this process entail?
 - c. Who may be affected by this?
 - d. Whose voice is missing?
 - e. What additional information does the Board need prior to moving forward?

The Menstrual Dignity Act (HB 3294, 2021) is an important piece of legislation that went into effect the 2021-22 school year. The Act created the requirement for school districts to provide free menstrual products for all menstruating students in public schools in Oregon, including elementary, middle, and high school students. This new program will help students participate actively in classes and school activities by alleviating some of the economic strain and experiences of shame that are often barriers for menstruating students accessing their education.

The State Board voted to pass the Menstrual Dignity for Students temporary rules (581-21-0600 through 581-21-0609) on September 16th, 2021. After that, ODE released [the Menstrual Dignity Toolkit](#), created with over 40 stakeholders and partners. The Toolkit was created to provide

Oregon State Board of Education

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AGENDA ITEM: 3.B.

information to schools on how to provide menstrual products in a way that centers inclusivity, privacy, access, and education. The extensive engagement that informed the Toolkit has also worked to inform the permanent rules.

We have involved many stakeholders in drafting the rules. ODE has convened a stakeholder group with members from many school districts, ESDs, community-based organizations, student-led organizations, school boards, county and state government, and more. Members include students, teachers, school finance staff, school administrators, adolescent health experts, and representatives of community-based organizations. Beyond the stakeholder group, we have solicited internal and external feedback through Zoom meetings and a public Google Survey, as well as ODE’s Rules Advisory Committee.

Since the SBE’s first read in January 2022, there have been no changes to the rule. We have continued to work with stakeholders and other interested parties, who have been satisfied with how the proposed rules stand.

SUMMARY OF PREVIOUS BOARD ACTION

1. Has this been before the board before? If so, what action did the board take?
Yes, the Board voted to pass the temporary rules during the September 2021 State Board meeting. The Board also saw these same proposed rules in their January 2022 meeting.

HAS THE RULE CHANGED SINCE LAST BOARD MEETING?

- N/A; first read—hasn’t been before board
- No; same as last month
- Yes – As follows:

POLICY ISSUE OR CONCERNS

These policy issues or concerns could be from the field, stakeholder groups, statements submitted during the comment period, or discussions among ODE staff. Consider the following questions:

1. Stakeholders
 - a. How have you intentionally involved stakeholders who are also members of communities affected by this rule?
 - b. Who are the historically underserved groups affected?
 - c. Has there been consultation or collaboration with tribes in this rule change or policy decision?
 - d. How has the Oregon Department of Education modified or enhanced the rule change or policy decision to address the needs of historically underserved communities?
2. Negative/Positive Effects
 - a. What is the impact on the population most affected by this rule that the board should consider?

Oregon State Board of Education

March 17, 2022

AGENDA ITEM: 3.B.

- b. What possible opportunities, assets or access could this rule provide?
 - c. What is the impact on eliminating the opportunity or achievement gap?
 - d. Have all the potential unintended consequences been considered?
 - e. Does this rule advance the ESSA goals?
3. What are the barriers to more equitable outcomes, either:
- a. State or federally mandated?
 - b. Political?
 - c. Emotional?
 - d. Financial?
 - e. Programmatic?
 - f. Language?
 - g. Geography?
 - h. Size?

There are many components of this Act to closely consider. The intention of the Act is to serve all students equitably with a service that will help them access their education. We know that many students confront barriers related to economic strain, fear, and shame when accessing and using menstrual products and menstrual education—and this Act aims to remedy these inequities. In order to fulfill these intentions of the Act, the rules center student privacy, inclusivity, and accessibility.

After hearing from stakeholders, including youth and youth-serving professions, we understand that equity, privacy, and dignity is a central component to this law. Students must have access to menstrual products in private space that does not require asking a school nurse, counselor, school staff, or other students for supplies. This is also important to serve transgender, non-binary, intersex, and two spirit/indigiqueer students.

The Act also specifies that products must be available in gender neutral, female-designated, and male-designated bathrooms. We have worked with members of the LGBTQ2SIA+ community to ensure that the rule supports, affirms, and includes these students. Similarly, we have also heard concerns to include elements of cultural responsiveness into the education portions of the rule. Instructions, visuals—and even the products themselves must both incorporate and affirm the diversity of Oregon’s student population. Requirements that ensure that students with disabilities have access to these products through considerations including, but not limited to ADA dispenser compliance, offering a variety of products, and inclusive educational supports.

We’ve also been listening to staff from school districts, who have been expressing concern with implementation, compliance, and reporting. We’re working to ensure that funding fulfills our own auditing and reporting requirements without causing an undue burden on school district staff.

Oregon State Board of Education

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AGENDA ITEM: 3.B.

EQUITY IMPACT ANALYSIS

The following questions are designed to examine how the proposed rule, policy or action systematically affect historically underserved students and/or communities.

1. How are historically underserved populations impacted by this docket item?
 - a. Demonstrate how the rule changes, policy, or action could produce other unintended consequences not listed in the docket.
 - b. Refer to *Policy Issue or Concerns* and identify the historically underserved populations affected. Conduct a reflection and examination, which will and should answer 1a.
2. Examine the impact of the rule changes, policy, or action on historically underserved populations in Oregon. Describe this ongoing and/or foreseeable impact, using as much detail as possible.
3. Explain how the rule change, policy or action works toward improving achievement, opportunities and a sense of worthiness for underserved students?

In March, dozens of students shared their stories to the [House Committee on Education](#). These stories were moving and profound, and, unfortunately, often marked by shame and trauma. There were stories about desperately seeking out menstrual products from strangers in the hallway while missing testing time during a college entrance exam, about sacrificing the price of a meal to buy pads, and so many more. According to a [joint survey](#) by Thinx and the Oregon-based organization PERIOD, 1 in 4 teens have missed class due to a lack of access to menstrual products.

Providing free menstrual products to students is an equity issue. Students who experience poverty, homelessness, or come from systems-impacted communities, including transgender, non-binary, intersex, and two spirit/indigiqueer students, are more likely to have unmet menstrual needs. This Act will most directly benefit them.

The proposed rules provide for requirements that will ensure that menstrual products are provided equitably. This means including dispenser requirements that are posted in at least two languages, are ADA compliant, and more. Similarly, the classroom and bathroom education must be provided that is affirming to all gender identities and is culturally responsive.

FISCAL ANALYSIS

What is the fiscal impact of the proposed rule changes to the Department of Education, school districts, education service districts or schools? Use the following suggestions as a guide:

1. How does the proposed rule fit within the budget of the agency?
 - a. Which units/divisions/offices will be impacted and how?

Oregon State Board of Education

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AGENDA ITEM: 3.B.

2. How does the proposed rule change impact school districts and ESDs?
3. How does the proposed rule change impact schools and other educational institutions?
4. Does the proposed rule change impact other stakeholders?

This Act includes a \$5,595,000 carve-out of the State School Fund. Each district will have a grant allocation based on their ADM. Then, districts will report their actual costs incurred for the program to the Department. Costs covered will include dispensers, installation, tampons, menstrual pads, and trash receptacles.

School districts may also face some additional costs not covered by this program, such as costs associated with menstrual health education and sexuality education.

EFFECT OF A "YES" OR "NO" VOTE

Explain the consequences of a Board approving or not approving the staff recommendation.

The effect of a 'yes' vote will be to support school districts implement this important legislation. Since this Act came into effect in July of 2021, school districts are looking to the rules for guidance and clarity.

The effect of a 'no' vote will be that school districts will have unmet implementation needs and questions as they navigate compliance with this legislation.

STAFF RECOMMENDATION

Approve Approve next month No recommendation at this time
Prompted by: State law changes Federal law changes other

ATTACHMENTS

Attachment 1: [ODE's Menstrual Dignity for Students Toolkit](#)

581-021-0600

Menstrual Dignity for Students: Definitions

The following definitions apply to OAR 581-021-0600 to 581-021-0609:

- (1) "Bathroom" means a space with a toilet, a sink, and a trash receptacle that is privately accessible to students. Bathrooms may be single stalled or an aggregation of individual toilet compartments, including in locker rooms.
- (2) "Dispenser" means a container sufficient to hold menstrual products and can include something installed on a wall or placed on a shelf.
- (3) "Products" means tampons and menstrual pads.
- (4) "Public school building" means a building used by a public education provider to provide educational services to students.
- (5) "Student bathroom" means a bathroom that is accessible by students, including a gender-neutral bathroom, a bathroom designated for females, and a bathroom designated for males.

Statutory/Other Authority: HB 3294 (2021)

Statutes/Other Implemented: HB 3294 (2021)

581-021-0603

Menstrual Dignity for Students: Requirements

- (1) All education providers shall install in every student bathroom:
 - (a) At least one dispenser that:
 - (A) Does not require inserting coins or money;
 - (B) Is clearly marked as free in at least two languages;
 - (C) Is ADA compliant;
 - (D) Is located in a place where all students can access products ~~privately~~; and
 - (E) Provides a variety of products with consideration of absorbency and size.

(2) Notwithstanding subsection (1), for the 2021-22 school year, all education providers shall stock and maintain menstrual product dispensers in at least two student bathrooms in each public school building. Education providers shall determine where to prioritize dispenser installation considering all-gender access to menstrual products and student privacy.

Statutory/Other Authority: HB 3294 (2021)

Statutes/Other Implemented: HB 3294 (2021)

[581-021-0606](#)

Menstrual Dignity for Students: Education

(1) All education providers shall provide health and sexuality education that ~~covers~~ includes information on menstrual health. The education must:

- (a) Be inclusive and affirming of transgender, non-binary, ~~and~~ intersex, and two spirit/indigiqueer students;
- (b) Be positive and nNot ~~be~~ fear- or shame-based;
- (c) Be age-appropriate;
- (d) Be medically-accurate;
- (e) Be culturally responsive; and
- (f) Be accessible for students with disabilities.

(2) All education providers shall provide and display menstrual product instructions ~~on how to use menstrual products~~ within the bathroom. The instructions must:

- (a) Be inclusive and affirming of transgender, non-binary, ~~and~~ intersex, and two spirit/indigiqueer students;
- (b) Be positive and nNot ~~be~~ fear- or shame-based;
- (c) Be age-appropriate;
- (d) Be medically-accurate.
- (e) Be culturally responsive; and
- (f) Be accessible for students with disabilities.

Statutory/Other Authority: ORS 326.051; HB 3294 (2021)

Statutes/Other Implemented: HB 3294 (2021)

[581-021-0609](#)

Menstrual Dignity for Students: Reimbursement Program

(1) The Department shall determine how much funding is available each year for eligible entities based on annual ADM and a 49/51 split of available funding. The Department shall use the most current finalized ADM from the State School Fund from the prior year.

(2) The following education providers are eligible to receive the menstrual product reimbursement:

- (a) School districts;
- (b) Public charter schools; and
- (c) Education service districts.

(3) Education providers shall electronically submit applications to the Department within the required timelines and on forms developed by the Department.

(4) Education providers shall be reimbursed for actual costs incurred. Actual costs incurred may include the following:

- (a) Products;
- (b) Dispensers; [and](#)
- (c) Installation costs.

[; and](#)

~~[\(d\) Trash receptacles.](#)~~

(5) Any unspent funds for the first year of the biennium shall be rolled ~~into forward and used in~~ the distribution of funds for the second year of the biennium. If the total amount to be distributed does not exceed the amount of available funding for the biennium, any remaining amount shall be redistributed to the State School Fund and reconciled in the payment process per ORS 327.095.

Statutory/Other Authority: HB 3294 (2021)

Statutes/Other Implemented: HB 3294 (2021)

Oregon State Board of Education

March 17, 2022

AGENDA ITEM: 3.C.

<p>SUBJECT: Vision Screening Reimbursements OAR 581-021-0031 STAFF NAME & OFFICE: Ely Sanders, Office of Enhancing Student Opportunities</p> <p>SB 222 (2021) expanded the list of reimbursable parties under the Vision Screening Reimbursement Program to include external vision screening providers.</p> <p><input type="checkbox"/> New Rule <input checked="" type="checkbox"/> Amend Existing Rule <input type="checkbox"/> Repeal Rule</p>	<p><input type="checkbox"/> First Reading <input type="checkbox"/> Presentation <input type="checkbox"/> No Presentation <input checked="" type="checkbox"/> Action <input type="checkbox"/> Temp Rule <input type="checkbox"/> Presentation <input checked="" type="checkbox"/> No Presentation</p>
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BACKGROUND

Include the following points for new OARs, OAR updates or changes.

1. History:
 - a. What prompted the rule (why do we have it?) State law? Federal law? Incident? Why are changes/amendments being proposed?
 - b. What is the current requirement in rule or statute?
 - c. Why is this rule being brought forward right now?
2. Purpose
 - a. What function does the current rule hold?
 - b. How long has the rule been in place?
3. Does the board have any areas of discretion or is this strictly mirroring statute?
 - a. If the board does have discretion, those areas should be called out here or in the next section.
4. Stakeholder voice/input (individual and collective i.e., groups)
 - a. Who was involved in bringing this to the Board?
 - b. What did engagement in this process entail?
 - c. Who may be affected by this?
 - d. Whose voice is missing?
 - e. What additional information does the Board need prior to moving forward?

This rule is being presented as a second read to the Board to reflect the 2021 changes included in SB 222 and is on the consent agenda. This new law expanded the parties eligible for reimbursement under the Vision Screening Reimbursement grant, from “educational institutions” to “persons”. As it currently is, OAR 581-021-0031 stipulates a process for reimbursing school districts for expenses incurred for providing vision screenings, which are usually provided by external vision screeners. OAR 581-021-0031 also describes a process for approving these external vision screeners to work in school settings. This amended OAR will allow these external vision screening providers to be reimbursed directly by ODE, rather than through a school district.

Oregon State Board of Education

March 17, 2022

AGENDA ITEM: 3.C.

SUMMARY OF PREVIOUS BOARD ACTION

1. Has this been before the board before? If so, what action did the board take?
Yes, the State Board voted to approve the temporary rules in the September 2021 meeting. The State Board then held a first read for these permanent rules in the January 2022 meeting.

HAS THE RULE CHANGED SINCE LAST BOARD MEETING?

- N/A; first read—hasn't been before board
- No; same as last month temporary rules presented in first read at the January Board meeting
- Yes – As follows:

POLICY ISSUE OR CONCERNS

These policy issues or concerns could be from the field, stakeholder groups, statements submitted during the comment period, or discussions among ODE staff. Consider the following questions:

1. Stakeholders
 - a. How have you intentionally involved stakeholders who are also members of communities affected by this rule?
 - b. Who are the historically underserved groups affected?
 - c. Has there been consultation or collaboration with tribes in this rule change or policy decision?
 - d. How has the Oregon Department of Education modified or enhanced the rule change or policy decision to address the needs of historically underserved communities?
2. Negative/Positive Effects
 - a. What is the impact on the population most affected by this rule that the board should consider?
 - b. What possible opportunities, assets or access could this rule provide?
 - c. What is the impact on eliminating the opportunity or achievement gap?
 - d. Have all the potential unintended consequences been considered?
 - e. Does this rule advance the ESSA goals?
3. What are the barriers to more equitable outcomes, either:
 - a. State or federally mandated?
 - b. Political?
 - c. Emotional?
 - d. Financial?
 - e. Programmatic?
 - f. Language?
 - g. Geography?
 - h. Size?

Oregon State Board of Education

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AGENDA ITEM: 3.C.

This change in statute came out of concerns from school districts and external vision screening providers that the process was overly cumbersome. Previously, the process usually looked like: a vision screener provided services in schools and then invoiced the district, and districts would submit a reimbursement form to ODE including required student and district information, they would claim their grant payment, and then pay off the screener's invoices. Some of these stakeholders would prefer the more direct option of reimbursing the approved providers directly.

Rule changes were presented at the February ODE RAC meeting. There were no questions, comments, or concerns.

EQUITY IMPACT ANALYSIS

The following questions are designed to examine how the proposed rule, policy or action systematically affect historically underserved students and/or communities.

1. How are historically underserved populations impacted by this docket item?
 - a. Demonstrate how the rule changes, policy, or action could produce other unintended consequences not listed in the docket.
 - b. Refer to *Policy Issue or Concerns* and identify the historically underserved populations affected. Conduct a reflection and examination, which will and should answer 1a.
2. Examine the impact of the rule changes, policy, or action on historically underserved populations in Oregon. Describe this ongoing and/or foreseeable impact, using as much detail as possible.
3. Explain how the rule change, policy or action works toward improving achievement, opportunities and a sense of worthiness for underserved students?

This program will continue to serve students with unaddressed vision needs and will continue to benefit students, especially those who are underserved and/or without health care access. Districts may find these options easier, which may mean that more students are served.

FISCAL ANALYSIS

What is the fiscal impact of the proposed rule changes to the Department of Education, school districts, education service districts or schools? Use the following suggestions as a guide:

1. How does the proposed rule fit within the budget of the agency?
 - a. Which units/divisions/offices will be impacted and how?
2. How does the proposed rule change impact school districts and ESDs?
3. How does the proposed rule change impact schools and other educational institutions?
4. Does the proposed rule change impact other stakeholders?

None.

Oregon State Board of Education

March 17, 2022

AGENDA ITEM: 3.C.

EFFECT OF A "YES" OR "NO" VOTE

Explain the consequences of a Board approving or not approving the staff recommendation.

A 'yes' vote would mean that districts will have a rule to reflect the change in statute.

A 'no' vote would mean that the current rule would not reflect the change in statute.

STAFF RECOMMENDATION

Approve Approve next month No recommendation at this time
Prompted by: State law changes Federal law changes other

ATTACHMENTS

Attachment 1: OAR 581-21-0031 Temporary Rules

581-021-0031
Vision Screening

(1) Definitions:

(a) "Education provider" means:

(A) Oregon prekindergarten as defined in OAR 581-019-0005 to 0035; and

(B) School district board as defined in ORS 332.002.

(b) "Eye examination" means an eye exam that:

(A) Is conducted by a person licensed by the Oregon Board of Optometry under ORS 683.010 to 683.340 a person licensed by the Oregon Medical Board under ORS 677 and trained in eye surgery and eye disease; and

(B) Involves any diagnosis of the eye and any measurement or assistance of the powers or range of vision of the eye.

(c) "Health care practitioner," for the purposes of this rule, means a Physician (MD), Physician's Assistant (PA), Doctor of Osteopathic Medicine (DO) licensed by the Oregon Medical Board, a Nurse Practitioner licensed by the Oregon State Board of Nursing, or a Naturopathic Physician licensed by the Board of Naturopathic Medicine.

(d) "Vision screening" means an eye screening test to identify potential vision health that is conducted by:

(A) A person licensed by the Oregon Board of Optometry under ORS 683.010 to 683.340;

(B) A person licensed by the Oregon Medical Board under ORS 677 and trained in eye surgery and eye disease;

(C) A health care practitioner as defined in section (1)(c) of this rule;

(D) A school nurse, a licensed Registered Nurse or Nurse Practitioner working for a school district to provide school health services, or an employee of an education provider who has successfully completed training on vision screening that is provided by a school nurse or, a licensed Registered Nurse or Nurse Practitioner working for a school district to provide school health services ; or

(E) An organization that has been approved to provide vision screenings by the Department as provided in subsection (6) of this rule.

(e) "Vision Health Record," for the purposes of this rule, has the same meaning as "Education Records" in OAR 581-021-0220(6).

(2) Each education provider must:

(a) Require a student who is age seven or younger and entering an educational program for the first time to submit certification within 120 days of the student beginning school, that the student received:

(A) A vision screening or an eye examination; and

(B) Any further eye examinations or necessary treatments or assistance of the powers or range of vision of the eye.

(b) If a child enters an educational program without certification of vision screening, provide the parent with informational resources about:

(A) Student vision screenings and eye examinations; and

(B) Any further examinations or necessary eye or vision treatments.

(c) File in the student's vision health record any certifications or results of vision screening or eye examination;

(d) Ensure that the requirements of this rule are met.

(3) A student is not required to submit certification required in subsection (2) of this rule if the student provides a statement from the parent of the child that:

(a) The student submitted certification to a prior education provider; or

(b) The student's or parent's religious beliefs are contrary to vision screening or eye examination.

(4) Failure by a student or parent to meet the requirements of this rule may not result in prohibiting the student from attending school, but may result in withholding report cards or similar actions.

(5) Certification of a vision screening or eye exam is documented using any written communication method selected by the screening entity to report results of the screening and/or eye exam to parents. The communication must include the:

(a) Child's name;

(b) Vision screening and/or eye examination date;

(c) Results of the screening and/or eye exam; and

(d) Name of the entity conducting the screening and/or eye exam.

(6) The Oregon Department of Education shall annually develop a list of organizations that are approved to perform vision screenings.

(a) The Department will post a Request for Information no later than March 31 of each year. The Request for Information will remain posted through June 30 of that calendar year. The Department will review and approve applications on a rolling basis, beginning as early as January 1 of each year and concluding July 31 of that calendar year.

(b) The Department will convene an advisory group to review applications and make recommendations to the Department. The advisory group will include:

(A) Representatives from the field of optometry and ophthalmology who have expertise in vision screening and experience in pediatric vision care;

(B) Representatives from the field of school health;

(C) Representatives from organizations that provide pediatric vision screening including at least one representative from a culturally specific organization.

(c) To be included on the list of approved organizations,

(A) The organization must instruct all volunteers on how to perform vision screening using an established program which is evidence-based and uses medically accepted standards for screening by non-medically licensed persons, including volunteers;

(B) The organization must demonstrate compliance with the Family Educational Rights and Privacy Act of 1974 (FERPA); and

(C) The organization must use a vision screening method or tool that is designed to detect Hyperopia, Astigmatism, Anisometropia, Myopia, Strabismus, and Amblyopia.

(d) Once an organization has been approved by the Department, the organization may remain on the list for a period of three years.

(7) For each biennium that the Legislature appropriates money to the Department for the purpose of reimbursing education providers or an organization that has been approved to provide vision screenings by the Department as provided in subsection (6) of this rule for vision screening, the Department will administer reimbursements to education providers or an

organization that has been approved to provide vision screenings by the Department as provided in subsection (6) of this rule. The Department shall administer the reimbursements as follows:

(a) Each biennium the Department will determine the amount of money available for reimbursement in a given year by dividing the total funds available for that biennium in half.

(b) Reimbursements will be made for vision screenings as defined in this rule.

(c) In the event that claims for reimbursement exceed the amount for available for a given year, the Department will prioritize claims for reimbursement as follows:

(A) Claims for reimbursement for pre-kindergarten programs and grades kindergarten through grade 3 shall be paid in full first. If the approved claims submitted for prekindergarten and grades K-3 exceed the amount available in a given year, the reimbursement shall be divided equally among the approved claims.

(B) Claims for reimbursement for students in grades 4-12 shall be paid from any remaining funds. Priority will be given to claims submitted by schools that serve the highest percentage of students experiencing poverty.

Oregon State Board of Education

March 17, 2022

AGENDA ITEM: Access to Linguistic Inclusion (HB 2056)

<p>SUBJECT: Access to Linguistic Inclusion (HB 2056) / OARs 581-002-0200, 581-021-0200, 581-022-0102, 581-021-0580, 581-022-2000, 581-022-2010, 581-022-2015, 581-022-2030, and 581-026-0300</p> <p>STAFF NAME & OFFICE: Tina Roberts, Ben Wolcott, Alexa Pearson (Office of Teaching, Learning, and Assessment)</p> <p>The 2021 legislature passed Access to Linguistic Inclusion (HB 2056), which makes changes to nine Oregon Revised Statutes and repeals one. ODE is proposing changes to Oregon Administrative Rules associated with these changed statutes, so that the OARs align with their “partner” statutes. There have been no additional revisions since our First Read in December 2021.</p> <p><input type="checkbox"/> New Rule <input checked="" type="checkbox"/> Amend Existing Rule <input type="checkbox"/> Repeal Rule</p>	<p><input checked="" type="checkbox"/> Second Reading <input checked="" type="checkbox"/> Presentation <input type="checkbox"/> No Presentation <input type="checkbox"/> Action <input type="checkbox"/> Temp Rule <input type="checkbox"/> Presentation <input type="checkbox"/> No Presentation</p>
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BACKGROUND

Access to Linguistic Inclusion (also known as HB 2056) was sponsored by ODE and passed in the 2021 legislative session. It took effect January 1, 2022. This law has three main effects:

- It changes the name and definition of “English language arts” in multiple Oregon Revised Statutes. Most of the proposed OAR changes relate to this first effect.
- It changes the definition of World Language in multiple Oregon Revised Statutes. Two of the OAR changes relate to this second effect.
- It repeals ORS 336.074 (which mandated nearly all instruction in Oregon be conducted in English). No proposed OAR changes relate to this third effect.

The proposed OAR changes focus on high school instruction and high school credit accrual.

Access to Linguistic Inclusion (HB 2056) modifies nine Oregon Revised Statutes and repeals one. ODE is proposing changes to nine Oregon Administrative Rules that mirror the Oregon Revised Statutes that have been changed by Access to Linguistic Inclusion.

- In six of these rules, the change is removing the word “English” from the phrase “English Language Arts”. One rule also includes replacing the phrase “second language” with “World Language.”
- In three rules, ODE is either adding definitions for the phrases “Language Arts” and “World Language” or modifying existing definitions to match the new definitions of Access to Linguistic Inclusion.

The proposed revisions apply the exact language of the Access to Linguistic Inclusion Bill (HB 2056) to the relevant OARs. These changes strictly mirror statute. The table below outlines the specific changes to each of the nine rules:

Oregon State Board of Education
March 17, 2022

AGENDA ITEM: Access to Linguistic Inclusion (HB 2056)

Rule number	Rule title and history	Rule purpose and proposed change
581-002-0200	Class Size Collection Introduced: 2014 (no subsequent revisions)	Rule purpose: Lists the names of content areas for which class size data are collected. Change: English Language Arts (Reading or Language Arts) → Language Arts (including Reading, Writing, and Literature); minor grammatical corrections
581-021-0200	Standard Education for Oregon Students Introduced: 1991 Subsequent revisions: 2 Most recent revision: 2008	Rule purpose: Lists courses/content areas provided by schools and districts. Change: English Language Arts → Language Arts
581-022-2015	Extended Diploma Introduced: 2009 Subsequent revisions: 7 Most recent revision: 2018	Rule purpose: Specifies how many and what kind of credits are required to earn an extended high school diploma. Change: English → Language Arts; Second language → World language; minor grammatical corrections
581-022-0102	Definitions Introduced: 1980 Subsequent revisions: 11 Most recent revision: 2018	Rule purpose: Repeats ORS definitions for “English Language Arts” and “World Language”. These definitions are used in other rules. Change: Added definition for Language Arts and World Language
581-022-2000	Diploma Requirements Introduced: 1997 Subsequent revisions: 10 Most recent revision: 2018	Rule purpose: Specifies how many and what kind of credits are required to earn a standard high school diploma. Change: (Section 6) English Language Arts → Language Arts
581-022-2010	Modified Diploma Introduced: 2008 Subsequent revisions: 5 Most recent revision: 2017	Rule purpose: Specifies how many and what kind of credits are required to earn a modified high school diploma. Change: English Language Arts → Language Arts
581-022-2030	District Curriculum Introduced: 1997 Subsequent revisions: 9 Most recent revision: 2018	Rule purpose: Lists courses/content areas provided by districts. Change: English → Language Arts
581-026-0300	Virtual Public Charter Schools	Rule purpose: Lists courses/content areas provided by

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	Introduced: 2010 Subsequent revisions: 2 Most recent revision: 2020	virtual public charter schools. Change: English language arts → Language Arts
581-021-0580	Definitions Introduced: 2016 (no subsequent revisions)	Rule purpose: Repeats ORS definition for “World Language”. This definition is used in other rules. Change: Updated definition of World Language

Potential Impact of OAR Revisions

Districts may see an increase in their ability to:

- Recognize and honor student achievement
- Provide instruction in languages other than English
- Transfer high school credit from international transcripts
- Award credit for high school coursework

Students may see an increase in their ability to:

- Obtain recognition and honor for demonstrated knowledge and skills
- Participate in a wider range of courses during their high school career
- Overcome barriers in their pathway to graduation
- Earn high school credit for coursework done in languages other than English

SUMMARY OF PREVIOUS BOARD ACTION

At our First Read, Director Scurlock asked if the changes created by the passage of Access to Linguistic inclusion would make it possible for a student to graduate from high school having never taken an English Language Arts class but through accumulating credits from language arts classes in languages other than English. In response, we indicated that yes, that technically would be possible; however, it is unlikely. Since receiving Director Scurlock’s question, ODE has written a [Guidance and Explanation document](#) that includes the following section on page 3, regarding how to the need for schools/districts to incorporate the students’ [Education Plan and Profile](#) when making determinations about credit awarding.

“As part of Oregon’s graduation requirements, which predate Access to Linguistic Inclusion, each student shall develop an Education Plan and Profile, which includes planning course taking and planning for post-secondary transitions. Schools must consider this Education Plan and Profile when making decisions regarding whether and how Access to Linguistic Inclusion might be applied to help individual students meet graduation requirements and attain their post-secondary goals. While the intent of Access to Linguistic Inclusion is to remove structural barriers to high school graduation, it is also important that schools support students and families in understanding that the course requirements that post-secondary institutions apply during the admissions process may continue to emphasize course completion in the English language.

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For example, some university admissions require four years of “English.” Additionally, students who are found to be insufficiently prepared for university-level English (in terms of language or in terms of academic composition) may be required to take remedial English courses. If the student is considering college-level athletics, they will also want to consider National Collegiate Athletic Association (NCAA) rules to ensure the transcript aligns with the course requirements of NCAA. Therefore, in considering when and where to apply flexibilities available under Access to Linguistic Inclusion, districts should take care not to close off opportunities while opening others.”

Commented [MC*01]: Sending them to a six page doc to search for the reply is asking the reader to do too much. That's why I included it here.

HAS THE RULE CHANGED SINCE LAST BOARD MEETING?

- N/A; first read—hasn't been before board
X No; same as last month
 Yes – As follows:

POLICY ISSUE OR CONCERNS

ODE engaged with external partners at all levels from the classroom to the State both prior to OAR revision (confirming legislative intent and potential effects on various education-related groups), during OAR revisions (notifying and confirming changes to rule), and after OAR revisions (developing guidance and communication).

ODE engaged the following groups in review of the proposed OAR changes:

- Oregon Education Association (OEA)
- Teacher Standards and Practices Commission (TSPC)
- Higher Education Coordinating Commission (HECC)
- Coalition in Oregon for Language Teaching (COFLT)
- Education Northwest (REL NW)
- Rules Advisory Committee (RAC)

ODE also invited policy development input from the following:

- District personnel who work with multilingual students, including
 - Building administrators
 - Counselors
 - English Language Development and World Language teachers
- The English Learner Advisory Group
- The Elementary Literacy Coaches Network and Secondary Literacy Coaches Network
- The Office of Indian Education at ODE

Policy Impacts

The rules themselves have little direct impact on students; they are mostly label changing. However, the new definitions associated with these label changes broaden opportunities for districts to offer more kinds of instruction and recognize student achievement, as well as broadening opportunities for multilingual students to earn high school credit (and consequently increasing opportunities for course

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taking). The precise effects of these new definitions has been elaborated in [accompanying guidance](#), which has been posted on the [ODE website](#).

For example, prior to this law, a student who immigrated to Oregon part way through their high school career would still need to complete four credits of Language Arts focusing on English language and literature. Language arts courses taken in their school of origin would not count towards this requirement, unless they had focused on English literature and composition. Because such students would need to complete several years of additional high school English Language Arts courses in one or two years of schooling, obtaining a timely Oregon high school diploma was difficult or impossible. Under Access to Linguistic Inclusion (HB 2056), Language Arts diploma requirements may be satisfied by Language Arts courses in any language, not only English.

EQUITY IMPACT ANALYSIS

Expected benefits for students

In addition to the explanations given above, Access to Linguistic Inclusion (HB 2056) augments credit opportunities and diploma access for multilingual/multicultural students across Oregon. This includes students who are migrants, immigrants, or who have (or formerly had) EL status. It also includes students with indigenous backgrounds.

Under the new definitions put in place through Access to Linguistic Inclusion (HB 2056), students may now earn official recognition, in the form of high school Language Arts and World Language credits, for an expanded range of coursework. For students whose primary language is not English, it will be possible to earn World Language credit for work done in English. Because student work must still satisfy Oregon's adopted standards for the content area in question, this recognition is not simply "handing out" credits, but authentic honoring of real student knowledge and skills.

For many of these students, additional credit opportunities will potentially free up space in their schedules to include more course offerings.

Potential barriers to equitable outcomes

- The decision to implement new flexibilities lies at the district level. Some districts may decide to offer new credit options, while others may not.
- Districts wishing to offer classes in languages other than English would need to assume additional costs in terms of purchasing additional instructional materials, and hiring bilingual staff.
- Access to Linguistic Inclusion (HB 2056) may be misperceived as an attempt to "erase" or remove English from the Oregon educational system. This misperception may cause some districts or schools not to take advantage of additional flexibility granted by the law.

FISCAL ANALYSIS

These rule changes will have minimal to no financial impact on the state, districts, or third parties. Schools or districts who decide to offer courses in languages other than English may incur costs in terms

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of instructional materials and personnel. Districts who decide to change course labels or offerings may need to allocate staff time to make changes to data systems such as transcript programs.

EFFECT OF A "YES" OR "NO" VOTE

Yes vote: The listed OARs will be brought into alignment with changes mandated by Access to Linguistic Inclusion (HB 2056).

No vote: The listed OARs will retain previous labels and definitions for Language Arts and World Language, which will leave them in conflict with ORS changes mandated by Access to Linguistic Inclusion (HB 2056).

STAFF RECOMMENDATION

Approve Approve next month No recommendation at this time

Prompted by: State law changes Federal law changes other

ATTACHMENTS

Attachment 1:

Amended Text

581-002-0200

Class Size Collection

(1) As used in this rule:

(a) “Class” means a setting in which organized instruction of academic course content is provided to one or more students (including cross-age groupings) for a given period of time. A course may be offered to more than one class. Class instruction, provided by one or more teachers or other staff members, may be delivered in person or via a different medium.

(b) “Regular assignment of a teacher” means a teacher who consistently teaches a group of students in an elementary self-contained classroom or group(s) of students in a secondary classroom in academic subject area(s) over a given period of time.

(2) Beginning with the 2014–2015 school year, the Department of Education shall require public education programs to submit information as required by ORS 329.901 and this rule for the following categories of classes as identified based on the grade levels of the school:

(a) Elementary schools (any combination of grades Kindergarten through 8): Homeroom (Self-Contained)

(b) Secondary schools (any combination of grades 6 through 12) by academic subject area:

(A) ~~English Language Arts (Reading or Language Arts);~~ Language Arts (including Reading, Writing, and Literature);

(B) Mathematics;

(C) Science;

(D) Social Studies (Civics, History, Government, Economics, Geography);

(E) World Language and Literature; and

(F) Fine and Performing Arts.

(3) The Department shall utilize existing institution, staff and student data collections to collect the information required by ORS 329.901 and this rule.

(4) The Department shall provide a technical manual to public education programs that will be used to determine class size.

Amended Text

581-021-0200

Standard Education for Oregon Students

A Standard Education for Oregon Students is comprised of:

(1) Common Curriculum Goals. The Common Curriculum Goals consist of:

(a) Essential Learning Skills. The Essential Learning Skills are those skills essential to learning and necessary for understanding in the subject matter areas. The skills are: Reading, writing, speaking, listening, mathematics, reasoning and study skills;

(b) Common Knowledge and Skills. The Common Knowledge and Skills consists of facts, concepts, principles, rules, procedures and methods of inquiry associated with the following subject matter areas:

(A) ~~English~~-Language Arts;

(B) Mathematics;

(C) Health Education;

(D) Science Education;

(E) Physical Education;

(F) Social Studies;

(G) Music;

(H) Art;

(I) Personal Finance;

(J) Second Language and Culture (proposed);

(K) Career Education.

(2) Professional — Technical Education. Occupational preparation which blends the interests and aptitudes of students with the skills and experience needed to become employed, sustain economic independence and enter advanced education and training.

(3) Education Programs Mandated by State or Federal Law and Selected Other State Requirements Presently Constituted:

(a) The approximately 30 programs mandated by state statutes are in two categories, instruction and support. They include a diverse range of requirements such as protection of trees and shrubs, commemorating women in history, providing free textbooks, programs for talented and gifted students, transportation and properly maintained buildings and grounds;

(b) The three federally mandated programs are: The Asbestos Hazard Emergency Act of 1986, as amended; The Individuals With Disabilities Act, PL 101-476, that all children with disabilities have an opportunity for a free appropriate public education; The Family Education Rights and Privacy Act, PL 93-380, as amended by PL 93-568, that imposes certain requirements and restrictions on the release of student records;

(c) The following state requirements contained in OAR chapter 581, division 022:

(A) Goals for Elementary and Secondary Education;

(B) Graduation Requirements;

(C) Education of Talented and Gifted;

(D) Required Days of Instruction;

(E) Required Instructional Time;

(F) Kindergarten Programs;

(G) Standardization;

(H) Alternative Education Program;

(I) Special Education Program;

(J) Library Media Skills Instruction.

(4) Character Education. Character Education is the process of helping students develop and practice the core ethical values that our diverse society shares and holds important. These values include, but are not limited to, respect, responsibility, caring, trustworthiness, justice and fairness, and civic virtue and citizenship.

(5) Student Activities under the auspices of the secondary schools, which include the following:

(a) Student Government;

(b) Preparation of School Publications; e.g., newspaper, yearbook, literary magazine;

(c) Drama;

(d) Performing Music/Dance Groups;

(e) Interscholastic Athletics;

(f) Intramurals;

(g) Rally Squad/Dance Team/Flag Line;

(h) Competitive Speech and Debate;

(i) Instruction program-related clubs or organizations; e.g., Distributive Education Club of America, Future Business Leaders of America, Future Farmers of America, Home Economics Related Occupations, Vocational Industrial Clubs of America.

(6) International Understanding. International Understanding represents the knowledge, skills and attitudes needed to live effectively in a world possessing limited natural resources and characterized by ethnic diversity, cultural pluralism and an increased interdependence. Such knowledge, skills and attitudes are developed through broad exposure to international content in all subject areas and through learning a second language.

(7) Support Services Necessary to Provide a Standard Education for Oregon Students:

(a) Student Services:

(A) Improving attendance;

(B) Counseling;

(C) Providing health services;

(D) Treating students with speech and hearing disabilities;

(E) Providing library, audio/video, television and computer learning.

(b) Staff Services:

(A) Measuring student achievement;

(B) Developing curriculum and training staff.

(c) Administrative Services:

(A) Administering the district and individual schools;

(B) Planning, research, processing of data.

(d) Business Services:

(A) Budgeting, payroll, inventory, internal audit;

(B) Buying and storing of supplies;

(C) Printing.

(e) Transportation Services:

(A) Providing home-to-school transportation for both students with and students without disabilities;

(B) Transporting students to co-curricular activities.

(f) Food Services: Offering students nutritional lunches and breakfasts;

(g) Operation and Maintenance Services: Keeping buildings, equipment and grounds safe, working and in good condition.

Amended Text

581-021-0580

School Governance and Student Conduct

Definitions

The following definitions apply to OAR 581-021-0580 to 581-0021-0584:

- (1) "Assessment" means any of the measurements identified by the Department of Education and used to determine target language proficiency.
- (2) "Biliteracy" means the ability to demonstrate a high level of proficiency in reading, writing, listening, and speaking in English and one or more world languages.
- (3) "Oregon State Seal of Biliteracy" means a seal issued by the Superintendent of Public Instruction that certifies a student is biliterate in English and one or more world languages.
- (4) "Portfolio of evidence" means the body of work collected to demonstrate a high level of Biliteracy proficiency
- (5) **"World language" is defined in ORS 329.007 and means sign language, heritage language and languages other than a student's primary language.** ~~"World language" means American Sign Language and languages other than English.~~

Amended Text

581-022-0102

Definitions

The following definitions apply to Oregon Administrative Rules 581-022-0102 through 581-022-1940, unless otherwise indicated by context:

(1) "Assessment": Systematic gathering of data with the purpose of appraising and evaluating children's social, physical, emotional, and intellectual development. Activities may include testing to obtain and organize information on student performance in specific subject areas.

(2) Career and Technical Education: A sequence of organized educational activities that:

(a) Provides individuals with coherent and rigorous content aligned with challenging academic standards and relevant technical knowledge and skills needed to prepare for further education and careers;

(b) Provides technical skill proficiency and may provide an industry-recognized credential, a certificate or an advanced degree; and

(c) Includes applied learning that contributes to an individual's academic and technical knowledge, higher-order reasoning and problem-solving skills, work attitudes and general employability skills.

(3) "Career Development": The exploration of personal interests and abilities with regard to career selection, and the development of tentative career goals.

(4) "Career Education": A process for improving educational programs to enhance student understanding of and preparation for work and continuing career development.

(5) "Career-Related Learning Experiences": Structured student activities in the community, the workplace, or in school that connect academic content and career-related learning to real life applications. These experiences extend, reinforce and support classroom learning. They include, but are not limited to:

(a) Workplace mentoring;

(b) Workplace simulations;

(c) School-based enterprises;

(d) Structured work experiences;

(e) Cooperative work and study programs;

(f) On-the-job training;

- (g) Apprenticeship programs;
 - (h) Service learning; and
 - (i) Field-based investigations.
- (6) "Charter school": A public charter school as defined in ORS 338.005.
- (7) "Child development specialist program": An optional elementary component of a district's comprehensive school counseling program for grades K-8 (or any configuration thereof).
- (8) "Collection of Evidence": The work of a student collected and evaluated together to measure the student's ability to apply what the student knows and can do in relation to a set of standards or criteria.
- (9) "Common Curriculum Goals": The knowledge and skills expected of all students as a result of their educational experience; defined by the state as:
- (a) The Essential Learning Skills which means essential skills as defined by this rule; and
 - (b) The Common Knowledge and Skills in instructional programs as adopted by the State Board of Education.
- (10) "Common Knowledge and Skills in Instructional Programs": Facts, concepts, principles, rules, procedures and methods of inquiry associated with specific subject matter areas as adopted by the State Board of Education.
- (11) "Common School District": A school district other than a union high school district formed primarily to provide education in all or part of grades K through 12 to pupils residing within the district (ORS 330.005(2)(b)). See section (20) of this rule.
- (12) "Community Partnerships": Collaborations to network resources to assist students to meet state and local standards and prepare students for post high school transitions. These partnerships include parents, students, business, education, government and community-based organizations.
- (13) "Compliance Indicator": Statement of the action taken by a local district which can be accepted as evidence that the district is in compliance with the intent of a particular state standard.
- (14) "Comprehensive school counseling program": A program that is integral to a district's total PreK through 12 educational program that is planned, proactive and preventative in design to address each student's academic, career, social/emotional development and community involvement.
- (15) "Conditionally Standard School": A school that fails to meet the standards but has submitted a plan of correction, approved by the district school board, to the State Superintendent.

(16) "Course Goals": Statements describing the knowledge and skills students are expected to acquire as a result of having completed a course, elementary unit, or grade level.

(17) "Diploma": The document issued by school districts and charter schools in accordance with OAR 581-022-1130 or 581-022-1134.

(18) "District": A common or union high school district (ORS 332.002(2)).

(19) "District Goals": Statements related to State Board of Education goals (OAR 581-022-1030) which describe the local district and community's expectations for student learning.

(20) "District School Board": The board of directors of a common school district or a union high school district (ORS 332.002(1)).

(21) "Education Plan": A formalized plan and process in which a student identifies their academic, personal and career interests which helps the student to connect school activities with their post-high school goals.

(22) "Education Profile": Documentation of a student's academic achievement and progress toward their graduation requirements, post-high school goals and other personal accomplishments identified in their education plan.

(23) "Education Record": has the same meaning as in OAR 581-021-0220.

(24) "Elementary School": Any combination of grades K through 8.

(25) "Essential Skills": Process skills that cross academic disciplines and are embedded in the content standards. The skills are not content specific and can be applied in a variety of courses, subjects, and settings. The essential skills include: Read and comprehend a variety of text; Write clearly and accurately; Listen actively and speak clearly and coherently; Apply mathematics in a variety of settings; Think critically and analytically; Use technology to learn, live, and work; Demonstrate civic and community engagement; Demonstrate global literacy; and Demonstrate personal management and teamwork skills.

(26) "Extended Application Standard": The application and extension of knowledge and skills in new and complex situations related to the student's personal and career interests and post-high school goals.

(27) "Global Studies": An area of study for learning about the people and cultures of the world through history, geography and other social studies disciplines.

(28) "High School": Any combination of grades 10 through 12 in districts providing a junior high school containing grade 9; any combination of grades 9 through 12 organized as a separate unit; grades 9 through 12 housed with grades K through 12; grades 7 or 8 through 12, if approved by the Oregon Department of Education.

(29) "Identification Team" referred to as the "Team": A team of at least two district staff who carry out district identification procedures and determine the identification of students under OAR 581-022-1310.

(30)(a) "Instructional time" means time during which students are engaged in regularly scheduled instruction, learning activities, or learning assessments that are designed to meet Common Curriculum Goals and academic content standards required by OAR 581-022-2030, and are working under the direction and supervision of a licensed or registered teacher, licensed CTE instructor, licensed practitioner, or Educational Assistant who is assigned instructionally related activities and is working under the supervision of a licensed or registered teacher as required by OAR 581-037-0015.

(b) Instructional time shall include:

(A) Time that a student spends traveling between the student's school and a CTE center, internship, work experience site, or post-secondary education facility;

(B) Time that a student spends in statewide performance assessments; and

(C) Up to fifteen minutes each day of the time that a student spends consuming breakfast in the classroom if instruction is being provided while the student is consuming breakfast.

(c) Instructional time shall not include time that a student spends passing between classes, at recess, in non-academic assemblies, on non-academic fieldtrips, participating in optional school programs, or in study periods or advisory periods where attendance is not required and no instructional assistance is provided.

(31) "Junior High School": A secondary school composed of one or more of grades 7, 8, and 9 organized separately from other grades and approved by the Oregon Department of Education.

(32) "Kindergarten": A planned program that provides activities designed to foster the physical, social, emotional, and cognitive development of young children (ORS 336.092 and 336.095).

(33) "Language Arts": reading, writing and other communications in any language, including English, as defined in ORS 329.007.

(34)(33) "Middle School": An organizational unit composed of any combination of grades 5, 6, 7, and 8 organized separately from other elementary grades and identified as a middle school with the Oregon Department of Education.

(35)(34) "Next steps": The education and/or career choices students make after leaving high school, which may include the workforce, community colleges, four-year colleges and universities, private career schools, apprenticeships, and the military.

~~(36)~~~~(35)~~ "Nonstandard School": A school which fails to meet the standards, and which within ninety days of the State Superintendent's notification of deficiencies, fails to submit a plan of correction or adhere to a plan of correction approved by the State Superintendent (ORS 327.103).

~~(37)~~~~(36)~~ "Parent": Has the same definition as in Oregon Revised Statute 343.035.

~~(38)~~~~(37)~~ "Planned Course Statement": Course title, course overview, course goals (including essential learning skills, career-related goals and common curriculum goals as set forth in OARs 581-022-2030) and, where appropriate, graduation competence assigned to the course for verification.

~~(39)~~~~(38)~~ "Potential": As used in OAR 581-022-1310, the demonstrated capacity to perform at or above the 97th percentile as determined by the team.

~~(40)~~~~(39)~~ "Program": A planned series of interrelated activities or services contributing to the attainment of a goal or set of goals.

~~(41)~~~~(40)~~ "Program Evaluation": A process for making judgments about the philosophy, goals, methods, materials and outcomes of a program to guide program improvement.

~~(42)~~~~(41)~~ "Program Goals" (instructional): Statements describing what students are expected to learn in each district instructional program in any combination of grades K through 12.

~~(43)~~~~(42)~~ "Program Goals" (support): Statements describing program outcomes which support the entire learning system, or one or more of its components, usually stated in terms of services to be performed.

~~(44)~~~~(43)~~ "Program Needs Identification": Procedures, which specify and rank the differences between actual and desired outcomes leading to the consideration of program revision.

~~(45)~~~~(44)~~ "School District": A common or union high school district (ORS 332.002). For the purposes of OARs 581-022-0403, 581-022-1310, 581-022-1320 and 581-022 1330, school district has the same meaning as in Oregon Revised Statute 343.395.

~~(46)~~~~(45)~~ "Standard School": A school, which is in compliance with all of the standards.

~~(47)~~~~(46)~~ "State Standards": State Board division 22 Administrative Rules for public elementary and secondary schools.

~~(48)~~~~(47)~~ "Student Activity Funds": All money raised or collected by and/or for school-approved student groups, excluding money budgeted in the general fund.

~~(49)~~~~(48)~~ "Talented and Gifted Students": Those children defined in Oregon Revised Statute 343.395.

~~(50)~~~~(49)~~ "Union High School District": A school district, other than a common school district, formed in accordance with ORS 335.210 to 335.485 (330.005).

(51) “World Language”: sign language, heritage language and languages other than a student's primary language, as defined in ORS 329.007.

Amended Text

581-022-2000

Diploma Requirements

(1) Each district school board and public charter school with jurisdiction over high school programs shall award diplomas to all students who fulfill all state requirements as described in sections (2) to (11) of this rule and all local school district requirements as described in district school board policies or all public charter school requirements as described in the policies or charter of the public charter school.

(2) Unit of Credit Requirements for students graduating before July 1, 2009:

(a) Each student shall earn a minimum of 22 units of credit to include at least:

(A) English Language Arts — 3 (shall include the equivalent of one unit in Written Composition);

(B) Mathematics — 2;

(C) Science — 2;

(D) Social Sciences 3 — (including history, civics, geography and economics (including personal finance));

(E) Health Education — 1;

(F) Physical Education — 1;

(G) Career and Technical Education, The Arts or World Languages — 1 (one unit shall be earned in any one or a combination).

(b) A district school board or public charter school with a three-year high school may submit through the waiver process alternative plans to meet unit requirements;

(c) A district school board or public charter school may increase the number of units required in specific areas, and may increase or decrease the number of elective units; however, the total units of credit required for graduation shall not be less than 22;

(d) A school district or public charter school may grant high school credit for courses taken prior to grade 9 if students taking pre-grade 9 courses are required to meet performance criteria that are equivalent to the performance criteria for students taking the same high school courses;

(e) Course syllabi shall be written for courses in grades 9 through 12 and shall be available to students, staff, parents, the district school board and other interested individuals.

(3) Except as provided in section (4) of this rule, Unit of Credit Requirements for students graduating on or after July 1, 2009 and who were first enrolled in grade 9 prior to the 2008–2009 school year:

(a) Each student shall earn a minimum of 24 units of credit to include at least:

(A) English Language Arts — 4 (shall include the equivalent of one unit in Written Composition);

(B) Mathematics — 3;

(C) Science — 2;

(D) Social Sciences 3 — (including history, civics, geography and economics (including personal finance));

(E) Health Education — 1;

(F) Physical Education — 1;

(G) Career and Technical Education, The Arts or World Languages — 1 (one unit shall be earned in any one or a combination).

(b) A district school board or public charter school with a three-year high school may submit through the waiver process alternative plans to meet unit requirements;

(c) A district school board or public charter school may increase the number of units required in specific areas, and may increase or decrease the number of elective units; however, the total units of credit required for graduation shall not be less than 24;

(d) A school district or public charter school may grant high school credit for courses taken prior to grade 9 if students taking pre-grade 9 courses are required to meet performance criteria that are equivalent to the performance criteria for students taking the same high school courses;

(e) Course syllabi shall be written for courses in grades 9 through 12 and shall be available to students, staff, parents, the district school board and other interested individuals.

(4) Notwithstanding sections (2) and (3) of this rule, for students who began grade 9 during the 2005–2006 school year and who attended school during the 2006–2007, 2007–2008 and 2008–2009 school years, the unit of credits required for graduating is as described in section (2) of this rule if the student graduates prior to July 1, 2010.

(5) Unit of Credit Requirements for students who were first enrolled in grade 9 during the 2008–2009 or 2009–2010 school year:

(a) Each student shall earn a minimum of 24 units of credit to include at least:

(A) English Language Arts — 4 (shall include the equivalent of one unit in Written Composition);

(B) Mathematics — 3;

(C) Science — 3;

(D) Social Sciences 3 — (including history, civics, geography and economics (including personal finance));

(E) Health Education — 1;

(F) Physical Education — 1;

(G) Career and Technical Education, The Arts or World Languages — 3 (units shall be earned in any one or a combination).

(b) A district school board or public charter school with a three-year high school may submit through the waiver process alternative plans to meet unit requirements;

(c) A district school board or public charter school may increase the number of units required in specific areas, and may increase or decrease the number of elective units; however, the total units of credit required for graduation shall not be less than 24;

(d) A district school or public charter school may grant high school credit for courses taken prior to grade 9 if students taking pre-grade 9 courses are required to meet performance criteria that are equivalent to the performance criteria for students taking the same high school courses;

(e) Course syllabi shall be written for courses in grades 9 through 12 and shall be available to students, staff, parents, the district school board and other interested individuals.

(6) Unit of Credit Requirements for students who were first enrolled in grade 9 during the 2010–2011 school year or first enrolled in grade 9 in any subsequent school year:

(a) Each student shall earn a minimum of 24 units of credit to include at least:

(A) ~~English~~-Language Arts — 4 (shall include the equivalent of one unit in Written Composition);

(B) Mathematics —3 (shall include one unit at the Algebra I level and two units that are at a level higher than Algebra I);

(C) Science — 3;

(D) Social Sciences 3 — (including history, civics, geography and economics (including personal finance));

(E) Health Education — 1;

(F) Physical Education — 1;

(G) Career and Technical Education, The Arts or World Languages — 3 (units shall be earned in any one or a combination).

(b) A district school board or public charter school with a three-year high school may submit through the waiver process alternative plans to meet unit requirements;

(c) A district school board or public charter school may increase the number of units required in specific areas, and may increase or decrease the number of elective units; however, the total units of credit required for graduation shall not be less than 24;

(d) A district school board or public charter school must waive any additional district requirements if students are or, were at any time from grade 9-12:

(A) A foster child, a child receiving 24-hour substitute care for children placed away from their parents or guardians and for whom the child welfare agency has placement and care responsibility. This includes, but is not limited to, placements in foster family homes, foster homes of relatives, group homes, emergency shelters, residential facilities, child care institutions, and pre-adoptive homes. A child is in foster care in accordance with this definition if the foster care facility is licensed and payments are made by the State, Tribal or local agency for the care of the child, whether adoption subsidy payments are being made prior to the finalization of an adoption, or whether there is Federal matching of any payments that are made;

(B) Homeless, a child who lacks a fixed, regular, and adequate nighttime residence; a child who is sharing the housing of other persons due to loss of housing, economic hardship, or a similar reason; is living in motels, hotels, trailer parks, or camping grounds due to the lack of alternative adequate accommodations; is living in emergency or transitional shelters; or is abandoned in hospitals; a child whose primary nighttime residence that is a public or private place not designed for or ordinarily used as a regular sleeping accommodation for human beings; a child who is living in cars, parks, public spaces, abandoned buildings, substandard housing, bus or train stations, or similar settings; an unaccompanied youth not in physical custody of a parent or guardian;

(C) A runaway, an unmarried child under 18 years of age who, without consent of the parent or other person having legal custody of that child, leaves and stays away from the home or other dwelling place provided for the child by that person;

(D) A child in a military family covered by the Interstate Compact on Educational Opportunity for Military Children;

(E) A child of a migrant worker, a worker that moved as an migratory agricultural worker or migratory fisher due to economic necessity from one residence to another residence, and from one school district to another; or

(F) Enrolled in the Youth Corrections Education Program or the Juvenile Detention Education Program.

(e) A school district or public charter school must accept any credits earned by students qualified for the additional district credit requirements waiver in another school district or public charter school and must apply them toward the 24 Units of Credit Requirements for the diploma.

(f) A school district or public charter school may grant high school credit for courses taken prior to grade 9 if students taking pre-grade 9 courses are required to meet performance criteria that are equivalent to the performance criteria for students taking the same high school courses;

(g) Course syllabi shall be written for courses in grades 9 through 12 and shall be available to students, staff, parents, the district school board and other interested individuals.

(7) Each student shall demonstrate proficiency in essential skills adopted by the State Board of Education as provided in OAR 581-022-2115;

(8) School districts shall develop a process that provides each student the opportunity to develop an education plan and build an education profile in grades 7 through 12 with adult guidance. The plan and profile shall be reviewed and updated periodically (at least annually) and be supported by a Comprehensive Guidance Program as defined in OAR 581-021-0435.

(9) Each student shall develop an education plan and build an education profile.

(a) Each student shall develop an education plan that:

(A) Identifies personal and career interests;

(B) Identifies tentative educational and career goals and post high school next steps (i.e. college, workforce, military, apprenticeship, other);

(C) Sets goals to prepare for transitions to next steps identified in section (7)(b);

(D) Designs, monitors and adjusts a course of study that meets the interest and goals of the student as described in subsection (a) (A), (B) and (C) of this rule that includes but is not limited to:

(i) Appropriate coursework and learning experiences;

(ii) Identified career-related learning experiences; and

(iii) Identified extended application opportunities.

(b) Through the education profile each student shall:

(A) Monitor progress and achievement toward standards including:

(i) Content standards;

(ii) Essential skills;

(iii) Extended application standard; and

(iv) Other standards where appropriate (e.g. industry standards).

- (B) Document other personal accomplishments determined by the student or school district.
- (C) Review progress and achievement in subsection (b)(A) and (B) of this subsection at least annually.
- (10) Each student shall build a collection of evidence, or include evidence in existing collections(s), to demonstrate extended application (as defined in OAR 581-022-0102);
- (11) Each student shall participate in career-related learning experiences outlined in the education plan (as defined in OAR 581-022-0102);
- (12) Notwithstanding sections (1) to (11) of this rule, each district school board or public charter school governing board with jurisdiction over high school programs shall award a modified diploma to those students who have demonstrated the inability to meet the full set of academic content standards even with reasonable modifications and accommodations and who fulfill all requirements as described in OAR 581-022-2010.
- (13) Notwithstanding sections (1) to (11) of this rule, each district school board or public charter school governing board with jurisdiction over high school programs shall award an extended diploma to those students who have demonstrated the inability to meet the full set of academic content standards even with reasonable modifications and accommodations and who fulfill all requirements as described in OAR 581-022-2015.
- (14) Notwithstanding sections (1) to (11) of this rule and as provided in OAR 581-022-2020, schools districts and public charter schools shall make an alternative certificate available to students as an alternative for students who do not obtain the regular diploma, modified diploma or extended diploma.
- (15) Attendance Requirements:
- (a) Twelve school years shall be required beginning with grade 1, except when the school district adopts policies providing for early or delayed completion of all state and school district credit and performance requirements;
- (b) Notwithstanding subsection (a) of this section, a student may satisfy the requirements of sections (2)(6) of this rule in less than four years. If the school district or public charter school has the consent of the student's parent or guardian, a school district or public charter school shall award a diploma to a student upon request from the student, if the student satisfies the requirements for the diploma that apply to the student based on the date of graduation of the student or the school year when the student first enrolled in grade 9, as applicable.
- (c) If a school district or public charter school has the consent of a student's parent or guardian, the school district or public charter school may advance the student to the next grade level if the student has satisfied the requirements for the student's current grade level.

(d) The requirement for obtaining the consent of a student's parent or guardian under subsections (b) and (c) of this section does not apply to a student who is:

(A) Emancipated pursuant to ORS 419B.550 to 419B.558; or

(B) 18 years of age or older.

(e) The district school board may adopt policies for alternative learning experiences, such as credit by examination and credit for off-campus experiences;

(f) With any modification of the attendance requirements for graduation, school district and public charter school staff shall consider age and maturity of students, access to alternative learning experiences, performance levels, school district or public charter school guidelines and the wishes of parents and guardians.

(16) A school district or public charter school shall ensure that students have access to the appropriate resources to achieve a diploma at each high school in the school district or at the public charter school.

Amended Text

581-022-2010

Modified Diploma

(1) Definitions. As used in this rule:

(a) “Documented history” means evidence in the cumulative record and education plans of a student that demonstrates the inability over time to maintain grade level achievement even with appropriate modifications and accommodations.

(b) “Instructional barrier” means a significant physical, cognitive or emotional barrier that impairs a student’s ability to maintain grade level achievement.

(c) “Modified course” means a course that has been systematically changed or altered for a student only after reasonable alternative instructional strategies (e.g. accommodations, remediation) are exhausted.

(d) “Other services” for the purposes of this rule means:

(A) Those services paid for or provided by another agency, such as Vocational Rehabilitation or Brokerages, which may be considered in the calculation of the total number of hours that equals at least the total number of instructional hours that is required to be provided to students who are attending public high school. These “other services” are not to be considered educational services and are not provided by or through the school district or public charter school.

(B) Those services identified in OAR 581-022-2320(4), such as school assemblies, student orientations, testing, etc, which may be considered in the calculation of the total number of hours that equals at least the total number of instructional hours that is required to be provided to students who are attending public high school. These services are provided by the school district or public charter school.

(2) On or after July 1, 2009, each district school board or public charter school governing board with jurisdiction over high school programs shall award a modified diploma only to students who have demonstrated the inability to meet the full set of academic content standards for a high school diploma even with reasonable modifications and accommodations but who fulfill all state requirements as described in this rule and all applicable local school district requirements as described in district school board policies or public charter school requirements as described in school policies. In addition, on or after July 1, 2009, a district school board or public charter school governing board may only award a modified diploma to a student who meets the eligibility criteria specified in section 3 of this rule.

(3)(a) Except as provided in paragraph (c) or (d) of this section, a school district or public charter school shall grant eligibility for a modified diploma to a student who has:

(A) A documented history of an inability to maintain grade level achievement due to significant learning and instructional barriers; or

- (B) A documented history of a medical condition that creates a barrier to achievement.
- (b) A student shall have the opportunity to meet the requirements of a modified diploma by the later of:
- (A) Four years after starting grade nine; or
- (B) The student reaching the age of 21 years, if the student is entitled to a public education until the age of 21 years under state or federal law.
- (c) A student may complete the requirements for a modified diploma in less than four years if the parent/guardian or adult student gives consent.
- (A) The consent must be written and must clearly state that the parent/guardian or adult student is waiving the 4 years to complete the requirements for a modified diploma.
- (B) A copy of all consents must be sent to the district superintendent.
- (C) Each school district must annually provide the number of consents obtained to the State Superintendent of Public Instruction.
- (D) The consent may not be used to allow a student to satisfy the requirements for a modified diploma in less than three years.
- (d) A school district or public charter school may not deny a student who has the documented history described in paragraph (a) of this subsection the opportunity to pursue a diploma with more stringent requirements than a modified diploma for the sole reason that the student has the documented history.
- (e) Students currently engaged in the use of illegal drugs are not eligible for a modified diploma if the significant learning and instructional barriers are due to the use of illegal drugs.
- (f) Students currently engaged in the illegal use of alcohol are not eligible for a modified diploma if the significant learning and instructional barriers are due to the alcohol abuse, regardless of whether that student is disabled under Section 504 on the basis of alcoholism.
- (g) Notwithstanding paragraph (c) and (d) of this section, a school district or public charter school may grant eligibility for a modified diploma to a student who is no longer engaging in illegal use of drugs or alcohol if the student:
- (A) Has successfully completed a supervised drug or alcohol rehabilitation program and are no longer engaged in the illegal use of drugs or alcohol; or
- (B) Has been rehabilitated successfully and is no longer engaged in the illegal use of drugs or alcohol; or
- (C) Is participating in a supervised rehabilitation program and is no longer engaging in the illegal use of drugs or alcohol.

(4)(a) A school district or public charter school shall determine which school teams shall decide if a student will work toward obtaining a modified diploma. A student's school team must include an adult student, parent/ guardian of the student.

(b) A school district or public charter school may award a modified diploma to a student only upon the consent of the parent or guardian of the student or upon the consent of the adult student or emancipated minor student. A district or school must receive the consent in writing and during the school year in which the modified diploma is awarded.

(A) If student is under 18, consent must be received from the parent or guardian.

(B) If the student is under age 18 and emancipated, consent must be received from the student.

(C) If the adult student is 18 or older, consent must be received from the student or guardian.

(D) If the student is under guardianship from the courts, consent must come from the court-appointed authority.

(c) Except as provided in subsection (e) of this section, a student's school team shall decide that a student should work toward a modified diploma no earlier than the end of the 6th grade and no later than 2 years before the student's anticipated exit from high school.

(d) Beginning in grade five, school district and public charter schools shall annually provide information to the parents or guardians of a student taking an alternate assessment of the availability of a modified diploma and the requirements for the modified diploma.

(e) A student's school team may formally decide to revise a modified diploma decision.

(f) A student's school team may decide that a student who was not previously working towards a modified diploma should work toward a modified diploma when a student is less than 2 years from anticipated exit from high school if the documented history of the student described in section (3) of this rule has changed.

(5) Unit of credit requirements for students graduating with a modified diploma:

(a) To receive a modified diploma a student must earn 24 units of credit, between grade 9 and the end of their high school career with at least 12 of those credits to include:

(A) ~~English~~-Language Arts — 3;

(B) Mathematics — 2;

(C) Science — 2;

(D) Social Sciences (which may include history, civics, geography and economics (including personal finance)) — 2;

(E) Health Education — 1;

(F) Physical Education — 1; and

(G) Career Technical Education, The Arts or World Languages (units may be earned in any one or a combination) — 1.

(b) School districts and public charter schools shall be flexible in awarding the remaining 12 units of credit. These credits must be awarded to meet the needs of the individual student as specified in the education plan of the student with the expectations and standards aligned to the appropriate grade level academic content standards. These credits may include:

(A) Additional core credits described in paragraph (a) of this section;

(B) Professional technical education;

(C) Electives; and

(D) Career development.

(c) Students may earn units of credit through regular education with or without accommodations or modifications and through modified courses.

(d) Students shall have the option to earn credit for demonstrating proficiency. A student may be given credit for successful demonstration of knowledge and skills that meets or exceeds defined levels of performance. Students may demonstrate proficiency through classroom work or documentation of learning experiences outside of school, or through a combination of these means.

(e) School districts and public charter schools shall ensure that students have access to needed courses, modifications and supports to pursue a modified diploma and to progress in the general education curriculum.

(f) A school district or public charter school may not require a student to earn more than 24 units of credit to receive a modified diploma.

(6) A school district or public charter school shall grant credit toward a modified diploma only for courses that contain substantial academic content. A school district or public charter school shall grant credit for a modified diploma through a continuum of instruction beginning at basic skills and progressing through high level skills.

(7) A school district or public charter school shall award a regular diploma under OAR 581-022-2000 if all requirements for a regular diploma are met. Completion of one or more modified courses shall not

prohibit a student from earning a regular diploma; however, required core courses taken under modified conditions must be retaken under standard conditions to be counted toward a regular diploma.

(8) A school district or public charter school shall grant credit toward a modified diploma according to individual student needs across academic content areas including applied, consumer, academic, or knowledge and skill development.

(9) Each student shall develop an education plan and build an education profile as provided under OAR 581-022-2000.

(10) A school district or public charter school shall inform the student and parent or guardian of the student if the courses in grades 9-12 have been modified for an individual student.

(11) A school district or public charter school shall provide transcripts which clearly identify modified courses that do not count toward the regular diploma but that do count toward a modified diploma.

(12) Each student shall build a collection of evidence, or include evidence in existing collections, to demonstrate extended application of the standards as defined in OAR 581-022-0102;

(13) Each student receiving a modified diploma shall have the option of participating in the high school graduation ceremony with the members of their class receiving a high school diploma.

(14)(a) A student who receives a modified diploma shall have access to instructional hours, hours of transition services and hours of other services that are designed to meet the unique needs of the student.

(b) When added together, the school district or public charter school will provide a total number of hours of instruction and services to the student that equals at least the total number of instructional hours that is required to be provided to students who are attending a public high school.

(c) The total number of hours that are appropriate for a student shall be determined by the individualized education program (IEP) team if the student is eligible for special education.

(d) Based on the student's needs and performance level, the student's IEP team may decide that the student will not access the total number of hours of instruction and services required to be provided to students who are attending a public high school.

(e) The school district or public charter school may not unilaterally decrease the total number of hours of instruction and services to which the student has access regardless of the age of the student.

(f) If a student's IEP team or school team, decides that the student will not access the total number of hours of instruction and services to which the student has access the school district or public charter school shall annually:

(A) Provide the following information in writing to the adult student, parent or guardian of the student:

(i) The school district's or public charter school's duty to comply with the requirements to provide the total number of hours of instruction and services to the student; and

(ii) The prohibition against a school district's or public charter school's unilaterally decreasing the total number of hours of instruction and services to which the student has access.

(B) Obtain a signed acknowledgment from the adult student, parent or guardian of the student that the adult student, parent or guardian received the information.

(C) Include in the IEP for the student a written statement that explains the reasons the student is not accessing the total number of hours of instruction and services to which the student has access.

(g) Transition services and other services designed to meet the unique needs of the student may be provided to the student through an interagency agreement entered into by the school district if the individualized education program developed for the student indicates that the services may be provided by another agency. The school district or public charter school retains the responsibility for ensuring that the student has access to the number of service hours required to be provided to the student.

(h) An agency is not required to change any eligibility criteria or enrollment standards prior to entering into an interagency agreement with the school district.

(i) School districts and public charter schools shall ensure that students have on-site access to the appropriate resources to achieve a modified diploma at each high school in the school district or at the public charter school.

(15)(a) The unit of credit requirements in section (5) of this rule for a modified diploma apply to all students who enter 9th grade on or after July 1, 2007.

(b) If a student entered 9th grade prior to July 1, 2007, the student's team shall decide whether the student must meet the unit of credit requirements in section (5) of this rule to receive a modified diploma or the unit of credit requirements specified by the school district or public charter school for a modified diploma when the student entered 9th grade. If a student's team decides that a student may receive a modified diploma by meeting the unit of credit requirements required by the district or school when the student entered 9th grade, a school district or public charter school may award a student who entered 9th grade prior to July 1, 2007 a modified diploma if the student meets the unit of credit requirements for a modified diploma specified by the district or school when the student entered 9th grade.

Amended Text

581-022-2015

Extended Diploma

(1) Definitions.

(a) "Other services" for the purposes of this rule means:

(A) Those services paid for or provided by another agency, such as Vocational Rehabilitation or Brokerages, which may be considered in the calculation of the total number of hours that equals at least the total number of instructional hours that is required to be provided to students who are attending public high school. These "other services" are not to be considered educational services and are not provided by or through the school district or public charter school.

(B) Those services identified in OAR 581-022-1620(4), such as school assemblies, student orientations, testing, etc, which may be considered in the calculation of the total number of hours that equals at least the total number of instructional hours that is required to be provided to students who are attending public high school. These services are provided by the school district or public charter school.

(2) A school district or public charter school shall award an extended diploma to a student who satisfies the requirements of this rule.

(3) A school district or public charter school shall award an extended diploma only to students who have demonstrated the inability to meet the full set of academic content standards for a high school diploma with reasonable modifications and accommodations.

(4) A school district or public charter school may award an extended diploma to a student only upon the consent of the parent or guardian of the student, or upon the consent of the adult student or emancipated minor student. A district or school must receive the consent in writing and during the school year in which the extended diploma is awarded.

(A) If student is under 18, consent must be received from the parent or guardian.

(B) If the student is under age 18 and emancipated, consent must be received from the student.

(C) If the adult student is 18 or older, consent must be received from the student.

(D) If the student is under guardianship from the courts, consent must come from the court-appointed authority.

(5) To be eligible for an extended diploma, a student must:

(a) While in grade nine through completion of high school, complete 12 credits, which may not include more than six credits earned in a self-contained special education classroom and shall include:

(A) Two credits of mathematics;

(B) Two credits of language arts;English;

(C) Two credits of Sscience;

(D) Three credits of history, geography, economics, or civics;

(E) One credit of health;

(F) One Ccredit of physical education; and

(G) One credit of arts or a second-world language; and;

(b) Have a documented history of:

(A) An inability to maintain grade level achievement due to significant learning and instructional barriers;

(B) A medical condition that creates a barrier to achievement; or

(C) A change in the student's ability to participate in grade level activities as a result of a serious illness or injury that occurred after grade eight.

(G) One credit of the arts or a second-world language;

(6)(a) A student shall have the opportunity to meet the requirements of an extended diploma by the later of:

(A) Four years after starting grade nine; or

(B) The student reaching the age of 21 years, if the student is entitled to a public education until the age of 21 years under state or federal law.

(b) A student may complete the requirements for an extended diploma in less than four years if the parent/guardian or adult student gives consent. The consent must be written and must clearly state that the parent/guardian or adult student is waiving the 4 years to complete the requirements for an extended diploma. A copy of all consents must be sent to the district superintendent. Each school

district must annually provide the number of consents obtained to the State Superintendent of Public Instruction. The consent may not be used to allow a student to satisfy the requirements for an extended diploma in less than three years.

(7) A school district or public charter school shall:

(a) Ensure that students have on-site access to the appropriate resources to achieve an extended diploma at each high school in the school district or at the public charter school or beginning after a documented history described in section (5)(b) above has been established, annually provide to the parents or guardians of a student who has the documented history, described above, information about the availability of an extended diploma and the requirements for the extended diploma.

(c) A school district or public charter school may not deny a student who has the documented history described in subsection (1)(a) of this section the opportunity to pursue a diploma with more stringent requirements than a modified diploma or an extended diploma for the sole reason that the student has the documented history.

(8)(a) A student who receives an extended diploma shall have access to instructional hours, hours of transition services and hours of other services that are designed to meet the unique needs of the student.

(b) When added together, the school district or public charter school will provide a total number of hours of instruction and services to the student that equals at least the total number of instructional hours that is required to be provided to students who are attending a public high school; or,

(c) The total number of hours that are appropriate for a student shall be determined by the individualized education program (IEP) team if the student is eligible for special education;

(d) Based on the student's needs and performance level, the student's IEP team may decide that the student will not access the total number of hours of instruction and services required to be provided to students who are attending a public high school.

(e) The school district or public charter school may not unilaterally decrease the total number of hours of instruction and services to which the student has access regardless of the age of the student.

(f) If a student's IEP team decides that the student will not access the total number of hours of instruction and services to which the student has access, the school district or public charter school shall annually:

(A) Provide the following information in writing to the adult student, parent, or guardian of the student:

(i) The school district's or public charter school's duty to comply with the requirements to provide the total number of hours of instruction and services to the student; and

(ii) The prohibition against a school district's or public charter school's unilaterally decreasing the total number of hours of instruction and services to which the student has access.

(B) Obtain a signed acknowledgement from the adult student, parent or guardian of the student that the adult student, parent or guardian received the information.

(C) Include in the IEP for the student a written statement that explains the reasons the student is not accessing the total number of hours of instruction and services to which the student has access.

(g) Transition services and other services designed to meet the unique needs of the student may be provided to the student through an interagency agreement entered into by the school district if the individualized education program developed for the student indicates that the services may be provided by another agency. The school district or public charter school retains the responsibility for ensuring that the student has access to the number of service hours required to be provided to the student.

(h) An agency is not required to change any eligibility criteria or enrollment standards prior to entering into an interagency agreement with the school district.

(9) School districts and public charter schools shall make extended diplomas as required by ORS 329.451 and this rule first available to students during the 2009-2010 school year.

Amended Text

581-022-~~0220~~30

District Curriculum

(1) Each school district shall provide a planned K–12 instructional program.

(2) The planned K–12 instructional program shall include the following:

(a) Common Curriculum Goals and academic content standards adopted by the State Board of Education to include:

(A) ~~Language Arts;English;~~

(B) Mathematics;

(C) Science;

(D) Social Science (including history, geography, economics and civics);

(E) The Arts;

(F) World Languages;

(G) Health Education; and

(H) Physical Education; and

(I) Comprehensive School Counseling.

(b) Additional Common Curriculum Goals for technology.

(c) Essential Learning Skills, as contained in the Common Curriculum Goals and academic content standards;

(d) Career-related learning standards, as contained in the Common Curriculum Goals and academic content standards; and

(e) Career education which may include career and technical education.

(3) The school district shall also provide instruction in other areas identified in chapter 581, division 22 of the Oregon Administrative Rules, including:

(a) Infectious diseases, including AIDS/HIV and Hepatitis B;

(b) Prevention education in drugs and alcohol; and

(c) Emergency plans and safety programs.

(4) The school district is also accountable to provide instruction in compliance with requirements set forth in ORS Chapter 336, Conduct of Schools Generally.

Amended Text

581-026-0300

Virtual Public Charter Schools

(1) All statutes and rules that apply to public charter schools also apply to virtual public charter schools. In addition, virtual public charter schools must also meet additional statutory requirements found in ORS Chapter 338.

(2) As used in ORS Chapter 338 and the rules of the State Board of Education, “virtual charter school” means a public charter school that provides online courses. An online course is a course in which:

(a) Instruction and content are delivered primarily on a computer using the internet other electronic network or other technology such as CDs or DVDs;

(b) The student and teacher are in different physical locations for a majority of the student’s instructional period while participating in the course;

(c) The online instructional activities are integral to the academic program of the school as described in its charter; and

(d) The student is not required to be located at the physical location of a school while participating in the course.

(3) Notwithstanding subsection (2) of this rule, “virtual public charter school” does not include a public charter school that primarily serves students in a physical location. A charter school is not a virtual public charter school if the schools meet all of the following requirements:

(a) More than 50 percent of the core courses offered by the school are offered at a physical location and are not online courses:

(b) More than 50 percent of the total number of students attending the school are receiving instructional services at a physical location and not in an online course; and

(c) More than 50 percent of the minimum number of instructional hours required to be provided to students by the school under OAR 581-022-0102 and OAR 581-022-2320 during a school year are provided at a physical location and not through an online course.

(4) As used in this rule:

(a) “Core course” means:

(A) ~~English language~~ Language arts including reading and writing;

(B) Mathematics;

(C) Science:

(D) Social sciences including history, civics, geography and economics

(E) Physical education;

(F) Health

(G) The arts;

(H) World languages and

(I) Career and technical education

(b) “Physical location” means a facility that is owned, leased or otherwise used by a school to deliver educational services. “Physical location” includes, but is not limited to, a school, library, public building or other physical space utilized by the school. “Physical location” does not include a student’s home.

(c) “Public charter school” has the meaning given that term in ORS 338.005.

(5) This rule does not apply to programs or courses offered by school districts, education service districts, alternative education programs or the Oregon Virtual School District.

581-017-0729 Intensive Program & Student Success Teams: Definitions

The following definitions apply to OAR 581-017-0729 to 581-017-0744:

(1) “Advisory Members” may include Education Service District staff, additional Department staff, district contracted personnel, additional district educators (principals, teachers and paraprofessionals), students and family and community members.

(2) “Community Steward” means the person designated by the Department who, among other things, brings expertise and experience in developing relational and operational community agreements aimed at fostering shared accountability for changing practice, policy and experiences.

(3) “Department” means the “Oregon Department of Education”.

(4) “Focal Student Group” means the specific groups of students outlined in ORS 327.180(2)(b).

(5) “Leadership Steward” means the person designated by the Department who, among other things, brings expertise and experience in transformational education leadership aimed at dismantling structures of systemic oppression.

(6) “ODE Point Person” means the designated, full-time Department employee who will serve on the Student Success Team.

(7) “Public Charter Schools” means an elementary or secondary school offering a comprehensive instructional program operating under a written agreement entered into between a sponsor and an applicant and operating pursuant to ORS 338.

(8) “School Districts” means an Oregon common school district, joint school district, or union high school district.

(9) “Sovereign Nation” means designated representation from one of Oregon’s nine Federally recognized Native American tribes.

(10) “Stewarding Members” are the ODE point person, the Leadership ~~Advisor~~Steward, the Teaching and Learning ~~Advisor~~Steward, the Community ~~Advisor~~Steward, the district superintendent, a school board member or community member, and a classroom teacher.

(11) “Student Success Team” means the group of Stewarding Members and the group of Advisory Members.

(12) “Teaching and Learning Steward” means the person designated by the Department who, among other things, brings deep knowledge and expertise in culturally responsive, sustaining and inclusive instructional practices.

Statutory/Other Authority: ORS 327.222

Statutes/Other Implemented: ORS 327.222

581-017-0738 Intensive Program & Student Success Teams: Criteria, Agreement and Establishing Improvement

(1) The department will prioritize districts with the greatest need as determined by a review of data. Districts with the highest need will receive priority. Given available resources, the department will determine the number of districts to include in the program.

(2) The Department will invite a minimum of three school districts and no more than 10 districts per biennium.

(3) Acceptance of the invitation requires:

(a) Four-year participation in the program that starts with the execution of grant agreements for additional funding; and

(b) Commitment to membership and representation on the Student Success Team:

(A) Whether by formal participation or through consultation, the experiences of the following perspectives, where applicable, must be included in decision-making considerations by the Stewardship Groupgroup of Stewarding Members:

(i) Focal student groups

(ii) General student body

(iii) Sovereign nation leadership

(c) Acceptance and implementation of the recommendations of the Student Success Team pursuant to terms outlined in ORS 327.222.

(4) At the end of the four years, participating school districts will have demonstrated improvement when:

(a) Student outcome data has improved to a point where the district would not be eligible for the program; and

(b) The Student Success Team determines the district has made progress in achieving the stated goals; and

(c) A community assessment indicates that sufficient progress has been made; and

(d) The school board and success teams have established a sustainability plan to preserve the progress and improvements made.

Statutory/Other Authority: ORS 327.222

Statutes/Other Implemented: ORS 327.222

581-017-0741 Intensive Program & Student Success Teams: Funding

(1) Available funds will be distributed based on ADMw.

(2) Maximum allocations will not exceed 50% of the total available funds per district.

(3) Minimum allocations will not fall below 5% of the total available funds per district.

(4) A portion of the allocation of at least \$50,000 but not to exceed 5% of the total allocation may be used to support coordination and collaboration between The Department and the district.

(5) All remaining Ffunds will be spent in accordance with recommendations from the Student Success Teams.

Statutory/Other Authority: ORS 327.222

Statutes/Other Implemented: ORS 327.222

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AGENDA ITEM: 3.E.

<p>SUBJECT: Intensive Coaching and Student Success Teams—Administrative Rules/ OAR 581-017-0729 to OAR 581-017-0744</p> <p>STAFF NAME & OFFICE: Tim Boyd, Sarah Rosenberg, and Chelsea Mabie (District and School Effectiveness)</p> <p>These rules pertain to the Intensive Coaching Program, a program “for school districts with the highest needs in the state” which was established as part of the Student Success Act. This program provides each participating district with additional support and funding through Student Success Teams. The proposed rule changes include: 1) making a temporary rule related to initial coordinating funds permanent; and 2) minor edits to improve the coherence of the rules.</p> <p><input type="checkbox"/> New Rule <input checked="" type="checkbox"/> Amend Existing Rule <input type="checkbox"/> Repeal Rule</p>	<p><input type="checkbox"/> First Reading <input type="checkbox"/> Presentation <input type="checkbox"/> No Presentation</p> <p><input checked="" type="checkbox"/> Action <input type="checkbox"/> Temp Rule <input type="checkbox"/> Presentation <input checked="" type="checkbox"/> No Presentation</p>
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BACKGROUND

Include the following points for new OARs, OAR updates or changes.

1. History

During the 2019 legislative session, Oregon’s leaders passed the Student Success Act, which established the Intensive Coaching Program (ICP) “for school districts with the highest needs in the state.” This program is by invitation, and only school districts are eligible. The program hinges on Student Success Teams, a joint effort between expert stewards, district leadership, and an ODE staff member who will propose recommendations to the district on effectively spending their state funding. The Oregon Department of Education is currently implementing the Intensive Coaching Program, and these amendments to rule will support clear and effective implementation.

2. Purpose

The purpose of the rule amendment is to support ODE in assisting participating school districts to access grant-in-aid funds to cover a limited amount of cost for skilled coordination and collaboration with the Department ahead of the Student Success Team making formal recommendations. In order for the Student Success Team to make informed recommendations, they need a period of time to learn about the district and its needs. This limited funding will support program implementation while the Student Success Team completes its initial onboarding.

There are also a few minor edits to improve coherence and clarity in the rules (i.e. shifting the term from “Advisor” to “Steward” to align with the rest of the rule.)

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3. Does the board have any areas of discretion or is this strictly mirroring statute?

The State Board of Education has discretion to develop rules that pertain to additional funding (grant-in-aid) for participating school districts.

4. Stakeholder voice/input (individual and collective i.e., groups)

The Oregon Department of Education’s District and School Effectiveness team, specifically Tim Boyd (Director of District and School Effectiveness), Sarah Rosenberg (Operations and Policy Analyst), and Chelsea Mabie (Education Specialist) were responsible for developing these rule changes and bringing them to the Board. Feedback from school districts as well as previous Rules Advisory Committee meetings were considered in developing the proposed change.

SUMMARY OF PREVIOUS BOARD ACTION

In December, 2021, the State Board approved these program rules, and, in September, 2021, the State Board approved the temporary rule related to coordination costs. The Board the first read these rules in January of 2022.

HAS THE RULE CHANGED SINCE LAST BOARD MEETING?

- N/A; first read—hasn’t been before board
 No; same as last month
 Yes – As follows:

POLICY ISSUE OR CONCERNS

These policy issues or concerns could be from the field, stakeholder groups, statements submitted during the comment period, or discussions among ODE staff. Consider the following questions:

1. Stakeholders

- a. *How have you intentionally involved stakeholders who are also members of communities affected by this rule?*

The initial rules developed for the program were informed by several rounds of engagement with the Rules Advisory Committee. The proposed changes were informed by additional input from school districts during the invitation process of the program.

- b. *Who are the historically underserved groups affected?*

The proposed changes will not have any immediate or direct impact on underserved groups. The changes offer a small adjustment to processes for accessing additional grant in aid intended to accelerate the implementation of the program as well as a process for school districts to appeal recommendations.

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- c. *If the rule change or policy decision has tribal implications and it has been deemed appropriate by the Department's Tribal Liaison, the Deputy Superintendent, or State Board, has there been engagement or collaboration with tribes in this rule change or policy decision?*

The rules for the Intensive Program and Student Success Team(s) are an extension of the Student Success Act and Student Investment Account initiatives and founded upon authentic and ongoing engagement of historically underserved communities, staff, and students.

Districts who accept participation in the program will be expected to formally consult with or include tribal leadership in the recommendation of the Student Success Teams where appropriate and applicable.

- d. *How has the Oregon Department of Education modified or enhanced the rule change or policy decision to address the needs of historically underserved communities?*

The rules for the Intensive Program and Student Success Team(s) are an extension of the Student Success Act and Student Investment Account initiatives and are founded upon authentic and on-going engagement of historically underserved communities, staff and students.

2. *Negative/Positive Effects*

- a. *What is the impact on the population most affected by this rule that the board should consider?*

Making this temporary rule permanent has the potential to add human capital and capacity to participating districts. Feedback from local advisory groups shared concern that without additional capacity, responsibilities for this program would fall on staff who already manage significant responsibilities. While small, this change aims to ensure the program receives proper focus.

- b. *What is the impact on eliminating the opportunity or achievement gap?*

Through this program, we aspire to close the opportunity and achievement gap in the state. By providing additional support, resources, and funding to the districts with the highest needs as well as deeply engaging with each district's community throughout the process, we hope to change the trajectory for these districts. Each of the participating districts have unrelenting and longstanding gaps, and we see this program as an opportunity to close them and, equally important, provide a playbook for other districts in the state to do similar work.

- c. *Have all the potential unintended consequences been considered?*

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To the best of our ability, we've explored and attempted to address unintended consequences of this program and proposed rules.

d. *Does this rule advance the 40/40/20 goals?*

Again, this program is an extension of the SSA / SIA and aims to close the opportunity and achievement gaps in the school districts with the highest needs, contributing directly to the 40/40/20 goals. By providing additional resources to districts who have consistently underperformed, we also see this program as elevating substantial and heretofore untapped potential for higher education in Oregon's students.

3. *What are the barriers to more equitable outcomes, either:*

The program is expressly aimed at addressing the barriers that will lead to more equitable outcomes. The success teams are designed to review progress, examine barriers preventing goals from being met, and strategize to alleviate those barriers.

INITIAL COORDINATING FUNDS: This is currently a temporary rule that the Department is recommending to be permanent. In 581-017-0741, the Department is proposing adding item #4 below and the clause "All remaining funds" has been added to item #5.

581-017-0741 Intensive Program & Student Success Teams: Funding

1. Available funds will be distributed based on ADMw
2. Maximum allocations will not exceed 50% of the total available funds per district
3. Minimum allocations will not fall below 5% of the total available funds per district
4. **A portion of the allocation of at least \$50,000 but not to exceed 5% of the total allocation may be used to support coordination and collaboration between The Department and the district.**
5. *All remaining funds* will be spent in accordance with recommendations from the Student Success Teams

MINOR EDITS

Under 581-017-0729, the Department proposes:

(10) "Stewarding Members" are the ODE point person, the Leadership **Steward Advisor**, the Teaching and Learning **Steward Advisor**, the Community **Steward Advisor**, the district superintendent, a school board member or community member, and a classroom teacher.

Under 581-017-0738 (b), the Department proposes:

b. Commitment to membership and representation on the Student Success Team; Whether by formal participation or through consultation, the experiences of the following perspectives, where applicable, must be included in decision-making considerations by **the group of Stewarding Members** ~~Stewardship Group~~:

EQUITY IMPACT ANALYSIS

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Oregon’s leaders placed equity at the heart of the Student Success Act. This program is purposefully focused on providing additional support and funding to districts who have failed their students, disproportionately those from historically underserved communities.

The proposed rule change helps further the Student Success Act’s commitment to equity by making resources available to participating districts, helping keep the focus and attention on the overall goals of the law. The additional resources will enhance coordination and collaboration between the participating district and The Department and will help accelerate the implementation of the program.

FISCAL ANALYSIS

ODE anticipates that these proposed rule changes will have a positive fiscal impact on participating school districts (and their schools) given the additional funding as part of the program. The rules provide more detail around the maximum and minimum amount of funding that each district can receive to ensure that funding is equitably distributed to participating districts (e.g. that funding does not go entirely to one large district and that small districts receive sufficient funding to have an impact on their operations.)

These rules have no significant fiscal impact on ODE and ESDs.

EFFECT OF A “YES” OR “NO” VOTE

Approving these rules allows participating school districts immediate access to portions of the additional grant in aid to support coordination of the program.

Not approving the amendment may impede participating district’s participation in the program until formal success teams have the opportunity to meet and pose recommendations pertaining to the coordination of the program.

STAFF RECOMMENDATION

Approve Approve next month No recommendation at this time
Prompted by: State law changes Federal law changes other

ATTACHMENTS

Attachment 1: Draft Rules

Assessment of Essential Skills

(1) Definitions. As used in this rule:

- (a) "Assessment option" means an assessment approved to assess proficiency in the Essential Skills for the purpose of earning a high school diploma or a modified diploma.
- (b) "Essential Skills" means process skills that cross academic disciplines and are embedded in the content standards. The skills are not content specific and can be applied in a variety of courses, subjects, and settings.
- (c) "Local performance assessment" means a standardized measure (e.g., activity, exercise, problem, or work sample scored using an official state scoring guide), embedded in the school districts' and public charter schools' curriculum that evaluates the application of students' knowledge and skills.
- (d) "Official state scoring guide" means an evaluation tool designed for scoring student work that includes specific, consistent assessment criteria for student performance and a 1-6 point scale to help rate student work. It is used by Oregon teachers to evaluate student work samples.
- (e) "Student-initiated test impropriety" means student conduct that:
 - (A) Is inconsistent with:
 - (i) The Test Administration Manual; or
 - (ii) Accompanying guidelines; or
 - (B) Results in a score that is invalid.
- (f) "Work sample" means a representative sample of individual student work (e.g., research papers, statistical experiments, speaking presentations, theatrical performances, work experience) that may cover one or more content areas and therefore may be scored using one or more official state scoring guide(s). At the high school level, a work sample can be used to fulfill both the local performance assessment requirement described in Section 2 of this rule and the Essential Skills requirement described in Section 3 of this rule.

(2) School districts and public charter schools that offer grades 3 through 8 or high school shall administer local performance assessments for students in grades 3 through 8 and at least once in high school. For each skill area listed in section (17) of this rule, the assessments shall consist of:

- (a) One work sample per grade scored using official state scoring guides; or
- (b) Comparable measures adopted by the district.

(3) School districts and public charter schools shall require high school students to demonstrate proficiency in the Essential Skills using assessment options that are approved by the State Board of Education for the purpose of student eligibility for:

- (a) The high school diploma as established in OAR 581-022-2000; or
- (b) The modified diploma as established in OAR 581-022-2010.

(4) Pursuant to ORS 339.115 and 339.505, school districts and public charter schools shall provide any eligible student with instruction in and multiple assessment opportunities to demonstrate proficiency in the Essential Skills for the purpose of achieving the high school diploma or the modified diploma.

(5) To be eligible to receive a high school diploma or a modified diploma:

- (a) For students first enrolled in grade 9 during the 2008-2009 school year, school districts and public charter schools shall require students to demonstrate proficiency in the Essential Skill listed in section (16)(a) of this rule: Read and comprehend a variety of text.
- (b) For students first enrolled in grade 9 during the 2009-2010 school year, school districts and public charter schools shall require students to demonstrate proficiency in the Essential Skills listed in sections (16)(a)-(b) of this rule:

(A) Read and comprehend a variety of text; and

- (B) Write clearly and accurately.
- (c) For students first enrolled in grade 9 during the 2010-2011 school year, school districts and public charter schools shall require students to demonstrate proficiency in the Essential Skills listed in section (16)(a)–(c) of this rule:
 - (A) Read and comprehend a variety of text;
 - (B) Write clearly and accurately; and
 - (C) Apply mathematics in a variety of settings.
- (d) For students first enrolled in grade 9 during the 2011-2012 school year or first enrolled in grade 9 in any subsequent school year, school districts and public charter schools shall require students to demonstrate proficiency in the Essential Skills listed in Section 16(a)–(c) of this rule and any additional Essential Skills for which:
 - (A) The State Board of Education has adopted the determination to phase in for inclusion in the high school diploma and modified diploma requirements; and
 - (B) The State Board of Education has adopted assessment options by March 1 of the student’s 8th grade year.
- (e) School districts and public charter schools may require students to demonstrate proficiency in additional Essential Skills beyond the minimum requirements described in section (5)(a)-(d) of this rule.
- (6) The Superintendent of Public Instruction shall establish an Assessment of Essential Skills Review Panel (AESRP) to make recommendations on:
 - (a) The phasing in of Essential Skills for inclusion in the high school diploma and the modified diploma requirements;
 - (b) The adoption of assessment options to measure students’ proficiency in the approved Essential Skills for the purpose of the high school diploma or the modified diploma; and
 - (c) The achievement standards used to determine student eligibility for the high school diploma or the modified diploma.
- (7) The AESRP shall work toward the goal of a system with a high degree of technical adequacy and equivalent rigor between assessment options as practicable.
- (8) The AESRP shall base its recommendations on evidence provided by:
 - (a) School districts;
 - (b) Research organizations; and
 - (c) Other experts.
- (9) The AESRP shall consist of assessment experts from:
 - (a) School districts, including but not limited to:
 - (A) Superintendents;
 - (B) Principals;
 - (C) Curriculum Directors;
 - (D) Educators;
 - (E) Special education educators; and
 - (F) English Language Learners (ELL) educators;
 - (b) Post-secondary education institutions; and
 - (c) Business partners who have expertise in:
 - (A) Assessment design;
 - (B) Assessment administration; or
 - (C) Use of assessments
- (10) The State Board of Education shall make the determination to adopt the AESRP’s recommended assessment options, and achievement standards for the purpose of conferring high school

diplomas and modified diplomas. The determination of the State Board of Education will be final and not subject to appeal.

- (11) The ODE shall issue the State Board of Education's intentions regarding the AESRP's recommendations by December 15 of each year and formal notice of the State Board of Education's final determination regarding the AESRP's recommendations by March 1 of each year as an addendum to the Test Administration Manual, which the ODE shall issue by August 1 of each year.
- (12) School districts and public charter schools shall adhere to the requirements set forth in the Test Administration Manual to:
 - (a) Administer;
 - (b) Score;
 - (c) Manage; and
 - (d) Document the district and school assessments of students' proficiency in the Essential Skills required to receive a high school diploma or a modified diploma.
- (13) School districts and public charter schools shall establish conduct and discipline policies addressing student-initiated test impropriety.
- (14) School districts and public charter schools shall allow students to use assessment options and achievement standards adopted by the State Board of Education in a student's ninth through twelfth grade years as follows:
 - (a) Students may demonstrate proficiency in the Essential Skills using assessment options adopted in their ninth through twelfth grade years.
 - (b) Students may use achievement standards adopted in their 9th through 12th grade years that are equal to or lower than the achievement standards approved as of March 1 of the students' 8th grade year.
- (15) Districts may develop and administer a local assessment option for students to demonstrate proficiency in the Essential Skills, using established professional and technical standards in place of the assessment options adopted by the State Board of Education as described in section 14 of this rule. Districts that choose this option are required to publish:
 - (a) A communication strategy to ensure stakeholders are notified of the district's approach to the local assessment option; and
 - (b) Materials written in plain language that contain descriptions of the
 - (A) Purpose of the assessment;
 - (B) Scoring methodology;
 - (C) Method by which students and parents will receive results from the assessment;
 - (D) Criteria for determining student proficiency using the assessment; and
 - (E) Criteria for determining which students will have access to the assessment
- (16) The ODE shall publish the subset of Essential Skills assessment options and the associated performance levels which may be used by each of Oregon's post-secondary institutions as defined by those institutions' policies provided to the ODE by October 15 of each year.
- (17) The Essential Skills identified by the State Board of Education as of July 1, 2008 are as follows:
 - (a) Read and comprehend a variety of text;
 - (b) Write clearly and accurately;
 - (c) Apply mathematics in a variety of settings;
 - (d) Listen actively and speak clearly and coherently;
 - (e) Think critically and analytically;
 - (f) Use technology to learn, live, and work;
 - (g) Demonstrate civic and community engagement;
 - (h) Demonstrate global literacy; and

- (i) Demonstrate personal management and teamwork skills.
- (18) School districts and public charter schools shall include one or more local performance assessments for grades 3 through 8 and for high school for each of the following skill areas:
 - (a) Writing;
 - (b) Speaking;
 - (c) Mathematical problem-solving; and
 - (d) Scientific inquiry.
- (19) School districts and public charter schools may include one social science analysis work sample that is administered in accordance with school district or public charter school policies as a local performance assessment for grades 3 through 8 and for high school.
- (20) For students on an Individualized Education Plan (IEP) or 504 Plan, if a student's IEP or 504 Team determines that the nature of a student's disability prevents the student from demonstrating proficiency in an Essential Skill using any of the approved assessment options listed in the Test Administration Manual, the student's IEP Team may exempt the student from the requirement as listed in the Test Administration Manual and determine an appropriate replacement assessment option for the student to use that addresses the Essential Skill in a manner that is consistent with:
 - (a) The student's instructional plan; and
 - (b) The state assessment criteria adopted by the State Board of Education.
- (21) For students seeking a modified diploma, school districts and public charter schools may modify the assessment options adopted by the State Board of Education when the following conditions are met:
 - (a) For students on IEP or 504 Plans:
 - (A) School districts and public charter schools must comply with all requirements established by the student's IEP or 504 Plan when implementing modifications for work samples;
 - (B) School districts and public charter schools must comply with OAR 581-022-2100 section (4)(d) when implementing modifications for a statewide assessment.
 - (b) For students not on IEP or 504 Plans:
 - (A) School districts and public charter schools may only implement modifications for work samples that are consistent with the modifications the student has received during instruction in the content area to be assessed in the year in which the work sample is administered.
 - (B) School districts and public charter schools must obtain approval from the school team responsible for monitoring the student's progress toward the modified diploma before implementing modifications for work samples.
 - (C) Consistent with OAR 581-022-2100, school districts and public charter schools may not implement modifications for statewide assessments for students who are not on an IEP or 504 Plan.
- (22) The Essential Skills graduation requirements established by Sections 3, 4, and 5 of this rule are waived for students graduating in the 2021-2022, 2022-23, & 2023-24 school years.

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<p>SUBJECT: SB 744 Implementation STAFF NAME & OFFICE: Dan Farley, Office of Teaching, Learning, and Assessment</p> <p>The Oregon Legislature passed Senate Bill 744 in the 2021 long session, which requires ODE to research Oregon’s graduation policies, as well as graduation policies from other states, engage with education and community partners, and define the disparities and causes therein for Oregon’s historical graduation outcomes. Pursuant to Senate Bill 744 implementation, the State Board is asked to extend the suspension of the Assessment of Essential Skills at (OAR) 581-022-2115:</p> <p>“(22) The Essential Skills graduation requirements established by Sections 3, 4, and 5 of this rule are waived for students graduating in the 2021-2022, 2022-23, & 2023-24 school years.”</p> <p><input type="checkbox"/> New Rule <input checked="" type="checkbox"/> Amend Existing Rule <input type="checkbox"/> Repeal Rule</p>	<p><input type="checkbox"/> First Reading <input type="checkbox"/> Presentation <input type="checkbox"/> No Presentation</p> <p><input checked="" type="checkbox"/> Action <input type="checkbox"/> Temp Rule <input type="checkbox"/> Presentation <input checked="" type="checkbox"/> No Presentation</p>
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BACKGROUND

Include the following points for new OARs, OAR updates or changes.

1. History:

October 2008: Oregon Administrative Rule ([\(OAR\) 581-022-2115](#): *Assessment of Essential Skills*) states that, “school districts and public charter schools shall require students to demonstrate proficiency in the Essential Skills listed in Section 16(a)–(c)”. There are nine Essential Skills:

1) Read and comprehend a variety of test;

2) Write clearly and accurately;

3) Apply mathematics in a variety of settings;

4) Listen actively and speak clearly and coherently;

5) Think critically and analytically;

6) Use technology to live, learn, and work;

7) Demonstrate civic and community engagement;

8) Demonstrate global literacy; and,

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9) Demonstrate personal management and teamwork skills.

The initial design and intention of the nine Essential Skills was to require demonstrated proficiency in all areas. Since their implementation, however, the primary statewide focus has been around the first three Essential Skills. The remaining six have been evaluated locally; without statewide data there is little known or understood about student performance in these six domains at a systems level. The complete nine essential skills are rarely emphasized holistically, despite their importance of developing the whole child and ensuring that all Oregon students receive a well-rounded education.

OAR 581-022-2115 regulation states that students are required to demonstrate proficiency in the Essential Skills to receive a Regular or Modified Diploma. The State Board of Education has approved four categories of assessments by which students may demonstrate proficiency in the required Essential Skills:

1. Oregon Statewide Summative Assessment
2. Other Standardized Assessment*
3. Work Samples (six required; two for writing, two for reading and two for mathematics)
4. Local Assessment Option (rarely, if ever, used)

**Other Standardized Assessment Option recommendations are made through ODE and presented to the Assessment of Essential Skills Review Panel (AESRP). AESRP reviews and recommends additions or changes to the list of approved assessment options based, in part, on technical documentation for the assessment and on evaluating student score data. AESRP's recommendations are provided to the State Board of Education and must be adopted by the State Board of Education before they can be included as an approved assessment for the Essential Skills.*

Due to the COVID-19 pandemic, the U.S. Department of Education suspended all summative assessments for schools in spring of 2020. In spring of 2021, Oregon requested a waiver from the federal government to substantially reduce the number of assessments students were required to take due again to the impact of the COVID-19 pandemic. Collectively, this meant that student's primary means of demonstrating proficiency in reading, writing, and mathematics were not consistently available to them and therefore the State Board of Education suspended the Assessment of Essential Skills for the 2019-2020 and 2020-2021 school years.

a. What prompted this update to the board?

During the 2021 Oregon Legislative Session the Oregon Legislative Assembly passed [SB 744](#) which directs the Oregon Department of Education to review state requirements for high school diploma options, as well as to review state requirements related to demonstrations of proficiency by means of the assessment of Essential Skills. SB 744 does not change graduation

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requirements to courses nor to credits, nor does it change any other requirements, including the local performance assessment, education plan, education profile, and extended application.

SB 744 requires that a final report be submitted to the State Board and to the interim committees of the Legislative Assembly, with recommendations, **by September 1, 2022**. The report must include:

“... an analysis of the effectiveness of requiring students to demonstrate proficiency in Essential Learning Skills and an explanation of the reasons the department concludes that requirements related to demonstrations of proficiency in Essential Learning Skills should be retained, modified or eliminated. If the department concludes that demonstrations of proficiency of Essential Learning Skills should be retained, the department shall provide recommendations for alternative methods for students to demonstrate proficiency in skills or academic content areas that are not related to career and technical education.”

2. Purpose

The purpose of this presentation is to provide information regarding SB 744, outline the work plan that ODE is implementing in order to meet the deliverables and timeline present in the bill, and solicit questions, concerns, and recommendations from State Board members. The bill also requires that the State Board extend the suspension of the demonstration of proficiency in the Essential Skills as a student graduation requirement at OAR 581-022-2115 through the 2023-24 school year.

a. What function does this policy or update hold?

The written report will update the board on the language included in SB 744 and the required actions that the *Senate Bill 744 Implementation Team* is taking to meet the requirements of the bill, as well as to inform the State Board regarding state regulation at OAR 581-022-2115 that will need to be modified as a result of the bill through the 2023-24 academic year.

i. How long has this policy in place?

The Oregon State Board of Education identified the Essential Skills requirements on July 1, 2008.

3. Does the board have any areas of discretion on this policy and/or update?

The State Board established the historical rule that set graduation requirements at OAR 581-022-2115. The Senate Bill 744 Implementation Team will provide updates on implementation progress to the State Board throughout the 2021-22 school year, culminating in the provision of the final report due by September 1, 2022.

4. Education and Community Partner voice/input (individual and collective i.e., groups)

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1. Who was involved in bringing this to the Board? The Oregon Department of Education brought this information to the Oregon State Board of Education to inform the board of legislative actions included in SB 744 and to call attention to the direct and potential impacts on board decision making.
2. What did engagement in this process entail? The Oregon Legislature held public comment during the 2021 legislative session. Additional education and community partner engagement will be conducted, as directed in the bill, over the course of 2021-22.
3. Who may be affected by this? As described in SB 744, Oregon students will not be required to show proficiency in Essential Skills as a condition of receiving a high school diploma during the 2021-2022, 2022-2023, and 2023-2024 school years. Student knowledge and skill in reading, writing, and mathematics will remain a requirement, pursuant to coursework and credit requirements. Students will still be required to obtain 24 credits to graduate, which remains a high bar when compared to other state graduation requirements. The desired outcome of Senate Bill 744 is for ODE to make recommendations to the Legislature and State Board, outlining options for a graduation process that is equitable, accessible, and inclusive.
4. Whose voice is missing? It is unknown which historically marginalized groups were included in the public comment testimony or the engagement process legislation conducted outside of the public comment legislative process. The Senate Bill 744 Implementation Team will intentionally engage education and community partners who have historically been and continue to be underserved by our education systems as evidenced by graduation rates, including: Oregon's Nine Tribes, Indigenous and Native students, students experiencing disabilities, students who are emerging bilinguals, African American/Black students, Latino/a/x students, and students of color.
5. What more information does the Board need prior to moving forward? This presentation is a first read of a needed change current a current rule in order to move into compliance with statute.

SUMMARY OF PREVIOUS BOARD ACTION

1. Has this been before the board before? If so, what action did the board take?

Yes, The Oregon State Board of Education has previously suspended the assessment of Essential Skills during the 2019 - 20 and 2020 - 21 academic calendars.

- On June 11, 2020 at 11:30 AM the Oregon State Board of Education adopted 3.D. Administrative rules to implement guidance issued pursuant to Executive Order 20-20. ([Docket - temporary rules to implement EO 20-20 and the Department's guidance](#))

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- Graduation Pathways 2020 - Suspend all Essential Skills and Personalized Learning requirements for seniors (Career Related Learning Experiences, Extended Application, and Education Plan and Profile).
- On January 13, 2021 at 3:55 PM the Oregon State Board of Education adopted 3.A. Administrative rules to implement Ready Schools Safe Learners and Executive Order 20-29. ([January 2021 Docket - Administrative rules to implement RSSL and EO 20-29](#))
 - 581-022-0104 State Standards for the 2020-21 School Year - The rule specifies that for the 2020-21 school year, all division 22 standards are in effect unless waived by this rule. The following standards are waived for 2020-21: Essential Skills graduation requirements and local performance assessment requirements for grades 3 – 8 and high school.
- Informational updates regarding Senate Bill 744 implementation were presented to the State Board on September 16, 2021 and December 9, 2021.
- A First Read for these rules was heard at the January 2022 State Board meeting.

HAS THE RULE CHANGED SINCE LAST BOARD MEETING?

- N/A; first read—hasn't been before board
- No; same as last month
- Yes – As follows:

POLICY ISSUE OR CONCERNS

These policy issues or concerns could be from the field, stakeholder groups, statements submitted during the comment period, or discussions among ODE staff. Consider the following questions:

1. Stakeholders

- a. How have you intentionally involved stakeholders who are also members of communities affected by this rule?

As mentioned above, the Senate Bill 744 Implementation Team will intentionally engage education and community partners who have historically been and continue to be underserved by our education systems. ODE has planned for educator and community engagement process, some of which is directly facilitated by ODE and some which we have partnered with Oregon's Kitchen Table to assist with design and facilitation.

- b. Who are the historically underserved groups affected?

The groups outlined in the bill include the following: students experiencing disabilities, students who are emerging bilinguals, students who are immigrants or refugees, youth-led organizations, communities of color, and federally-recognized Tribes in Oregon.

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- c. Has there been consultation or collaboration with Tribes in this rule change or policy decision?

Consultation and collaboration with Tribes is part of the engagement plan.

- d. How has the Oregon Department of Education modified or enhanced the rule change or policy decision to address the needs of historically underserved communities?

The terms of the bill are established by statute; the expected outcome of making recommendations about graduation policies that are equitable, accessible, and inclusive, as well as the required engagement, should enhance the information available to the State Board in making policy decisions to address the needs of students historically underserved by the system.

2. Negative/Positive Effects

- a. What is the impact on the population most affected by this rule that the board should consider?

Summative assessment results in Oregon have been a tool for system accountability, bringing important focus in policy and resource distribution to students whom our education system is not yet designed to serve. It is critical to evaluate the ways in which students demonstrate proficiency in core content in Oregon, as there are concerning disparities in the percentages of students of color, students who are emerging bilinguals, and students who experience disability who graduate by demonstrating proficiency via work samples or with modified diplomas.

Students will no longer be required to participate in an additional graduation validation process defined by state-approved assessment options, which removes this shared point of reference and high-level system accountability. While course requirements, credit requirements, and skill and knowledge in reading, writing, and mathematics all remain requirements, the standards by which proficiency will be determined will live at the local level and will not be standardized or validated.

- b. What possible opportunities, assets or access could this rule provide?

The bill presents an opportunity to reconsider and possibly redesign the Oregon Diploma to ensure innovation, visionary commitment to learning, equity, access and inclusive values. It has been thirteen years since Oregon has revisited graduation requirements, and we are at an inflexion point as we continue to evolve how we approach teaching and learning and assessment during a prolonged pandemic. Graduating from high school represents a significant achievement for every student and should also serve as the fulfillment of our promise to students related to the opportunity they have had over thirteen years to develop, deepen, and extend their learning, knowledge base, and critical thinking skills across multiple content areas.

- c. What is the impact on eliminating the opportunity or achievement gap?

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The opportunity to graduate is one that has not been equitably experienced by Oregon’s students whom our education systems were not designed to serve. Identifying and recommending practices that are more equitable, accessible, and inclusive can help to reduce this opportunity gap. The social and educational systems in which these opportunity gaps are sourced remain, however, and will continue to influence what is feasible.

d. Have all the potential unintended consequences been considered?

The bill requires an ODE response. Suspending the demonstration of proficiency in Essential Skills requirement will result in more local control of graduation decisions. Districts are not required to make the results of their assessments or graduation decision-making publicly available, which ODE is required to do at the state level. Public reporting of data is a critical component of transparency, including 4- and 5-year cohort graduation rates and percentages of students with standard or modified diplomas.

e. Does this rule advance the ESSA goals?

The bill requires an ODE response. The requirement of demonstrations of proficiency in Essential Skills is a state graduation requirement that is beyond the scope of ESSA.

3. What are the barriers to more equitable outcomes:

There are many socio-economic and education-related barriers regarding student graduation rates in Oregon, which have been trending upward since 2013-14 (the year beyond which longitudinal calculations are comparable). While graduation rates in Oregon have been increasing overall and the opportunity gaps between students of color and Oregon state averages have been decreasing, graduation disparities remain:

- State Four-Year Cohort Graduation Rate in 2018-19: 80%
- American Indian/Alaska Native: 67%
- Black/African-American: 76%
- Hispanic/Latino: 80%

Students experiencing disabilities had the opportunity to graduate at a rate of 68% (45% of students experiencing disabilities have the opportunity to earn a regular diploma) and students who were emerging bilinguals (English Learners/ELs) in high school had a graduation rate of 65% (students who were former ELs graduated at 86%).

EQUITY IMPACT ANALYSIS

The following questions are designed to examine how the proposed rule, policy or action systematically affect historically underserved students and/or communities.

Impact of the Assessment of Essential Skills

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The majority of students meet their assessment of Essential Skills proficiency requirements in reading, writing, and mathematics using the statewide summative assessments. The table below illustrates the percentage of students using each assessment option (statewide summative assessments, other standardized assessments approved by the State Board, and work samples) to earn a Regular Diploma in 2019 (the most recent available data).

Essential Skill	State Summative	Other Standardized Assessment	Work Sample
Reading	72%	16%	12%
Writing	68%	9%	23%
Mathematics	54%	19%	26%

There are significant equity impacts for students who use work samples to meet the Assessment of Essential Skills graduation requirements, outlined below.

Impact of Work Samples

Though work samples are intended to be incorporated into student’s existing courses and may reflect appropriate incorporation of student identity and agency into the assessment process, anecdotal evidence collected from school districts and families demonstrates that many high schools instead enroll students who have not met the Assessment of Essential Skills graduation requirement in “Work Samples” elective courses in their senior year. As a result, these students may not have the opportunity to participate in other elective courses that contribute to both student engagement and well-rounded educational opportunities. Assessment of Essential Skills data reveal that this dynamic is disproportionately impacting Oregon’s students of color, particularly for students who are Black/African-American, and emerging bilinguals, as a substantial percentage of Oregon’s students of color meet the Assessment of Essential Skills graduation requirement using Work Samples.

The disproportionate use of work samples by Oregon’s students of color and emerging bilinguals and the resulting course option inequities for these students indicates the need for Oregon to more closely examine the impact of the proficiency in Essential Skills graduation requirement as it currently exists on those student groups that have been and continue to be underserved by Oregon’s social and education systems. The opportunity to engage with Oregon educators (e.g., high school counselors, high school teachers, related service providers, and educational assistants) and administrators (e.g., migrant education coordinators, special education directors, English language coordinators, and principals) should allow for ODE to develop a better understanding of how graduation policies are implemented at the local level and determine whether there are concerning equity impacts.

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FISCAL ANALYSIS

What is the fiscal impact of the proposed rule changes to the Department of Education, school districts, education service districts or schools? Use the following suggestions as a guide:

1. How does the proposed rule fit within the budget of the agency?
There are no fiscal impacts that the Board should consider at this time.
 - a. Which units/divisions/offices will be impacted and how?
Implementation of SB 744 primarily impacts the Office of Teaching, Learning, and Assessment, which is charged with effecting the bill's requirements.
2. How does the proposed rule change impact school districts and ESDs?
The rule change extends the suspension of the assessment of Essential Skills through the 2023-24 school year, pending recommendations that will result from the report that the Senate Bill 744 Implementation Team will present to the legislature and State Board by September 1, 2022.
3. How does the proposed rule change impact schools and other educational institutions?
Schools and other educational institutions do not have to track student proficiency in relation to the assessment of Essential Skills requirements. Some districts may also change course structures to eliminate the work samples courses that are not currently necessary, which may allow more students to avail themselves of other elective credit opportunities.
4. Does the proposed rule change impact other stakeholders?
Graduation is the summative achievement in Oregon's public school system and denotes a transition as an adult into our communities. Graduation policy affects all Oregonians. Oregon's stringent graduation credit requirements remain in place; students must demonstrate grade level knowledge and skill in reading, writing, and mathematics in order to graduate, as well as completing all personalized learning requirements.

EFFECT OF A "YES" OR "NO" VOTE

Explain the consequences of a Board approving or not approving the staff recommendation.

Approving the staff recommendation would result in alignment with current Oregon statute. Not approving the staff recommendation would result in misalignment.

STAFF RECOMMENDATION

Approve Approve next month No recommendation at this time
Prompted by: State law changes Federal law changes other

ATTACHMENTS

Draft Rules

DRAFT CREATED BY BD

581-021-0511 Fingerprinting of Subject Individuals in Positions Not Requiring Licensure as Teachers, Administrators, Personnel Specialists, School Nurses

(1) School districts shall adopt and implement local board policy related to fingerprint collection and processing which shall:

- (a) Specify that subject individuals as defined by this rule are subject to fingerprinting and criminal records checks required by law;
- (b) Specify which contractors will be considered to have unsupervised access to children and are subject to fingerprinting and criminal records checks required by law;
- (c) Specify the format used to notify subject individuals that fingerprinting and criminal record checks are required by law and that any action resulting from those checks may be appealed as a contested case;
- (d) Provide a clear statement that the district will terminate the employee, if it receives notification by the Superintendent of Public Instruction that the person has a conviction for any of the crimes prohibiting employment that are identified under section (8) of this rule;
- (e) Provide a clear statement that the district may terminate the employee, if it receives notification by the Superintendent of Public Instruction that the person has knowingly made a false statement as to the conviction of any crime;
- (f) Specify that subject individuals may begin to carry out terms of a contract or employment on a probationary basis pending the return of state and national criminal records checks;
- (g) Identify that employment shall be offered prior to collecting fingerprint information and that fees may be collected from the subject individual. The subject individual may request that the amount of the fee be withheld from the amount otherwise due the individual, and the school district shall withhold the amount only upon the request of the subject individual; and
- (h) Identify a procedure that ensures the integrity of fingerprint collection and will prevent any possible compromise of the process.

(2) Fingerprints may be collected by one of the following:

- (a) Employing school district staff;
- (b) Contracted agent of employing school district;
- (c) Local or state law enforcement agency.

(3) Immediately following offer and acceptance of employment or contract, school districts shall send fingerprint information for each subject individual to the Oregon Department of Education for purposes of a criminal records check.

(4) Criminal records check requests shall be submitted electronically through the statewide vendor identified by DAS. Exemptions from this requirement may be granted by the Oregon Department of Education on an individual basis. Reasons for exemption include, but are not limited to, geographic location and ability of vendor to meet needs. School districts exempted from the electronic process shall submit fingerprint information on forms provided by the Oregon Department of Education.

(5) The Oregon Department of Education shall request criminal records information from the Oregon State Police in the manner prescribed by law. A fee ~~of \$59~~ per criminal records check request shall be established by the department, reviewed annually, and commensurate to cost changes to Oregon State Police or Federal Bureau of Investigation fee schedules and other costs associated with acquiring and furnishing criminal offender information. ~~will~~The fee shall be:

(a) Deducted from the SSF payment for school districts that receive SSF payments; or

(b) Invoiced to school districts that do not receive SSF payments.

(6) Upon receipt of criminal records information, the Oregon Department of Education shall review the criminal records of a subject individual. The State Superintendent of Public Instruction shall:

(a) Issue a statement of criminal history status and related impact on employment or contract qualification; and

(b) Notify the school district if the subject individual has knowingly made a false statement as to conviction of a crime.

(7) Subject individuals who refuse to consent to the criminal records check or refuse to be fingerprinted shall be terminated from employment or contract status by the district.

(8) Subject individuals who have a conviction for any of the crimes listed in ORS 342.143, or the substantial equivalent of any of those crimes if the conviction occurred in another jurisdiction or in Oregon under a different statutory name or number, shall be refused continued employment or have employment terminated upon notification from the Superintendent of Public Instruction.

(9) A school district may terminate the employment of any subject individual who knowingly makes a false statement as to the conviction of a crime upon notification of the false statement by the Superintendent of Public Instruction.

(10) Evaluations of crimes shall be based on Oregon laws in effect at the time of conviction, regardless of the jurisdiction in which the conviction occurred.

(11) Prior to making a determination that results in a notice and opportunity for hearing, the Superintendent of Public Instruction may cause an investigation to be undertaken. Subject individuals

and districts shall cooperate with the investigation and may be required to furnish oral or written statements by affidavit or under oath. If the Superintendent of Public Instruction determines through investigation that a violation of this rule has not occurred, a written decision explaining the basis for the decision will be provided to the subject individual.

(12) Subject individuals may appeal a determination that prevents their employment or eligibility to contract with a school district as a contested case under ORS 183.413 to 183.470 to the Superintendent of Public Instruction.

(13) The Oregon Department of Education shall not provide copies of criminal records to anyone except as provided by law. The subject individual may inspect his or her personal criminal records under the supervision of properly certified LEADS personnel at the Oregon Department of Education.

(14) The Oregon Department of Education shall maintain a record of all properly submitted fingerprint information. The record shall include at least the following:

- (a) Fingerprint sequence number;
- (b) District submitting the fingerprints;
- (c) Date the Department form is received;
- (d) Date fingerprint information is sent to Oregon State Police; and
- (e) Date denial or final approval sent to district.

Statutory/Other Authority: ORS 326.051

Statutes/Other Implemented: ORS 326.603

581-021-0512 Non-employment criminal background checks for school districts

(1) School districts that have volunteers that have direct unsupervised contact with students shall have a policy requiring those volunteers to undergo a criminal records check.

(2) State criminal records check based on name and DOB:

(a) A school district may submit a request to the Oregon Department of Education for an in-state criminal records check in LEADS based on name and DOB on any volunteer.

(b) State criminal records check requests made under this section shall:

(A) Use forms provided by the Oregon Department of Education;

(B) Include an authorization from the volunteer for the Oregon Department of Education to perform a criminal records check; and

(C) Include payment of the processing fee of \$5 per person to be checked.

(3) State and national criminal records check based on fingerprints:

(a) A school district may submit a request to the Oregon Department of Education for a fingerprint-based criminal records check for volunteers identified in local board policy as requiring a fingerprint-based criminal records check.

(b) Requests for fingerprint-based criminal records checks shall be submitted electronically through the statewide vendor identified by DAS. Exemptions from this requirement may be granted by the Oregon Department of Education on an individual basis. Reasons for exemption include, but are not limited to, geographic location and ability of vendor to meet needs. School districts exempted from the electronic process shall submit fingerprint information on forms provided by the Oregon Department of Education;

(c) A fee shall be established by the department, reviewed annually, and commensurate to cost changes to Oregon State Police or Federal Bureau of Investigation fee schedules and other costs associated with acquiring and furnishing criminal offender information. The fee shall be:

(A) Deducted from the SSF payment for school districts that receive SSF payments; or

(B) Invoiced to school districts that do not receive SSF payments.

(d) A fingerprint-based criminal records check conducted in accordance with this section will be a state and national check through the Oregon State Police and the FBI.

(4) The Oregon Department of Education shall review the criminal records when a request is made under section (2) or (3) of this rule, make a fitness determination, and notify the school district of that determination.

(a) A volunteer does not meet the fitness standards of this rule if the individual has:

(A) A conviction for any of the crimes listed in ORS 342.143, or the substantial equivalent of any of those crimes if the conviction occurred in another jurisdiction or in Oregon under a different statutory name or number; or

(B) Knowingly made a false statement.

(b) The Oregon Department of Education shall not provide copies of criminal records to anyone except as provided by law.

(5) Volunteers may appeal a fitness determination resulting from a fingerprint-based criminal records check under section (3) of this rule as a contested case under ORS 183.413 to 183.470 to the Superintendent of Public Instruction.

(6) Notwithstanding the fitness determination made by the Oregon Department of Education pursuant to this rule, a school district may allow a volunteer that has undergone a criminal records check to have direct, unsupervised contact with school children.

Statutory/Other Authority: ORS 326.051

Statutes/Other Implemented: ORS 326.607

581-045-0586 Fingerprinting of Subject Individuals Employed by Private Schools in Positions Not Requiring Licensure as Teachers, Administrators, Personnel Specialists, School Nurses

(1) A private school may request that the Oregon Department of Education conduct a criminal records check of a subject individual by submitting fingerprint information for that individual to the Department.

(2) Criminal records check requests shall be submitted electronically through the statewide vendor identified by DAS. Exemptions from this requirement may be granted by the Oregon Department of Education on an individual basis. Reasons for exemption include, but are not limited to, geographic location and ability of vendor to meet needs. Private schools exempted from the electronic process shall submit fingerprints on forms provided by the Oregon Department of Education.

(3) The Department shall request criminal records information from the Oregon State Police in the manner prescribed by law. A fee ~~of \$59~~ per criminal records check request shall be established by the department, reviewed annually, and commensurate to cost changes to Oregon State Police or Federal Bureau of Investigation fee schedules and other costs associated with acquiring and furnishing criminal offender information. The fee shall ~~will~~ be invoiced to the private school.

(4)(a) Upon receipt of criminal records information, the Oregon Department of Education shall review the criminal records of a subject individual. The Superintendent of Public Instruction shall:

(A) Issue a statement of criminal history status; and

(B) Notify the private school if the subject individual has knowingly made a false statement as to conviction of a crime.

(b) A private school may choose to employ or contract with a person who has knowingly made a false statement as to conviction of a crime.

(5) The Superintendent of Public Instruction shall notify the private school if the subject individual has a conviction for any of the crimes listed in ORS 342.143, or the substantial equivalent of any of those crimes if the conviction occurred in another jurisdiction or in Oregon under a different statutory name or number. A private school may choose to employ or contract with a person who has a conviction for a crime listed in ORS 342.143 or the substantial equivalent.

(6) The Oregon Department of Education shall not provide copies of criminal records to anyone except as provided by law. The subject individual may inspect his or her personal criminal records under the supervision of properly certified LEADS personnel at the Department.

(7) The Oregon Department of Education shall maintain a record of all properly submitted fingerprint information. The record shall include at least the following:

- (a) Card Fingerprint sequence number;
- (b) Name of private school submitting the fingerprints;
- (c) Date the Department form is received;
- (d) Date fingerprint information is sent to Oregon State Police;
- (e) Date private school was notified of criminal history results.

Statutory/Other Authority: ORS 326.051 & ORS 326.603

Statutes/Other Implemented: ORS 326.603

581-045-0587 Non-employment criminal records checks for private schools

(1) Private schools that have volunteers that have direct unsupervised contact with students may have a policy requiring those volunteers to undergo a criminal records check.

(2) State criminal records check based on name and DOB:

(a) A private school may submit a request to the Oregon Department of Education for an in-state criminal records check in LEADS based on name and DOB on any volunteer.

(b) State criminal records check requests made under this section shall:

(A) Use forms provided by the Oregon Department of Education;

(B) Include an authorization from the volunteer for the Oregon Department of Education to perform a criminal records check; and

(C) Include payment of the processing fee of \$5 per person to be checked.

(3) State and national criminal records check based on fingerprints:

(a) A private school may submit a request to the Oregon Department of Education for a fingerprint-based criminal records check for volunteers identified in local policy as requiring a fingerprint-based criminal records check.

(b) Requests for fingerprint-based criminal records checks shall be submitted electronically through the statewide vendor identified by DAS. Exemptions from this requirement may be granted by the Oregon Department of Education on an individual basis. Reasons for exemption include, but are not limited to, geographic location and ability of vendor to meet needs. Private schools exempted from the electronic process shall submit fingerprints on forms provided by the Oregon Department of Education;

(c) A fee shall be established by the department, reviewed annually, and commensurate to cost changes to Oregon State Police or Federal Bureau of Investigation fee schedules and other costs associated with acquiring and furnishing criminal offender information. The fee shall of \$59 will be invoiced to the private school;

(d) A fingerprint-based criminal records check conducted in accordance with this section will be a state and national check through the Oregon State Police and the FBI.

(4) The Oregon Department of Education shall review the criminal records when a request is made under section (2) or (3) of this rule, make a fitness determination and notify the private school of that determination.

(a) A volunteer does not meet the fitness standards of this rule if the individual has:

(A) A conviction for any of the crimes listed in ORS 342.143, or the substantial equivalent of any of those crimes if the conviction occurred in another jurisdiction or in Oregon under a different statutory name or number; or

(B) Knowingly made a false statement.

(b) The Oregon Department of Education shall not provide copies of criminal records to anyone except as provided by law.

(5) Volunteers may appeal a fitness determination resulting from a fingerprint-based criminal records check under section (3) of this rule as a contested case under ORS 183.413 to 183.470 to the Superintendent of Public Instruction.

(6) Notwithstanding the fitness determination made by the Oregon Department of Education pursuant to this rule, a private school may allow a volunteer that has undergone a criminal records check to have direct, unsupervised contact with school children.

Statutory/Other Authority: ORS 326.051

Statutes/Other Implemented: ORS 326.607

Oregon State Board of Education

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AGENDA ITEM: 4.A.

<p>SUBJECT: OAR Updates for Fingerprinting Fees (581-021-0511, 581-021-0512, 581-045-0586, 581-045-0587) – Permanent Rules</p> <p>STAFF NAME & OFFICE: Brock Dittus & Shonna Bumgarner, Pupil Transportation & Fingerprinting</p> <p>Permanent rule proposed, identically matching the temporary rules approved at the December 2021 SBE meeting, allowing ODE to set a fee schedule based on actual costs of delivering fingerprinting criminal history background checks to partners.</p> <p><input type="checkbox"/> New Rule <input checked="" type="checkbox"/> Amend Existing Rule <input type="checkbox"/> Repeal Rule</p>	<p><input checked="" type="checkbox"/> First Reading <input checked="" type="checkbox"/> Presentation <input type="checkbox"/> No Presentation</p> <p><input type="checkbox"/> Action <input type="checkbox"/> Temp Rule <input type="checkbox"/> Presentation <input type="checkbox"/> No Presentation</p>
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BACKGROUND

The Oregon Department of Education processes fingerprinting background checks for all classified employees in school districts (including their contractors) as a requirement of law. Oregon Administrative Rule has established fees for these services. Increases in Oregon State Police’s fee schedule, through whom ODE accesses results of fingerprinting, as well as increases in labor cost, contribute to the need to raise the fees ODE charges its district partners to avoid a fiscal shortfall.

Current OAR text lists fees of \$59 per person for employees, congruent across both public and private schools. Attached revisions proposed to the OARs detail a removal of “\$59” as the established costs for fingerprinting background checks in rule text and provides for an established schedule of fees for this service to be drafted, adopted, and published as an office unit policy rather than a matter of rule. This would permit the unit to adjust fees as necessary to account for increase or decrease in fees from Oregon State Police & Federal Bureau of Investigation, as well as staff labor cost for processing, under ORS 181A.190(9)(b).

Statutory authority in ORS 181A.190(9)(b) provides for ODE to establish fees:

(b) Fees to be charged for conducting criminal records checks under this section in amounts not to exceed the actual costs of acquiring and furnishing criminal offender information.

An assessment of current income from fingerprinting background check fees compared to actual costs projected a significant fiscal shortfall, detailed below under “Fiscal Analysis.”

The board has discretion to amend OARs as is seen to be appropriate and responsible.

The director and subject experts in the Pupil Transportation & Fingerprinting Unit collaborated to draft the attached proposed changes. The draft was presented to the Rules Advisory Committee during their November 9, 2021 meeting for review.

Oregon State Board of Education

March 17, 2022

AGENDA ITEM: 4.A.

SUMMARY OF PREVIOUS BOARD ACTION

The State Board of Education approved temporary rules identical to those proposed for permanent rule.

HAS THE RULE CHANGED SINCE LAST BOARD MEETING?

- N/A; first read—hasn't been before board
- No; same as last month
- Yes – As follows:

POLICY ISSUE OR CONCERNS

Few concerns exist regarding the proposed changes. During presentation to the Rules Advisory Committee, questions were raised on whether the proposed changes would result in no upper limit to fees, or how often they could change. Our proposal does not negate the requirement of statute under ORS 181A.190(9)(b) that fees not exceed the actual amount of providing the service, and we would not intend to change our new fee schedule any more frequently than necessary to account for fees or significant cost of living increases accounting for staff labor cost.

No significant positive or negative effects are projected as a result of the proposed changes other than a slight increase in the cost per person to the school districts submitting fingerprinting applications.

EQUITY IMPACT ANALYSIS

No barriers to more equitable outcomes or any negative equity impacts have been identified.

FISCAL ANALYSIS

The fiscal impact of the proposed changes would be a commensurate increase to the increased cost of providing fingerprinting background checks to applicants. Fiscal analysis identified, at an average minimum of 2200 fingerprinting applications per month during the fall and winter seasons, a projected difference of \$15,400 per month in fee shortfalls not covered by the fees currently collected, resulting in a potential of a \$77,000 deficit over 5 months. These numbers illustrate the urgency of a fee adjustment and the reason immediate action is requested.

EFFECT OF A "YES" OR "NO" VOTE

A "yes" vote would allow ODE, on a permanent basis rather than a temporary basis, to establish a fee schedule that can be adjusted as needed for timely accounting of cost changes without State Board of Education action, and would prevent a fiscal shortfall resulting from the continued high volume of fingerprinting background submissions.

Oregon State Board of Education

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AGENDA ITEM: 4.A.

A “no” vote would result in a significant fiscal shortfall as detailed above following the expiration of the temporary rule.

STAFF RECOMMENDATION

Approve Approve next month No recommendation at this time
Prompted by: State law changes Federal law changes other

ATTACHMENTS

Attachment 1: DRAFT Background Check Fees OARs

581-051-0500

Purpose of Rules

These rules are adopted to assist ~~Oregon School Districts~~ National School Lunch Program, School Breakfast Program, Child and Adult Care Food Program, Summer Food Service Program, and USDA Donated Food Program Sponsors-Organizations in the development of contracts for Food Service Management Companies. ~~food service management services.~~

Statutory/Other Authority: ORS 326.051, 7 CFR 210.21, 7 CFR 210.16, 7 CFR 220.16, 7 CFR 220.7(d), 7 CFR 226.22, 7 CFR 226.21, 7 CFR 225.17, 7 CFR 225.15(m), 7 CFR 250.53 & 2 CFR 2007 CFR part 3015, 3016 & 3019

History:

ODE 19-2004, f. & cert. ef. 8-10-04

ODE 6-1999, f. & cert. ef. 1-12-99

581-051-0520

Scope of Rules

These rules apply to the solicitation, award, renewal, and execution of contracts between Sponsors and FSMCs within this State. ~~Agreements that provide only for the provision of food, without management, are not subject to these rules.~~

Statutory/Other Authority: ORS 326.051, 7 CFR 210.21, 7 CFR 210.16, 7 CFR 220.16, 7 CFR 220.7(d), 7 CFR 225.17, 7 CFR 225.15(m), 7 CFR 226.22, 7 CFR 226.21, 7 CFR 250.53, & 2 CFR 200 subpart D-7-CFR part 3015

History:

ODE 21-2004, f. & cert. ef. 8-10-04

ODE 6-1999, f. & cert. ef. 1-12-99

581-051-0555

Contract Renewal

The sponsor shall renew its contract with FSMC only if all of the following conditions are satisfied:

(1) The original contract allows for annual renewal and the total contract term does not exceed five years, original contract year plus four additional renewals years;

(2) The Sponsor consents to the renewal by action of the board;

(3) There is no change in financial terms, unless so designated in the original agreement. Contracts may not allow for an unlimited or discretionary change to the meal fee at renewal. Contracts may allow for an annual change to the meal fee not to exceed Consumer Price Index for All Urban Consumer Food Away from Home for the 12 months ending in March, 20 percent.

Statutory/Other Authority: ORS 326.051, 7 CFR 210.21, 7 CFR 210.16, 7 CFR 220.16, 7 CFR 220.7(d), 7 CFR 226.22, 7 CFR 226.21, 7 CFR 225.17, 7 CFR 225.15(m), 7 CFR 250.53, & 2 CFR 2007-CFR part 3015, 3016 & 3019

History:

ODE 24-2004, f. & cert. ef. 8-10-04

ODE 6-1999, f. & cert. ef. 1-12-99

Oregon State Board of Education

March 17, 2022

AGENDA ITEM: 4.B.

<p>SUBJECT: 581 OAR Revisions</p> <p>STAFF NAME & OFFICE:</p> <p>Current OARs are outdated and require technical fixes to update the OAR to the current Federal child nutrition program requirements for contracting with Food Service Management Companies.</p> <p><input type="checkbox"/> New Rule</p> <p><input checked="" type="checkbox"/> Amend Existing Rule</p> <p><input type="checkbox"/> Repeal Rule</p>	<p><input checked="" type="checkbox"/> First Reading</p> <p><input checked="" type="checkbox"/> Presentation</p> <p><input type="checkbox"/> No</p> <p>Presentation</p> <p><input type="checkbox"/> Action</p> <p><input type="checkbox"/> Temp Rule</p> <p><input type="checkbox"/> Presentation</p> <p><input type="checkbox"/> No</p> <p>Presentation</p>
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BACKGROUND

Include the following points for new OARs, OAR updates or changes.

1. History:
 - a. Several OARs were created to outline the requirements, set forth in Federal regulations, that sponsors of Federal child nutrition programs and Food Service Management companies must follow when contracting for the management and service of meals under child nutrition programs.
 - b. Since the rules were originally adopted, changes in Federal regulation and interpretation of this regulation have occurred. This requires revisions to our current OARs to ensure that the rules are in line with the regulation and the overall procedures that are in place currently.
2. Purpose
 - a. These rules outline the requirements surrounding the development and execution of contracts between sponsors of Federal child nutrition programs and Food Service Management Companies.
 - b. To my knowledge the rules have been in place since 1999, with updates in 2004.
3. Does the board have any areas of discretion or is this strictly mirroring statute?
 - a. The revisions are aligning with Federal statute
4. Stakeholder voice/input (individual and collective i.e., groups)
 - a. A technical advisory group was consulted. The group consisted of Food Service Management Company directors, school district business managers and finance directors.
 - b. There was discussion of the proposed changes and all were in favor of the revisions.
 - c. The groups impacted by the changes are the sponsors of child nutrition programs and the Food Service Management companies; however, the impact is negligible as the revisions are meant to align with the practice that is currently in place.

Oregon State Board of Education

March 17, 2022

AGENDA ITEM: 4.B.

SUMMARY OF PREVIOUS BOARD ACTION

1. These revisions have not been before the board before.

HAS THE RULE CHANGED SINCE LAST BOARD MEETING?

- N/A; first read—hasn't been before board
 No; same as last month
 Yes – As follows:

POLICY ISSUE OR CONCERNS

These policy issues or concerns could be from the field, stakeholder groups, statements submitted during the comment period, or discussions among ODE staff. Consider the following questions:

1. Stakeholders
 - a. We have involved those stakeholders affected by the revisions.
2. Negative/Positive Effects
 - a. The impact of the revisions is negligible as it is aligning with current practice.

EQUITY IMPACT ANALYSIS

The following questions are designed to examine how the proposed rule, policy or action systematically affect historically underserved students and/or communities.

1. As these practices are currently in place due to Federal regulation, no additional impact should be incurred.

FISCAL ANALYSIS

What is the fiscal impact of the proposed rule changes to the Department of Education, school districts, education service districts or schools? Use the following suggestions as a guide:

1. No Fiscal impact to the department

EFFECT OF A "YES" OR "NO" VOTE

A yes vote will ensure that the current Administrative Rules in Oregon align with the Federal requirements and guidelines set forth for programs under Federal Child Nutrition Programs.

STAFF RECOMMENDATION

- Approve Approve next month No recommendation at this time
Prompted by: State law changes Federal law changes other

Oregon State Board of Education

March 17, 2022

AGENDA ITEM: 4.B.

ATTACHMENTS

Attachment 1: Division 51 OARs FSMC

DRAFT CREATED BY TB

581-022-2250 District Improvement Plans

(1) For the purposes of OAR 581-022-2250 the following definitions apply:

(a) “Aligned with standards” means that the taught curriculum (what teachers teach), the learned curriculum (what students learn), and the assessed curriculum (what students are tested on) as identified through state and national academic standards do not deviate significantly from one another. This alignment includes four components:

(A) Content match — topical coverage, or comprehensiveness and level of detail

(B) Depth match — level of difficulty, or cognitive complexity

(C) Emphasis match — the relative duration of the instruction about each topic/standard within a subject

(D) Performance match — the type of performance required to demonstrate proficiency of the standard

(b) “Data-driven” means the use of information available from a high quality data system to focus decisions regarding curriculum, instruction, staff assignment, and staff development to promote student achievement through a planned, systemic program improvement effort.

(c) “Family and community engagement” means a system of shared responsibility in which schools and other community agencies and organizations are committed to engaging families in meaningful and culturally respectful ways while families are committed to actively supporting their children’s learning and development.

(d) “High quality data system” means a method by which teachers and administrators have access to data needed for instructional and administrative decision-making, one that makes available to the public appropriate data content and displays and provides for regular updates to the data, maintenance and upgrading of the system, and training for key personnel on use and maintenance. The collection and use of data in such a system would include district-, school-, and student-level data describing but not limited to:

(A) Instruction;

(B) Accountability;

(C) Demographics;

(D) Achievement; and

(E) Assessment.

(e) “High quality instructional programs” means that teachers teach knowledge and skills through the use of an appropriate variety of instructional strategies reflecting best practice and based on state/national standards and assessments that effectively measure what the standards require. Such instruction is not universal but is situational based on instructional context.

(f) “Long-term professional development plans” means teacher training reflecting best practice as defined by national standards related to content, process, and context. Such training supports:

(A) Continuing advancement of professional collaboration;

(B) Ongoing, job-embedded experiences,

(C) Standards-based instruction, and

(D) Continual, guided reflection on school/student data a part of professional learning.

(g) “Rigorous curriculum” means multiple courses of study any one of which will prepare students to successfully meet the Oregon diploma requirements. These courses are cognitively demanding and challenging to students as those students apply the fundamental concepts and skills from various disciplines to real world problems in complex and open ended situations.

(h) “Safe educational environment” means a healthy, positive school climate free of drug use, gangs, violence, intimidation, fear, and shaming, ensuring the physical and emotional well-being and academic and social growth of every student.

(i) “Service plans for students” means a system of planned services outlining student educational activities, supporting students in meeting expectations for one or more content areas and continuing to academically challenge students who have exceeded expectations in one or more content areas.

(j) “Short-term professional development plans” means a component of a long term professional development plan with a direct connection with one or more of the following—individual continuing professional development plans; board, district or school goals; state certification criteria; or other regulatory mandates. Such plans may be responsive to emerging needs not yet addressed in long-term professional development plans.

(k) “Staff leadership development” means practices, policies, and procedures that create shared leadership opportunities and empower teacher participation in setting and achieving school goals and policies.

(l) “Strong school library program” means a planned effort to ensure the instruction of students, school staff, and the broader learning community in library skills, information literacy, and educational technology; such a program promotes a rich array of literacy experiences supporting life-long reading; facilitates collaboration in lesson planning and instruction; ensures equitable access to library resources and licensed school librarians; and develops and manages current, plentiful, and diverse library collections of print and electronic resources that support classroom curricula and student interests.

(2) Each school district shall conduct self-evaluations in order to develop and update their local district continuous improvement plans once every ~~three~~-four years. Except as provided in subsection (3) of this rule, the department may not require school districts or schools to conduct self-evaluations or to update their local district continuous improvement plans more frequently than biennially.

(3) Each school district shall:

(a) Submit its local district continuous improvement plan to the Department of Education once every ~~three~~-four years unless there are substantial changes.

(b) Notify the Department and update its local district continuous improvement plan when there has been a substantial change.

(c) Substantial change is defined as changes to:

(A) School or district improvement status under state or federal law;

(B) Student academic achievement;

(C) Student demographics (including changes in excess of 10% in identified subgroups);

(D) Instructional staffing (either counts of personnel or changes in individual staff);

(E) Financial resources available to the district; or

(F) The district's goals for student achievement.

(4) The self-evaluation process shall involve the public in the setting of local goals. The school district shall ensure that representatives from the demographic groups of their school population are invited to participate in the development of local district continuous improvement plans to achieve the goals.

(5) As part of setting local goals, school districts shall undertake a communications process that involves parents, students, teachers, school employees and community representatives to explain and discuss the local goals and their relationship to programs in the continuous improvement plan.

(6) At the request of the school district, department staff shall provide ongoing technical assistance in the development and implementation of the local district continuous improvement plan.

(7) The local district continuous improvement plan shall include:

(a) A rigorous curriculum aligned with state standards;

(b) High-quality instructional programs;

(c) Short-term and long-term professional development plans;

- (d) Programs and policies to achieve a safe educational environment;
 - (e) A plan for family and community engagement;
 - (f) Staff leadership development;
 - (g) High-quality data systems;
 - (h) Improvement planning that is data-driven;
 - (i) Education service plans for students who have or have not exceeded all of the academic content standards;
 - (j) A strong school library program;
 - (k) A review of demographics, student performance, staff characteristics and student access to, and use of, educational opportunities; and
 - (l) District efforts to achieve local efficiencies and efforts to make better use of resources.
- (8) Each school district shall annually review and report test results and progress on the district improvement plan to the community.
- (9) Each school district shall maintain copies of the school and district improvement plans as a public record.
- (10) Each school district shall submit the district improvement plan to the Department of Education when requested.

Oregon State Board of Education

March 17, 2022

AGENDA ITEM: 4.C.

<p>SUBJECT: Continuous Improvement Plans (CIP) Rules Alignment 581-022-2250 STAFF NAME & OFFICE: Tim Boyd, (District and School Effectiveness)</p> <p>These rules pertain to district Continuous Improvement Plans (CIP) requirements, specifically aligning timelines for submission to align with the Aligning for Student Success Integrated Guidance work.</p> <p><input type="checkbox"/> New Rule <input checked="" type="checkbox"/> Amend Existing Rule <input type="checkbox"/> Repeal Rule</p>	<p><input checked="" type="checkbox"/> First Reading <input checked="" type="checkbox"/> Presentation <input type="checkbox"/> No Presentation</p> <p><input type="checkbox"/> Action <input type="checkbox"/> Temp Rule <input type="checkbox"/> Presentation <input type="checkbox"/> No Presentation</p>
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BACKGROUND

Include the following points for new OARs, OAR updates or changes.

1. History

In February, 2022, the Office of Education Innovation and Improvement (EII) launched the Aligning for Student Success Integrated Guidance. This effort seeks to align six programs administered in EII – High School Success (HSS), Student Investment Account (SIA), Continuous Improvement Planning (CIP), Career and Technical Education - Perkins V (CTE), Every Day Matters (EDM), Early Indicator and Intervention Systems (EIIIS) – including process requirements for community engagement, plan development, submission and reporting.

2. Purpose

The purpose of the rule revision is to adjust timelines for the submission of CIPs from once every three years to once every four years, bringing this program into alignment with the Integrated Guidance.

3. Does the board have any areas of discretion or is this strictly mirroring statute?

The State Board of Education has discretion to develop rules that pertain to submission timelines.

4. Stakeholder voice/input (individual and collective i.e., groups)

HAS THE RULE CHANGED SINCE LAST BOARD MEETING?

- N/A; first read—hasn't been before board
 No; same as last month
 Yes – As follows:

Oregon State Board of Education

March 17, 2022

AGENDA ITEM: 4.C.

POLICY ISSUE OR CONCERNS

These policy issues or concerns could be from the field, stakeholder groups, statements submitted during the comment period, or discussions among ODE staff. Consider the following questions:

1. *Stakeholders*

- a. *How have you intentionally involved stakeholders who are also members of communities affected by this rule?*

Community engagement has been broad and situated with the development and launch of the Integrated Guidance. The changes to the rule are small, but significant in aligning this requirement with the aforementioned initiatives.

- b. *Who are the historically underserved groups affected?*

The proposed changes will not have any immediate or direct impact on underserved groups.

- c. *If the rule change or policy decision has tribal implications and it has been deemed appropriate by the Department's Tribal Liaison, the Deputy Superintendent, or State Board, has there been engagement or collaboration with tribes in this rule change or policy decision?*

To date, the need to formally engage with tribes has not been decided. That said, there is strong support for the broader alignment effort and additional opportunities for collaboration.

- d. *How has the Oregon Department of Education modified or enhanced the rule change or policy decision to address the needs of historically underserved communities?*

The proposed rule change strengthens community engagement and community voice in voicing needs, developing priorities and subsequent plans for the aforementioned initiatives.

2. *Negative/Positive Effects*

- a. *What is the impact on the population most affected by this rule that the board should consider?*

Changing the submission timelines for the CIP in order to bring this program into alignment has significant impact on community and staff engagement as well as on the school district personnel responsible for addressing the requirements of this and other programs. In our current context, one additional year of engagement (pushing the submission timeline to March, 2023) will support more robust planning to safeguard community voices and input.

- b. *What is the impact on eliminating the opportunity or achievement gap?*

Oregon State Board of Education

March 17, 2022

AGENDA ITEM: 4.C.

The rules changes for CIP requirements bring both alignment and a level of accountability to eliminating opportunity and achievement gaps. Historically, the accountability for district CIPs has been light, with plans reviewed to ensure they meet minimum requirements. The shift in timeliness and the integration will support more robust support for and accountability to eliminating opportunity and achievement gaps.

c. *Have all the potential unintended consequences been considered?*

To the best of our ability, we've explored and attempted to address unintended consequences of this program and proposed rules.

d. *Does this rule advance the 40/40/20 goals?*

As mentioned above, the integration efforts and rule revisions truly enhance the drive to achieve 40/40/20 goals. Several programs attempted to move these goals forward, but in isolation. With these changes and efforts, the 40/40/20 goals are better supported.

3. *What are the barriers to more equitable outcomes, either:*

The program is expressly aimed at addressing the barriers that will lead to more equitable outcomes. The success teams are designed to review progress, examine barriers preventing goals from being met, and strategize to alleviate those barriers.

EQUITY IMPACT ANALYSIS

By operationally aligning these programs, including the requirements for district CIPs, we have the opportunity to focus resources to truly advance equity and to support school districts and communities in monitoring and adjusting plans to ensure strategies and activities are having meaningful and timely impacts on focal students and communities.

FISCAL ANALYSIS

ODE anticipates that these proposed rule changes would have a positive fiscal impact on participating school districts (and their schools) given the alignment of programs and hopefully, the reduced administrative burden experienced in the past.

These rules have no significant fiscal impact on ODE and ESDs.

EFFECT OF A "YES" OR "NO" VOTE

Oregon State Board of Education

March 17, 2022

AGENDA ITEM: 4.C.

Approving these rules is a small, but essential need in aligning the initiatives described above.

Not approving the rule change would keep the timing for CIP submissions out of sync and disconnected from other programs and alignment efforts.

STAFF RECOMMENDATION

Approve Approve next month No recommendation at this time

Prompted by: State law changes Federal law changes other

ATTACHMENTS

Attachment 1: [DRAFT OAR 581-022-2250 District Improvement Plans.docx](#)



**ALIGNING
FOR STUDENT
SUCCESS:
INTEGRATED GUIDANCE
FOR SIX ODE INITIATIVES
2022**



**OREGON
DEPARTMENT OF
EDUCATION**

Oregon achieves . . . together!



Oregon

Kate Brown, Governor



OREGON
DEPARTMENT OF
EDUCATION

Oregon achieves . . . together!

Colt Gill

Director of the Department of Education

February 8, 2022

Providing equitable access to an excellent education to each and every child is a moral imperative and, as educators, it is a responsibility we must own and embrace. It calls for professionals, leaders of all walks of life, families, and communities to find shared understanding, time, and the will to mobilize on a daily basis and to surround young people with the love, care, nourishment, intellectual challenges, and connection they need to thrive.

Despite the many challenges of the last few years, I know how dedicated thousands of Oregonians are to this daily effort and to the vision of what is possible if we can find ways to move even more powerfully together.

This document reflects hope going forward.

Guidance is a technical word which describes how a state agency explains, coordinates, and administers the programs that have been passed into law by the legislature or federal government and into administrative rules through the State Board of Education.

This guidance accomplishes those aims while also aligning six separate federal and state programs that belong beside each other to the point that they could be experienced by students, educators, and communities as a single, comprehensive effort.

What our staff at ODE has set out to do, with noted hope from the legislature and the education field, is to *operationally* align investments and work that can indeed bring increased success for students and lay the groundwork for us to see the full value and desired impact of the investments in the Student Success Act passed in 2019.

Schools hold responsibility for student mental health and wellbeing in the ways they design and approach relationship-centered schools focused on belonging, school climate, identity, and instruction. There should not be any separation in social, emotional, and academic learning.

This guidance offers district and school leaders the information and tools needed to engage community, assess needs, plan well, and implement programs that provide a needed 10% boost (approximately) over Oregon's base state school fund. These additional funds carry promise that shape and support strategies and planning with a more substantial scale and impact than was possible in Oregon just a few years ago. These investments move us closer to the funding levels called for in Oregon's Quality Education Model than at any previous time in Oregon's

history. We need that now. We need a way for communities, young people, educators, health professionals, and school leaders to listen, reset, and find the best ways to move forward.

I personally hope we can celebrate this long-needed alignment and what I see as a first big step towards a new horizon for Oregon's schools and students.

Sincerely,

A handwritten signature in blue ink, appearing to read "Colt Gill".

Colt Gill
Director of the Oregon Department of Education and
Deputy Superintendent of Public Instruction

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Provides high-level information as a quick reference for district and program leaders. It provides broader context for the more technical sections that follow. It includes a summary of the 12-step application process and program summary briefs. The information below may also be a helpful resource when providing school board members, families and community members information about planning processes.

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SECTION 2: EFFECTIVE PLANNING 35

This section outlines the preparation needed, the specific process requirements, and the tasks that applicants will engage in to inform development and prepare for the integrated plan submission in **March 2023**. Information in this section offers explanations of planning requirements inclusive of any needed documentation or artifacts for the final application as well as outlines applying in consortia, with additional resources and tools linked in or included in the appendices.

SECTION 3: FINANCIAL STEWARDSHIP 48

This section provides both the information and key templates to match resources to your planning. This includes explaining basic resource flows, braiding and blending of funds, and detailed information about the required Integrated Planning and Budget Template. A core goal of this guidance is to support districts and school communities to see and understand how resources can support their strong planning while interrupting the habit of reactively planning for funds as they’ve been parsed through state programs.

SECTION 4: PREVIEW OF THE INTEGRATED APPLICATION 56

This section provides the information that ODE will ask applicants to submit during the application submission window scheduled for March 1, 2023 to March 31, 2023.

SECTION 5: HOW APPLICATIONS WILL BE REVIEWED, EVALUATED, DEVELOPED, AND FINALIZED 62

This section describes the values and processes applications will move through to complete review.

SECTION 6: MEANINGFUL REPORTING, MONITORING, AND EVALUATION PROCESSES 68

This section describes an integrated approach to reporting, monitoring, and evaluation of impact and performance across the six aligned programs. This includes attention to local optional metrics, the skilled use of early indicator and intervention systems, meeting state CTE Perkins Performance Targets, working with Progress Markers, developing and finalizing Longitudinal Performance Growth Targets, and quarterly and yearly reporting. The responsibility and opportunity to share a performance review back to your community and board, revisiting if investments reached outcomes you were aiming for, is outlined. This section also includes information about the auditing steps required only under the Student Investment Account.

SECTION 7: GETTING BETTER: SUPPORT AND IMPROVEMENT OPPORTUNITIES AND EXPECTATIONS 84

The guidance below outlines the continuum of resources and activities that will be available over the course of the upcoming biennium to support the planning, implementation, monitoring, and evaluation of the six integrated programs. Included is an overview of the calendar, the process for accessing offerings, as well as several example offerings. The last portion of this section describes the process for instances where a school or district does not meet requirements or intervention is required in implementation.

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INTRODUCTION

Over the last six years,

Oregon has made and received significant financial investments for students, educators, and communities. Amidst the triage of responding to the COVID-19 pandemic and while tending to the impacts of chronic poverty, mental health challenges, and racism, Oregon's educational systems have been pushed and challenged. Under pressure, significant strengths and also significant limitations have come into view community by community and region by region.

This document is responsive to hundreds of requests from educational and community leaders that ODE make a step toward aligning and integrating separately created federal and state educational investments focused on educational innovation and improvement. This new guidance is provided more than a year ahead of when applications under this guidance will be submitted to ODE in March 2023. The timing of release is intended to give the time needed for grant applicants (districts and schools) to prepare and operationally align their internal planning for these state and federal programs.

This guidance integrates six aligned programs¹:

- High School Success (HSS)
- Student Investment Account (SIA) within the Student Success Act
- Continuous Improvement Planning (CIP)²
- Career and Technical Education - Perkins V (CTE)
- Every Day Matters (EDM)
- Early Indicator Intervention Systems (EIS)

Bringing six programs together operationally³ creates significant opportunities to improve outcomes and learning conditions for students and educators. Working within existing state statutes and administrative rules, ODE developed a framework for success that meets the core purposes of each program while trying to create a stronger framework from which we can mark progress, look for long-term impacts, and develop the learning approach to monitoring and evaluation that is a hallmark of high-performing educational systems⁴.

One of the aims of this effort is to significantly decrease administrative burden and administrative confusion while putting forward a single application and combining processes for planning, needs assessment, community engagement, budgeting, and evaluation.

It is easy to get lost in the details, even when the details matter.

- 1 In most cases, this guidance replaces other program guidance previously released. Where additional guidance is still relevant it is linked and noted within this document.
- 2 **Please note:** This should not be confused with "CIP Budget Narratives" required to access Federal Programs and Title funding which remain on prior timelines and will continue to open annually in August.
- 3 Six programs is nowhere close to the 105 federal and state programs ODE administers and there is natural alignment with more than just the six programs this guidance covers. This effort reflects where operational alignment could be reached amidst programs with shared aims, statutory language, and program designs without requiring changes in statute.
- 4 Schleicher, A (2018), World Class: How to build a 21st-century school system, Strong Performers and Successful Reformers in Education, OECD Publishing, Paris. <https://www.oecd-ilibrary.org/docserver/9789264300002-en.pdf?expires=1643217352&id=id&accname=guest&checksum=C8FAE460D88BB61319D59AB09649ADC9>

The headline is that students, communities, educators, school leaders, and postsecondary, business, and industry partners now have the opportunity and responsibility to plan and integrate these programs and funding streams in a way that improves the well-being, health, climate, quality of instruction, and outcomes for each and every student in Oregon with dedicated attention to focal student groups. By aligning these systems and programs, our hope is to create more time and less complicated ways for educational leaders to support students.

This guidance is written for school districts, charter schools, Youth Corrections Education Programs (YCEPs), Juvenile Detention Education Programs (JDEPs), the Oregon School for the Deaf, Education Service Districts (ESDs) and community partners.

Districts and schools identified for Comprehensive Support and Improvement (CSI) and Targeted Support and Improvement (TSI), collectively referred to as “ESSA Partnerships,” should utilize all of the guidance in this document along with the [Appendix G](#) which offers additional detail.

Finally, it is worth noting that Oregon’s federally approved plan for the Elementary and Secondary School Emergency Relief Fund III (ESSER III) relies upon the actions and engagement public school districts do under this guidance to satisfy essential requirements even while planning, budgeting, and financial reporting happen separately at this time.

IN SUPPORT OF SMALL AND RURAL DISTRICTS

Resources from the Governor’s Emergency Education Relief Act have been allocated to provide additional administrative support and relief to Oregon’s smallest districts through dedicated technical assistance dollars for each Education Service District. The focus of this effort is to provide differentiated and intensive support to small districts with limited personnel capacity, in moving through state or federal alignment or administrative processes, including but not limited to this guidance.

Specific callout boxes are placed in this guidance to also note specific adjustments or accommodations for districts with an Extended ADMw⁵ of 100 or lower.



5 ORS 327.013 explains Average Daily Membership weighting and extended ADMw.

TIMELINE

A high-level timeline from now to grant agreements and the beginning of implementation under this guidance.

Spring 2022: Learn & Prepare - Time to digest this new guidance and do internal planning and budgeting to support the planning and engagement processes that follow

Fall 2022: Engage & Assess - Engage community, focal student groups, families, tribes, and educators. Identify patterns in community feedback and data while completing a comprehensive needs assessment

Fall/Winter 2022: Develop & Plan - Review engagement input, apply equity lens; consult the best practice recommendations from Quality Education Commission (QEC) reports and SSA Student Success Advisory Plans; consider ESSER III engagement feedback; review regional labor market information and regional CTE priorities with CTE regional coordinator; create plan and budget; use continuous improvement tools to workshop and develop plans, budget, and application - include outcomes, strategies, activities, and growth targets

Jan-Feb 2023: Finalize - Produce Integrated Budget, Plan and Application; post to community for comment, present and have board approve prior to submission

March 2023: Apply - Application Window opens from Wednesday, March 1 through Friday, March 31 for submitting four-year plans covering 2023-2027 with budgeted and focused plan for the 2023-25 biennium

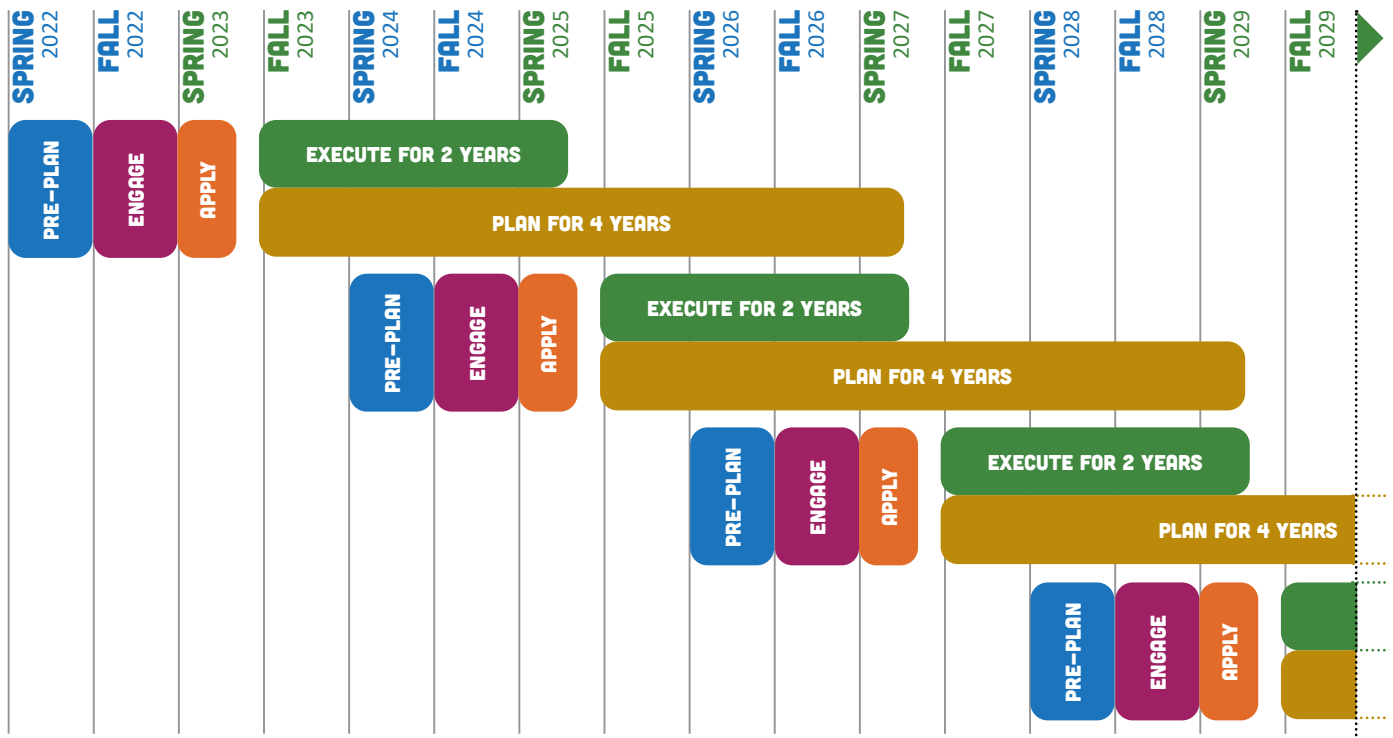
April 2023: Review - ODE reviews applications, co-develops and finalizes required targets while engaging community and educators through Quality Assurance Learning Panels (QALP)

July 2023: Grants Finalized: Grant agreements finalized for all relevant programs and implementation begins

Setting a Consistent Long-term Rhythm

Legislative intent imagines a consistent implementation cycle for these programs.

The following graphic illustrates how this guidance is implemented over the next decade.



SECTION 1: INTEGRATING SIX PROGRAMS



OREGON
DEPARTMENT OF
EDUCATION

SECTION 1: INTEGRATING SIX PROGRAMS

Section Snapshot

Section 1 provides high-level information as a quick reference for district and program leaders. It provides broader context for the more technical sections that follow. It includes a summary of the 12-step application process and program summary briefs. The information below may also be a helpful resource when providing school board members, families and community members information about planning processes.

A COMPREHENSIVE INVESTMENT IN EDUCATION INNOVATION AND IMPROVEMENT

Taken together, these six programs target four common goals⁶:

EQUITY ADVANCED

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

- Examine and address systems, structures, practices, behaviors, and mindsets related to power, privilege, and oppression.
- Utilize and re-allocate financial resources and clear calls to action to create school climates, communities, and curriculums that see and sustain each and every child.
- Collect and analyze state, regional, and local data while engaging communities to drive improvement efforts.
- Address the root causes of chronic absenteeism.
- Promote a focus on closing long-standing opportunity and achievement gaps.

ENGAGED COMMUNITY

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

- Tend to long-standing harm or impact that marginalized communities have experienced.
- Listen and respond to community-driven needs and knowledge.
- Deepen schools' connections with their communities through intentional, authentic, and frequent engagement of students, families, educators, school staff, advocates, tribal partners, community-based organizations, business and industry partners, and elected leaders including school board members.
- Cultivate and strengthen connections between community organizations, businesses, Education Service Districts, tribal partners, community colleges, professional associations, and support service agencies to create a thriving educational ecosystem.

⁶ These goals are also aligned to [Oregon's State ESSA Plan](#).

- Facilitate meaningful engagement with licensed, classified, and unrepresented staff including district and school administrators.
- Sustain ongoing engagement and consultation (no checkmarks!).

WELL-ROUNDED EDUCATION

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

- Build relevant and authentic learning experiences for students.
- Build connections, networks, and pathways for students' continued success after graduation.
- Ensure access to a wide-array of nourishing electives and learning experiences.
- Foster avenues for students, tailored to those who educational systems have marginalized, to share and communicate their dreams/aspirations at all levels, including a clear picture of their contributions and a plan, as well as skills to implement as they transition from one grade to another and after high school graduation.
- Apply personalized learning and universal design principles to meet the unique needs and ensure strong growth of each individual student on a real-time basis through professional learning opportunities, coaching, resource allocation, and policies.
- Provide instruction, modeling, and classroom norms that promote students' social competency and self-efficacy.
- Create professional learning opportunities, coaching, resource allocation, and policies for adults that model the conditions desired for students.

STRENGTHENED SYSTEMS AND CAPACITY

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

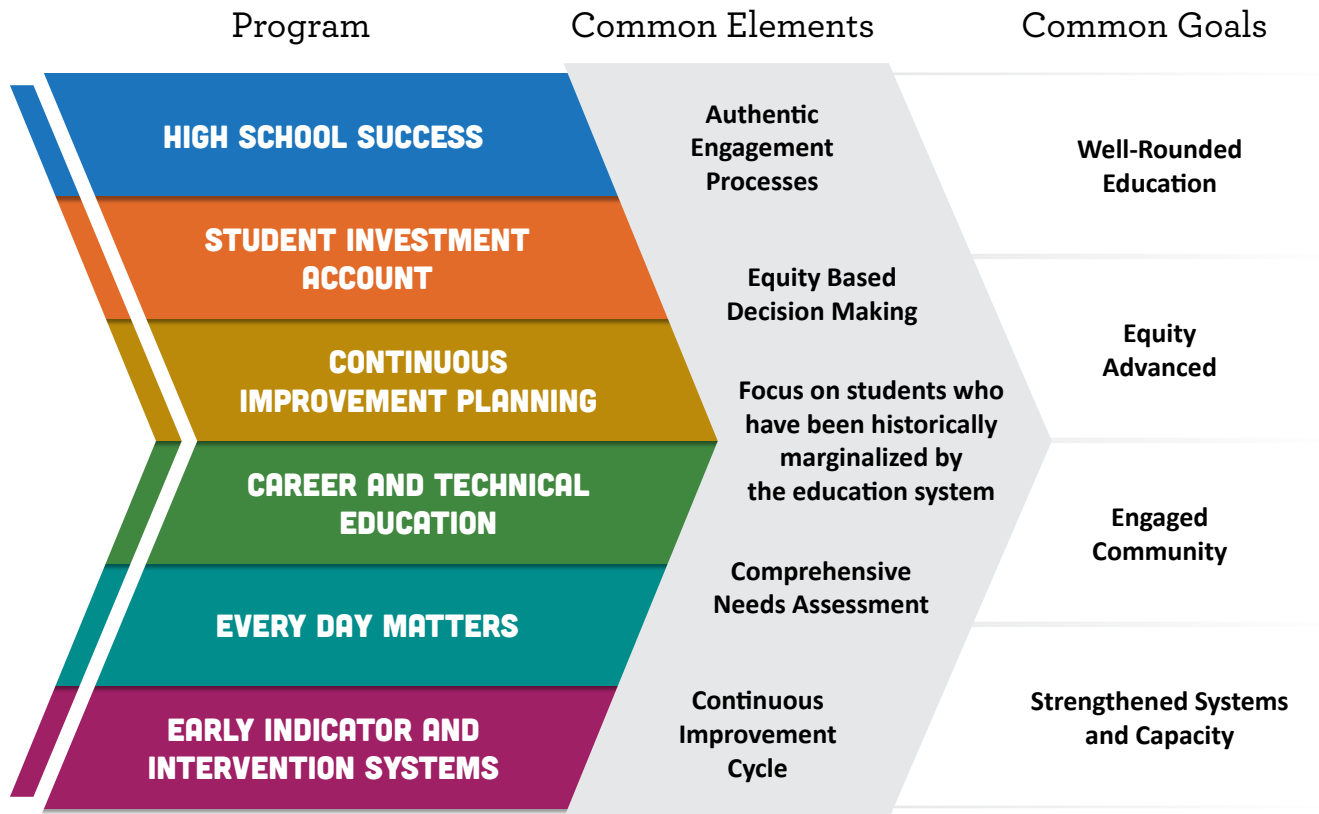
- Leverage continuous improvement practices to redesign for educational processes that center care, connection, and relationship.
- Grow and utilize district, school, region, and community assets to coach towards culturally sustaining pedagogy and practice.
- Foster financial stewardship that accepts responsibility for the use of state and federal funds with integrity and purpose, while also centering student and community voices in resource allocation.
- Support strengths-based reporting, monitoring and evaluation practices in service to a continuous improvement process, including how we collect, analyze, use, and share data.
- Lead to the recruitment, hiring, development and retention of racially and linguistically diverse educators that represent students being served.
- Apply data-informed decision-making routines to review progress and goals at both district and school levels.
- Use data to describe systems health, perceptions, disaggregated student outcome data, transition points, staff evaluation feedback, educational community and partner input.

COMMON PROGRAM ELEMENTS AND GOALS

Integration is possible for these six initiatives⁷ because of what they have in common. While each program can be pulled apart (and has been historically), this guidance brings them together so applicants, schools, and programs can leverage multiple strategies and funding sources to implement more cohesive plans that positively impact students.

Moving forward, the outcomes and strategies for each initiative will come together into a single strategic plan that supports the common goals. The aim is to build these goals into the entire educational system to embed the work at all levels and ensure sustainability.

The following visual helps illustrate these common elements and goals that allow for alignment:



⁷ Programs and initiatives will be used interchangeably.

A 12-STEP SUMMARY OF THE PLANNING AND APPLICATION PROCESS

These steps are presented to help leaders plan and sequence their efforts. In reality, all of these steps are interrelated and intersecting. For example, after an initial plan is developed and resourcing considered, additional community, student and staff engagement is best practice and would be valuable before finalizing submissions. Even if all ideas and needs don't make a final plan, it builds trust and honors the input solicited to share back what is put forward in the final application.

The steps are a high-level summary with more detailed information in the sections and pages that follow. These steps can ensure that you make the most of the opportunity to be more efficient and effective as you bring your work on these six programs together. *You are welcome to adapt or improve on what is offered here while meeting the core requirements under this guidance.*

A 12-Step Summary of the Planning and Application Process



Step 1: Organize your thinking and prepare for planning. Review this guidance. Review previous self-assessments you've completed during prior processes. Get the right people engaged as a planning team, advisory, or small work group, depending on the size of your district/region and community. If your district or school is part of a CTE consortium, engage with your partners at the regional level, particularly your CTE Regional Coordinator.

Step 2: Prepare accessible materials in "plain-language" for community and staff engagement, including ways to collect information and the human resources to complete the comprehensive needs assessment.

Step 3: Engage students, staff and community. Be sure to engage focal student groups and their families, staff, and key business and community partners. This is an ongoing task. Build on prior efforts, including work you've done with family coordinators to address student engagement and chronic absenteeism. Deepen your practices and follow-up. [Use this updated community engagement toolkit](#) as your primary resource.

Step 4: Complete a comprehensive needs assessment. We've brought together CTE, HSS, and other continuous improvement tools into a single framework you can use to support your planning. Keep in mind the important inter-relationship of community engagement and partnerships in getting to a shared assessment of needs.

- Step 5: Move through all process requirements while building a community informed four-year plan⁸.** Detailed more fully in Section 2, you are determining how to use different funding sources to meet several different priorities and outcomes that are interrelated. This requires consistent use of an equity lens. You'll want to review disaggregated data, [QEC best practice recommendations](#), CTE regional priorities, Student Success Act Statewide plans⁹, prior plans and promises made to staff and community, your new engagement feedback, your needs assessment, your ESSER III engagement, plan, and budget, and the overall aims and purposes of your district/region and its schools and programs.
- Step 6: Develop desired outcomes.** Outcomes are the changes in health, behavior, actions, attitudes, or policies that impact students, educators, people, groups and organizations with whom your work is in relationship with.
- Step 7: Articulate what strategies you will maintain or pursue to generate desired changes.**
- Step 8: Get feedback on desired outcomes and strategies.** This is a key opportunity to engage and review your foundational planning before you get into details while testing and checking your plan through community, staff, and using the tools and information in Steps 4 and 5. Take this opportunity with your shared leadership team to reflect on prior initiative successes or challenges that will inform an aligned plan. If part of a regional CTE Consortium, make sure to work closely with the CTE Regional Coordinator to inform both local and regional goals, outcomes and strategies.
- Step 9: Gather and generate the activities and investments that identify your strategies and will lead to the changes you hope to cause or maintain.** A systemic approach to gather and sort these ideas will be helpful. We've created an [Integrated Planning and Budget Template](#) to assist you.
- Step 10: Write and document your plan and application.** You'll be bringing together processes for six programs that may have previously been discrete. You'll be writing with more detail into your activities, budget, and naming Longitudinal Performance Growth Targets (LPGTs) that run alongside meeting state and federal eligibility requirements and any local optional metrics. You'll be presenting the whole of the plan and budget to your school board and posting it for the public to review.
- Step 11: Check your plan.** Re-check it against your equity lens. Fine tune how you braid and blend funds to get the best outcomes to match your priorities. Use this guidance and the tools in the appendix to make sure your expenses are allowable and you meet the requirements. Take one more look at the plan against the information you've previously gathered. Consider holding another round of student, community, partner, and staff engagement to get final inputs.
- Step 12: Submit your plan.**

⁸ Districts are highly encouraged, over time, to align any and all strategic planning processes to the timing and rhythms within this guidance rather than running separate and distinct strategically planning efforts. This would mean that four-year plans required under guidance are also the continuous improvement plan and the strategic plan for a district.

⁹ SSA Statewide Plans - [African American/Black Student Success Plan](#), [American Indian/Alaska Native Student Success Plan](#), [Latino/a/x and Indigenous Student Success Plan: Phase 1](#), [LGBTQ2SIA+ Student Success Plan](#).

SUMMARY OF EACH INTEGRATED PROGRAM

There are important distinctions to understand between each program. [Appendix H](#) provides rigorous program-by-program details where additional nuance is needed. The following summaries offer essential information to support your integrated planning.

► HIGH SCHOOL SUCCESS (HSS)

High School Success is a fund initiated by ballot Measure 98 in November 2016. Research suggests^{10 11 12} that having the system structures HSS requires aids in increasing graduation rates and ensures high school graduates are ready for their next step into college or career. The last several years of High School Success grant funding tells a story of collective commitment -- one where local schools and communities partner together -- working to create a more equitable, well-rounded and engaging education system. **The budget statewide for 2021-23 is \$307,323,223.**

Goals	Program Requirements	Allowable Fund Uses
<p>Improve student progress toward graduation beginning with grade 9</p> <p>Increase high school graduation rates</p> <p>Increase equitable access to advanced coursework</p> <p>Improve high school graduates' readiness for college and career</p>	<p><i>Who is eligible?</i> School districts, schools, charter schools, virtual charter schools, consortiums, YCEPs/JDEPs, and Oregon School for the Deaf</p> <p><i>Eligibility Requirements:</i></p> <p>Provide sufficient time for teachers and staff of students in grade 9 to review data on students' grades, absences, and discipline by school and by course and to develop strategies to ensure at-risk students stay on-track to graduate</p> <p>Implement district-wide evidence-based practices for reducing chronic absenteeism in grades 9 through 12</p> <p>Assign and provide equitable access to high school students to advanced and dual-credit courses based on academic qualifications in order to avoid bias in course assignments</p> <p>Implement systems to ensure that high school students, including English Language Learners, are taking courses required for on-time graduation</p>	<ul style="list-style-type: none"> ▪ Funding is provided to establish or expand programs in three specific areas: ▪ Dropout Prevention ▪ Career & Technical Education¹³ ▪ College-Level Education Opportunities <p>Up to 15% of allocation is allowable for 8th grade spending</p>

10 Allensworth and Easton (2005; 2007); Neild and Balfanz (2006a; 2006b). Stuit, O'Cummings, Norbury, Heppen, Dhillon, Lindsay, and Zhu (2016).

11 Balfanz, Herzog, & Mac Iver, 2007; Balfanz, Wang, & Byrnes, 2010.

12 Roderick, Kelley-Kemple, Johnson, and Beechum (2014). <https://consortium.uchicago.edu/sites/default/files/publications/On-Track%20Validation%20RS.pdf>

13 HSS investment in CTE must be for approved CTE Programs of Study.

▶ STUDENT INVESTMENT ACCOUNT (SIA)

The Student Success Act of 2019 marked a historic turning point in funding for Oregon education, with an anticipated additional \$2 billion investment per biennium going to schools. At least fifty percent of these new investments go into the Student Investment Account, which provides non-competitive grant money to all Oregon school districts, eligible charter schools, and starting in 2021-23, YCEPs and JDEPs. **The budget for 2021-23 is \$892,276,973.**

Goals	Program Requirements	Allowable Fund Uses
<p>Meet students' mental health or behavioral needs</p> <p>Reduce academic disparities and increase academic achievement for the following focal groups:</p> <ul style="list-style-type: none"> ▪ Students of color and tribal/Indigenous students ▪ Students who experience disabilities ▪ Emerging bilingual students ▪ Students navigating poverty, homelessness, and foster care ▪ Other student groups that have historically experienced academic disparities 	<p><i>Who is eligible?</i></p> <p>School districts, eligible charter schools*, and YCEPs/JDEPs</p> <p>*Public charter schools who meet the requirements of eligibility within the law or reach agreements to apply as part of their sponsoring district's application. Note, that if a district invites one of their sponsored charter schools to be part of their application, <i>the district must extend the invitation to all charter schools they sponsor</i></p> <p>Virtual charter schools are <i>not</i> eligible for Student Investment Account funding</p>	<p>Increasing instructional time</p> <p>Addressing students' health or safety needs</p> <p>Expanding availability of and student participation in well-rounded learning experiences</p> <p>Reducing class size</p> <p>Ongoing community engagement</p>

EVERY DAY MATTERS (EDM)

Addressing chronic absenteeism through attention to student engagement, school culture, climate and safety, culturally sustaining pedagogy, and family and community involvement is foundational to the success of each initiative in this guidance. Resources and research which support EDM are now embedded across the five other programs, with capacity and support to districts being aligned through ESDs, community-based organizations, and each of the initiatives. You won't see a dedicated one-pager or see EDM as a pulled apart program. This is done intentionally as we align and integrate.



▶ CONTINUOUS IMPROVEMENT PLANNING (CIP)

Schools and districts in Oregon are called upon to engage in continuous improvement work to improve outcomes for students. Continuous Improvement Plans (CIPs) are a requirement of [OAR 581-022-2250](#) and all Oregon districts must submit a CIP to the Oregon Department of Education (ODE) every three years¹⁴.

By studying the best levers for systems change and impact, the continuous improvement process provides a powerful mechanism for promoting shifts in educator behaviors through fostering engagement in collaboration, data analysis, professional learning and reflection—all attributes of high functioning learning organizations. Deep engagement with this process will lead to improved experiences and outcomes for students.

Goals	Program Requirements	Allowable Fund Uses
<p>A continuous improvement process that:</p> <ul style="list-style-type: none"> ▪ Establishes ongoing opportunities to engage education and community partners ▪ Leverages multiple perspectives and equity-centered data analysis to identify strengths and areas for improvement as well as to make timely adjustments to improve experiences and outcomes for students ▪ Uses effective practices to develop and implement a multi-year improvement plan 	<p><i>Who is eligible?</i></p> <p>Each school district is required to submit its local continuous improvement plan to the Department of Education</p> <p>Current OARs don't provide additional detail for how this requirement applies to YCEPs and JDEPs</p>	<p>Continuous improvement planning does not come with direct dedicated resources¹⁵</p>

¹⁴ As of December 2021, ODE is reporting to the legislature and seeking administrative rule changes with the State Board of Education to move this to every four years in order to match the cycles of HSS, CTE, and SIA.

¹⁵ Worth restating, this process does not include federal program processes and procedures to submit budget narratives for each title fund.

► CAREER AND TECHNICAL EDUCATION – PERKINS V (CTE)

Federal funds are given to states for the purpose of improving access and participation in education and training programs that prepare learners for high-wage, high-skill, in-demand careers. This federal funding focuses on strategic investments for improved partnerships and for services to historically underrepresented students. Oregon created a four-year strategic plan to increase career exploration, awareness, preparation, and training. [The Oregon CTE State Plan](#) was adopted by the State Board at their meeting on March 19, 2020. In Oregon, CTE is built around approved CTE Programs of Study which must be developed in partnership with high schools and community colleges, based on business and industry needs, and meet the quality criteria and data reporting requirements outlined in the CTE State Plan. CTE Regional Coordinators are local experts in the criteria for CTE. Approximately \$16M is available through Perkins basic grants annually. **The budget for 2021-23 is roughly \$30 million.**

Goals	Program Requirements	Allowable Fund Uses
<p>To develop more fully the academic knowledge and technical and employability skills of secondary education students and postsecondary education students who elect to enroll in career and technical education programs and Programs of Study.</p> <p>State Plan Goals Include:</p> <ul style="list-style-type: none"> ▪ Expand transparency and the voices contributing to our career preparation system ▪ Increase equitable access and inclusion in high-quality CTE and career connected learning activities ▪ Integrate Career Connected Learning more centrally in Oregon’s schools 	<p><i>Who is eligible?</i></p> <ul style="list-style-type: none"> ▪ Eligible recipients include school districts, community colleges and <u>consortiums</u> ▪ An area career and technical education school, an educational service district, or tribal educational agency ▪ The eligible recipient must have at least one CTE Program of Study approved by the state ▪ Charter schools are eligible to receive the benefits of funding if they have a CTE Program of Study but the eligible recipient is the sponsoring district/consortium ▪ State institutions such as youth corrections and the Oregon School for the Deaf (<u>OSD</u>) 	<p>Develop, coordinate, implement, or improve CTE Programs of Study to meet the needs identified in the comprehensive needs assessment</p> <p>Provide career exploration and career development activities through an organized, systematic framework, particularly linked to expanding access to CTE Programs of Study</p> <p>Provide ongoing sustained professional learning for teachers, faculty, school leaders, administrators, specialized instructional support personnel, career guidance, and academic counselors, or paraprofessionals</p> <p>Provide within career and technical education the skills necessary to pursue careers in high-skill, high-wage, or in-demand industry sectors or occupations</p> <p>Support integration of academic skills into career and technical education programs and Programs of Study</p> <p>Plan and carry out elements that support the implementation of career and technical education programs and Programs of Study and that result in increasing student achievement of the local levels of performance</p> <p>Develop and implement evaluations of the activities carried out with funds</p>

▶ EARLY INDICATOR AND INTERVENTION SYSTEMS (EIS)

An Early Indicator and Intervention System is a coherent network or group of educators within a school (or ideally across levels of a district) who gather, review, and analyze predictive data at a student level. EIS teams identify strengths, assets, and areas to support individual students early in their school careers, as well throughout the grades, and to engage the student and their family in partnership to coordinate systems of care while supporting students towards successful, on-time graduation and transitions into post-high school education and careers. Developing and nurturing a high-quality EIS can be a high leverage move to forward equitable engagement and outcomes for all students. An EIS is essential to the success of other program goals, including HSS 9th Grade on-track¹⁶ and addressing Chronic Absenteeism. **The budget for 2021-23 is \$3,650,500.**

Goals	Program Requirements	Allowable Fund Uses
<p>The EIS Investment aims to support cohesive systems that include these elements:</p> <ul style="list-style-type: none"> ▪ Active staff teams at school and district level ▪ Robust framework of supports and interventions ▪ Program innovation and improvement ▪ Student, family, and community engagement ▪ System for indicator data collection and analysis, use of predictive analytics to identify support for students, and areas for improvement ▪ Integrated elements, connections across grade levels and schools, and alignment with other ODE initiatives, including the Student Investment Account, Continuous Improvement Plan, High School Success, and Every Day Matters 	<p><i>Who is eligible?</i> Districts and charter schools - districts and charter schools may be in consortia. An ESD may lead consortia.</p> <p><i>Eligibility Requirements:</i> None.</p> <p>This is a non-competitive grant program for school districts to implement EIS. Annual funding is allocated at \$3 per Regular ADM to all school districts and charter schools.</p>	<p>Grant-in-aid recipients may use funds for:</p> <ul style="list-style-type: none"> ▪ System software purchases and subscriptions ▪ Staffing to maintain the system and facilitate corrective action ▪ Training for staff to maintain and use the system with fidelity ▪ Data analysis and research ▪ Tribal government consultation ▪ Student, family, staff, and community engagement

¹⁶ See ORS 327.883 (2)(b)(AA). HSS Eligibility Requirement to “provide sufficient time for teachers and staff of students in grade 9 to review data on students’ grades, absences and discipline by school and by course and to develop strategies to ensure at-risk students stay on-track to graduate.”

EXPLAINING CONSORTIA

Applicants have previously engaged, participated, or applied in “consortia” under each program in distinct ways that don’t align easily and functionally have operated differently. Each type of consortium is described and followed by an explanation of what is needed to integrate and align efforts in this regard.

Prior to this guidance, there were three ways consortia may have operated:

1. CTE/Perkins Regional Consortia provided a point of coordination across several districts along with sector and higher education partners. CTE/Perkins consortia submitted the grant application, but Perkins planning was not always integrated into district processes.
2. High School Success Consortia allowed for HSS applicants/recipients to apply and be treated as a singular applicant for the purposes of grant agreement and funding. A HSS Consortia could be a smaller group of districts or charter schools and also be part of a larger CTE/Perkins Regional Consortia.
3. One SIA Consortium existed with seven small applicants/recipients joining as a singular applicant for all aspects of grant agreement and program implementation and reporting. Similarly, YCEPs and JDEPs in some cases joined in consortia to submit a singular SIA application and work together for all subsequent SIA processes including the grant agreement and reporting.

Now, under this guidance, there are two forms of consortia allowed:

1. **CTE/Perkins Regional Consortia** - The majority of districts in the state are required under Perkins law to be a part of a CTE/Perkins Regional Consortium. CTE Regional Coordinators are the key leaders in the state and provide fiscal and programmatic oversight for Perkins funds and CTE programs and Programs of Study. CTE/Perkins Regional Consortia function as partnerships among the districts, community colleges and employers within the region. Perkins funds are to be used for the development of CTE Programs of Study, to enhance and improve existing Programs of Study; and Programs of Study must be based on high-wage, in-demand occupations and built in

BENEFITS OF CTE CONSORTIA

Regional CTE Consortia provide numerous benefits including:

- Resource-pooling to equalize opportunities for students despite district size;
- Promotes collaboration by reinforcing other regional structures and facilitating strong effective partnerships with colleges, business and industry, and STEM hubs;
- Provides a forum for teacher-led professional development and investments into in-depth topics for improving CTE instruction;
- Creates solidarity of advocacy for improving CTE for all students in the region, not just one or two;
- Federal accountability for Perkins performance targets is held at the consortia level;
- Allows for a combined effort in the recruitment, licensing and retention of expert CTE teachers;
- Reinforces collaboration and leadership to support the development and implementation of high-quality CTE Programs of Study.

partnership with a community college. **The CTE/ Perkins Regional Consortia will continue.** The role of CTE/Perkins Regional Consortia in applicant planning is more fully addressed in Section 2 of this guidance, “Effective Planning.” CTE/Perkins Consortia leads will submit a Perkins Basic Grant application informed by the work represented in this integrated guidance and applicants will plan using regional CTE priorities. CTE/Perkins Regional Consortia don’t join together as applicants under this guidance, but instead are a significant partner for planning and reporting.

2. **Aligned Program Consortia** - The five other programs under this guidance (in addition to CTE-Perkins) will allow for a combination of applicants to apply for funding as a consortium, meaning as a single joint applicant. An “Aligned Program Consortia” is defined as two or more eligible grant recipients (districts, charter schools, Oregon School for the Deaf, and/or YCEPs/JDEPs) that apply for joint funding and implement through a joint grant agreement the programs covered in this guidance. When this kind of consortium is formed, each party is agreeing to operate in full alignment with shared fiscal responsibility, coordinated engagement, a singular application, budget, etc., that are all completed together. One entity is named as the lead to assist in financial and programmatic monitoring and reporting.

Please note:

If you are opting to work in an Aligned Program Consortium, it needs to be for all of the initiatives that fall within the integrated guidance¹⁷. For example, if you previously worked within a consortium for HSS that was different from your consortium for SIA, those will now need to be one and the same for the 23-25 biennium.

You can participate in both a CTE/Perkins Regional Consortium and an Aligned Program Consortium.

You cannot participate in more than one Aligned Program Consortia or CTE Regional Consortia.

ADDITIONAL DETAIL ON ALIGNED PROGRAM CONSORTIA

A single joint application from an Aligned Program Consortia must still be approved by each partnering school district’s or applicant’s governing board and meet all other application requirements. A consortium will receive one grant agreement per funding initiative but report on program implementation as one grantee. Your Annual Report will also need to be presented at each partnering school district’s governing board as outlined in Section 6.

As an additional piece to your application, a Memorandum of Understanding (MOU) will be developed and signed by all members of the consortium to outline the Outcomes, Strategies and Activities of the group; to designate a lead and fiscal agency; and to define consortium operations and the reporting structure. The signed MOU will need to be submitted to ODE prior to a grant agreement being executed and funds being released to the grantee in EGMS.

If an Aligned Program Consortia will reach a total number higher than 100 ADMw or bring together applicants across more than one ESD service area, a request to apply in consortia must be received and approved by ODE’s Office of Education Innovation and Improvement 30 days prior to the application submission in March 2023.

CONSORTIA DESIGNS CAN LINK AND STRENGTHEN RURAL AND SMALL SCHOOLS

ODE highly encourages smaller districts located in the same region to consider working in consortia directly or through their ESD region. Interested districts who need support can contact ODE.EII@ode.oregon.gov.

17 HSS, SIA, CIP, EDM, and EIIIS

TARGETED UNIVERSALISM AND SNAPSHOTS OF FOCAL STUDENT GROUPS



OREGON
DEPARTMENT OF
EDUCATION

TARGETED UNIVERSALISM AND SNAPSHOTS OF FOCAL STUDENT GROUPS

BRIDGING REALITIES

Snapshots of focal student groups and this introduction of targeted universalism are provided by ODE in the context of this guidance with the very real recognition of the degree of fracturing that is felt, and felt differently, by students, families, and communities across Oregon and nine sovereign nations at this time.

Targeted universalism works from an essential understanding that sameness is not fairness while finding common cause in shared success and universal prosperity. The initiatives operationalized in this guidance have their best opportunity for success when we share an understanding that every student benefits and every community wins when every student belongs and every student finds well-being and academic success.

APPLYING TARGETED UNIVERSALISM

Professor John A. Powell is credited with naming and cultivating the development of practices and policies referred to as “targeted universalism.” Targeted universalism means setting universal aims that are pursued by universal and targeted processes to achieve those aims.

For example, the outcomes and strategies set forward in this guidance, along with the complexities of setting Longitudinal Performance Growth Targets, can and should be developed to be inclusive of each and every student. And to reach those outcomes, Oregon policies offer focused processes to identify, engage, and design targeted approaches for each group in service of universal aims.

Applying Targeted Universalism provides an operational pathway to lead for educational change in a way that bridges relationships and perspectives while maintaining a dedicated and precise attention on focal students and their families.



WHY TARGETED UNIVERSALISM?

“Many policy disagreements are framed by familiar debates about the role of government and the nature or extent of the problem, as well as pragmatic concerns about how to structure or formulate policy for sustainable impact. More than differences of ideology or disagreement over facts, however, underlie these divides. Political polarization is fueled by a growing feeling of unfairness and the perception that policy is a zero-sum game. If one group benefits, or benefits disproportionately, then other groups may feel left behind or overlooked. The insistence that government and other public institutions remain neutral is eroded by a sense that the government is taking sides or has taken the wrong side. In an era of political polarization and fiscal austerity, policy debates too readily become trapped in a binary of either universal responses or targeted solutions. Universal responses enjoy a degree of legitimacy in a diverse and pluralistic society, but they may also be viewed as unaffordable and overly ambitious, while also inadequate at helping those most in need. Therefore, the most marginalized people are often the most skeptical of ostensibly universal policies. Targeted policies may be more efficient and less costly, but by targeting a particular group, these approaches are often viewed as unfairly helping one group over another, seeding hostility and resentment.

There is a hunger for fresh approaches and urgent demand for novel policy methods that can break through our political gridlock, address the problems of our time and create new avenues for thriving individuals and communities. Targeted universalism is an approach that supports the needs of the particular while reminding us that we are all part of the same social fabric.

- [Targeted Universalism Primer](#), May 2019¹⁸

What does applying targeted universalism look like in practice?

Step in Targeted Universalism	Example In State Practice	Example In District/Community/School
1) Establish universal goal based on shared aspiration or recognition of a problem	Improve high school graduates' readiness for college and career	Improve high school graduates' readiness for college and career
2) Assess general population performance relative to the universal goal	State-level reporting on 9th-grade on-track, 4-year graduation, 5-year completion, data on how Oregon students engage in college, career, and workforce opportunities	District, school, or regional data on 9th-grade on-track, 4-year graduation, 5-year completion, data on students engage in college, career, and workforce opportunities in region + general school climate or other assessment data
3) Identify groups and places that are performing different with respect to the goal and disaggregate them	Review disaggregated state-level data and any qualitative or quantitative research	Review unsuppressed ¹⁹ disaggregated school, district, and "street-level" data alongside information from students, community, and educators
4) Assess and understand the structures that support or impede each group or community from achieving the universal goal	The work of the bi-partisan joint committee on Student Success in 2018-2019	Regular meetings of educators and administrators at the school level, district level reviews, work with ESDs
5) Develop and implement targeted strategies for each group to reach the universal goal	The programs and policies put forward in this integrated guidance	The school or district level processes and plans developed in use of this guidance

18 powell, john, Stephen Menendian and Wendy Ake, "Targeted universalism: Policy & Practice." Haas Institute for a Fair and Inclusive Society, University of California, Berkeley, 2019. haasinstitute.berkeley.edu/targeteduniversalism.

19 Districts have access to secure information about smaller student groups that is not published at state-level.

UNIVERSAL TRENDS

The data and trends presented for all students illuminate increases, decreases, and missing information for each of the metrics. Missing information is the result of COVID-19 disruptions on educational systems. This information sets a humbling foundation to support realistic understanding of these statewide performance measures, also referred to in this guidance as “common metrics.” The [2020-21 Statewide Report Card](#) has additional information.

All Students	2016-17	2017-18	2018-19	2019-20	2020-21	Year-to-Year trend ²⁰
Regular Attenders ²¹	80.3	79.5	79.6	na	71.9	-0.4
3rd Grade Reading (ELA)	45.2	47.0	46.5	na	42.5 ²²	0.6
9th Grade On-Track	83.4	84.5	85.3	na	73.6	0.9
4-year Graduation	76.7	78.7	80.0	82.6	80.6	1.0
5-year Completion	83.2	84.6	86.3	87.2	87.8	1.2

SNAPSHOTS OF FOCAL STUDENT GROUPS

Engagement of focal student groups presents a unique opportunity and vital resource for collecting high impact community data to inform the practices that impact those same populations. Focal student groups, and their families, must be engaged in planning under this guidance and there must be demonstrated evidence and artifacts for how engagement strategies/activities impacted your chosen outcomes, priorities, strategies, and activities.

Focal student groups are defined within the [Student Success Act](#) as “students of color; students with disabilities; emerging bilingual students; and students navigating poverty, homelessness, and foster care; and other students who have historically experienced disparities in our schools.”²³

Throughout the Integrated Guidance, “focal students” will be used to replace the Federal Perkins V (CTE) term, “special populations.”

Snapshots of each focal student group are presented to bring depth, humanity, and some reality to whom these laws and programs are designed. These snapshots will be inadequate as there is not a sufficient way to capture the beauty, resilience, and strength within each group. The information provided is offered as an effort to give some voice and visualization to the experiences these initiatives are aimed at meeting.

²⁰ Average change in year-to-year measures of this indicator. Includes only 2016-17 through 2018-19 data for indicators where 2019-20 data is not available.

²¹ Regular Attenders rates vary significantly by grade level.

²² Low participation rate; may not be representative.

²³ ODE is currently in the rule-making process to add additional focal student groups that would be required to be engaged as part of the plan development process which could include migrant students; recent arrivers; incarcerated and detained youth; and LGBTQ2SIA+ students . The rules are anticipated to be adopted by the State Board of Education in April 2022.

FOCAL STUDENT GROUPS²⁴

Language and terminology are vital tools to understanding and addressing issues of inequity. Frequently, language creates unhealthy narratives of current and historically marginalized students (for example, the term “underrepresented” can be used in a way that subtly suggests that students choose not to represent themselves, instead of shedding light on systematic barriers in schools despite attempts to participate). The decision to use “focal student groups” was an intentional choice based on the historic decentering of underserved students and families, and the decision in the Student Success Act in 2018 to center and make these students the primary focus.

MARKING DIFFERENTIATION BETWEEN FOCAL STUDENT GROUP ENGAGEMENT & PREPARATION OF LONGITUDINAL PERFORMANCE GROWTH TARGETS

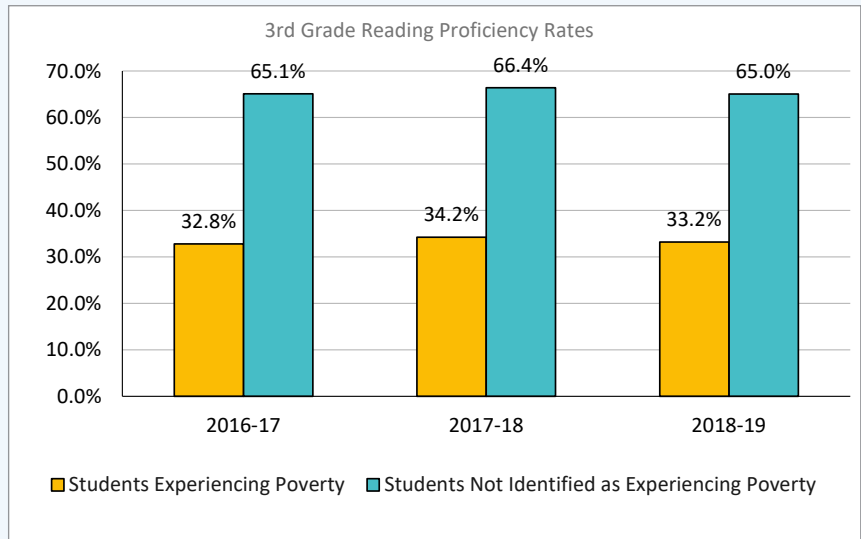
ODE recognizes that the “common metrics” used for setting Longitudinal Performance Growth Targets (LPGTs) are not captured, at this time, for several focal student groups. Applicants are only required to put forward LPGTs as set-out by the department for focal groups where data collections currently exist. Changes in rules and this guidance offer all applicants the ability and expectation to distinguish between who can be engaged in planning and the current constraints in data collection. For the purposes of engagement and planning, please use the most robust articulation of focal student groups (and their families) as provided here.

STUDENTS EXPERIENCING POVERTY

State law and rule currently define students experiencing poverty as students experiencing economic disadvantage using USDA income eligibility guidelines charting free and reduced lunch. What we know is that many of Oregon’s students are experiencing one or more generations of chronic poverty and the impacts that come from food instability, multiple transitions between school programs, navigating what can be socially isolating, and mental health impacts overtime. We also know, from state and national research, that young people and their families experiencing poverty also possess many assets and strengths and no limitations on what they can academically achieve if the right conditions are created for engagement and stability. There are students experiencing significant poverty in every racial and ethnic group in Oregon. Students experiencing poverty who are in additional focal student groups experiencing disparities often face compounding challenges.

²⁴ In Perkins V, a federal program, focal student groups are referred to as special populations and include individuals with disabilities; individuals from economically disadvantaged families, including low-income youth and adults; individuals preparing for non-traditional fields; single parents, including single pregnant women; out-of-workforce individuals; English learners; homeless individuals described in section 725 of the McKinney-Vento Homeless Assistance Act (42 U.S.C. 11434a); youth who are in, or have aged out of, the foster care system; and youth with a parent who is a member of the armed forces and is on active duty.

Students Experiencing Poverty	2016-17	2017-18	2018-19	2019-20 ²⁵	2020-21
Regular Attenders	75.6	75.0	74.7	na	71.7 ²⁶
3rd Grade Reading (ELA)	33.2	34.4	33.6	na	42.4 ²⁷
9th Grade On-Track	75.8	77.1	77.4	na	66.6
4-year Graduation	70.1	72.4	74.4	77.6	77.0
5-year Completion	78.5	80.0	82.1	83.6	83.8



STUDENTS OF COLOR

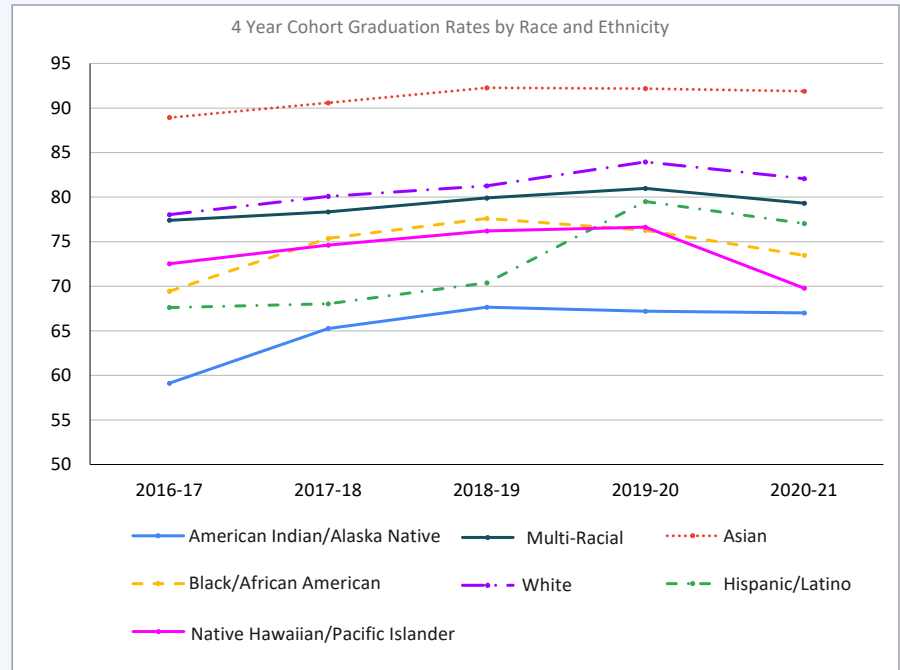


Students of color represent more than 40% of the total student population in Oregon’s K-12 education system - a system that is responsible for seeing assets and possibilities while confronting where it has fallen short in creating welcoming, nourishing, and accountable learning environments.

Laws and rules under this guidance describe students of color as including but not limited to American Indian and Alaska Native students, Black and African American students, Hispanic and Latino students, Asian students, Native Hawaiian and Pacific Islander students, multiracial students, and any other racial or ethnic group identified by the school district as having historically experienced academic disparities.

- 25 2019-20 data collections were impacted by the state of emergency resulting from the COVID-19 pandemic. Regular attenders, 9th Grade On-Track, and Assessment data are not available for this year.
- 26 As a result of the substantive changes to attendance reporting guidance from previous years, Regular Attendance rates from the 2020-21 school year are not directly comparable to rates published for prior school years, and should not be used for comparative or accountability purposes. See <https://www.oregon.gov/ode/schools-and-districts/reportcards/reportcards/Pages/Regular-Attenders-2021.aspx> for more information.
- 27 Low participation rate; may not be representative.

Racial identity and the term "students of color" are both imperfect ways of describing complex, multifaceted, and diverse experiences. Some students may more closely identify with some terms/identities over others. What is important is to listen to how they wish to be acknowledged while being clear about the data, trends, and patterns we have about different racial and ethnic groups. The term is intended to be used intentionally and inclusive while honoring many different lived experiences and realities. The data presented is disaggregated within the constraints of data currently available at the state-level.



Asian Students	2016-17	2017-18	2018-19	2019-20	2020-21
Regular Attenders	92.2	91.6	91.0	na	88.9 ²⁸
3rd Grade Reading (ELA)	63.9	64.2	63.8	na	69.1 ²⁹
9th Grade On-Track	>95	>95	>95	na	89.1
4-year Graduation	88.9	90.6	92.3	92.2	91.9
5-year Completion	92.7	92.7	94.0	95.7	95.4

Black/African American Students	2016-17	2017-18	2018-19	2019-20	2020-21
Regular Attenders	76.5	74.8	73.4	na	59.5 ³⁰
3rd Grade Reading (ELA)	24.7 ³¹	25.2 ³²	26.3	na	36.1 ³³
9th Grade On-Track	75.7	79.0	79.0	na	68.6
4-year Graduation	67.6	68.0	70.4	76.3	73.5

28 Not comparable to prior years; see previous footnotes for details.
 29 Low participation rate; may not be representative.
 30 Not comparable to prior years; see previous footnotes for details.
 31 Based on less than 95% participation; may not be representative.
 32 Based on less than 95% participation; may not be representative.
 33 Low participation rate; may not be representative.

Black/African American Students	2016-17	2017-18	2018-19	2019-20	2020-21
5-year Completion	77.4	75.8	77.7	80.5	81.6

American Indian/ Alaska Native Students	2016-17	2017-18	2018-19	2019-20	2020-21
Regular Attenders	69.4	70.4	69.4	na	55.1 ³⁴
3rd Grade Reading (ELA)	25.2	32.0	29.9	na	21.6 ³⁵
9th Grade On-Track	70.5	76.0	74.4	na	57.6
4-year Graduation	59.1	65.3	67.7	67.2	67.0
5-year Completion	66.7	70.0	76.5	78.9	77.0

Native Hawaiian/ Pacific Islander Students	2016-17	2017-18	2018-19	2019-20	2020-21
Regular Attenders	69.8	69.2	68.7	na	52.4 ³⁶
3rd Grade Reading (ELA)	23.7	27.2	26.6	na	27.9 ³⁷
9th Grade On-Track	76.1	77.8	79.3	na	57.4
4-year Graduation	69.4	75.4	77.6	76.6	69.8
5-year Completion	76.9	74.3	82.6	83.7	81.0

Hispanic/Latino/a/x Students	2016-17	2017-18	2018-19	2019-20	2020-21
Regular Attenders	77.5	76.6	76.2	na	63.2 ³⁸
3rd Grade Reading (ELA)	25.9	28.0	28.1	na	24.3 ³⁹
9th Grade On-Track	77.3	78.9	80.4	na	65.1
4-year Graduation	72.5	74.6	76.2	79.5	77.0
5-year Completion	78.9	80.8	82.6	83.7	84.5

34 Not comparable to prior years; see previous footnotes for details.

35 Low participation rate; may not be representative.

36 Not comparable to prior years; see previous footnotes for details.

37 Low participation rate; may not be representative.

38 Not comparable to prior years; see previous footnotes for details.

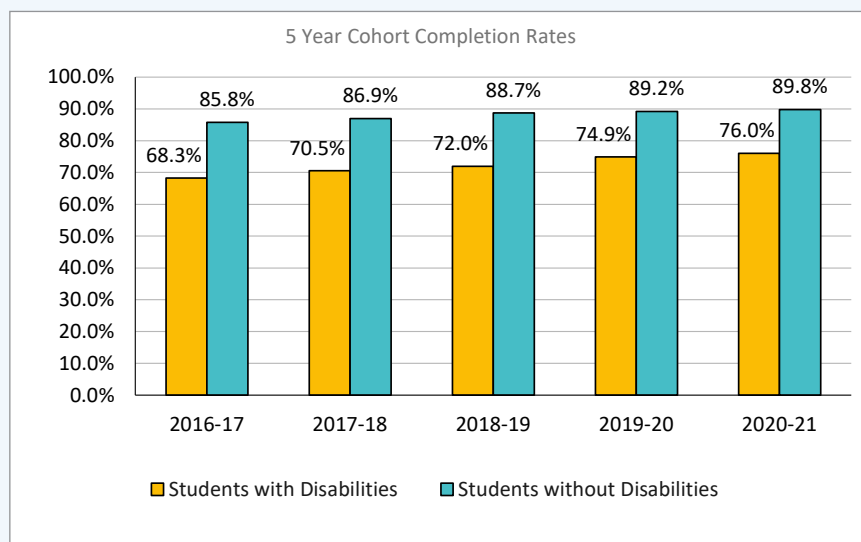
39 Low participation rate; may not be representative.

Multiracial Students	2016-17	2017-18	2018-19	2019-20	2020-21
Regular Attenders	79.6	78.5	78.6	na	72.5 ⁴⁰
3rd Grade Reading (ELA)	51.7	51.9	50.7	na	46.3 ⁴¹
9th Grade On-Track	83.7	83.5	84.5	na	76.0
4-year Graduation	77.4	78.4	79.9	81.0	79.3
5-year Completion	82.7	86.2	86.8	87.5	86.8

STUDENTS WITH DISABILITIES

Formally defined within both state and federal law, students experiencing disability are learners who have a legally-protected right to accommodations and/or special education services.

Students with Disabilities (IEP)	2016-17	2017-18	2018-19	2019-20	2020-21
Regular Attenders	73.4	72.8	72.5	na	63.0 ⁴²
3rd Grade Reading (ELA) ⁴³	18.7	21.1	21.7	na	19.8
9th Grade On-Track	69.5	71.4	71.7	na	60.8
4-year Graduation	58.8	60.6	63.4	68.0	66.1
5-year Completion	68.3	70.5	72.0	74.9	76.0



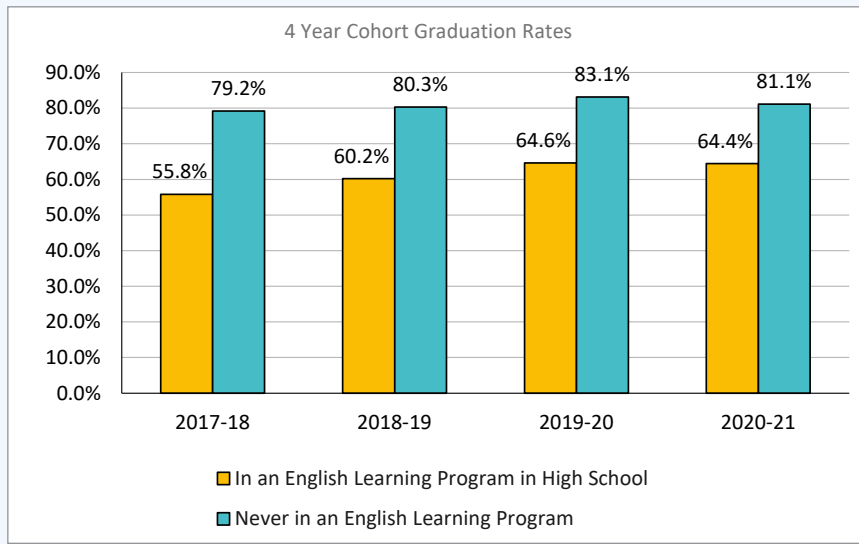
⁴⁰ Not comparable to prior years; see previous footnotes for details.

⁴¹ Low participation rate; may not be representative.

⁴² Not comparable to prior years; see previous footnotes for details.

⁴³ Based on less than 95% participation in all years; may not be representative.

STUDENTS WHO ARE EMERGING BILINGUALS



Students who are continuing to develop their home language (first language) while also learning an additional language are emerging bilingual students. Dual or multi-lingual learning is a powerful asset to be cultivated. Students' learning develops at different rates and language fluency when learning more than one language can arrive at time intervals that don't follow with conventional scaling. For example, a premium might be placed on 3rd grade reading where developed fluency for emerging bilinguals might show much more prominently in 4th grade language proficiency assessments. Beyond just language, emerging bilingual students have cultural assets and worldviews that should be listened to, understood, and supported in building a positive school culture and climate.

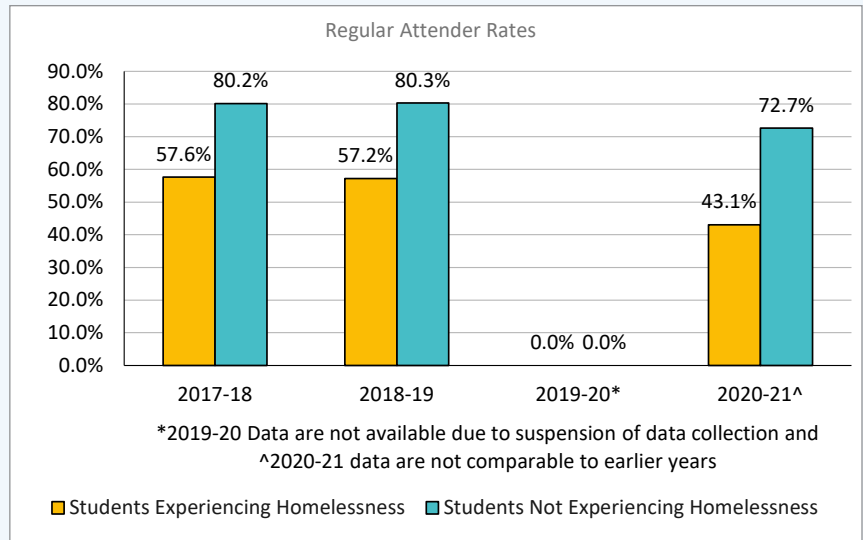
Emerging Bilingual Students	2016-17	2017-18	2018-19	2019-20	2020-21
Regular Attenders	80.9	79.7	78.4	na	63.0 ⁴⁴
3rd Grade Reading (ELA)	14.5	9.0	7.9	na	6.1 ⁴⁵
9th Grade On-Track	65.7	69.6	70.8	na	54.3
4-year Graduation	54.9	55.8	60.2	64.6	64.4
5-year Completion	65.7	67.1	67.8	70.5	71.8

⁴⁴ Not comparable to prior years; see previous footnotes for details.

⁴⁵ Low participation rate; may not be representative.

STUDENTS EXPERIENCING HOMELESSNESS

Students experiencing homelessness are students who lack a fixed, regular, or adequate night time residence. Formally defined by the description within [The McKinney-Vento Homeless Assistance Act](#), students may be living in parks, motels, cars, shelters, or other settings not designed or ordinarily used for regular sleeping accommodations for human beings.



Students Experiencing Homelessness	2016-17	2017-18	2018-19	2019-20	2020-21
Regular Attenders	59.2	57.6	57.2	na	43.1 ⁴⁶
3rd Grade Reading (ELA)	na	na	23.8	na	20.6 ⁴⁷
9th Grade On-Track	56.2	60.2	60.5	na	46.5
4-year Graduation	50.7	54.1	55.4	60.5	55.4
5-year Completion	63.1	64.2	68.4	68.8	69.7

STUDENTS EXPERIENCING FOSTER CARE

Foster care is a temporary or permanent living situation for children whose parents or family cannot take care of them and whose need for care has come to the attention of child welfare agency staff. While in foster care, children may live with relatives, with foster families or in group facilities. Over half of children who enter foster care return to their families. Formally, students experiencing foster care are identified by ORS 30.297.

Statewide data is not yet available for this focal group.



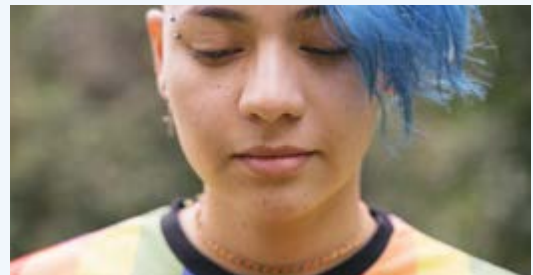
⁴⁶ Not comparable to prior years; see previous footnotes for details.

⁴⁷ Low participation rate; may not be representative.

LGBTQ2SIA+ STUDENTS

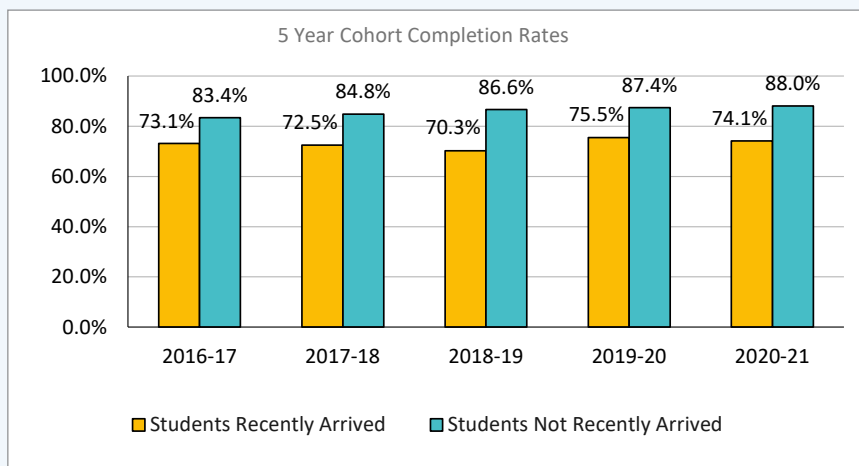
Pending State Board of Education action and for the purposes of engagement, this focal group would include but not be limited to lesbian, gay, bisexual, transgender, non-binary, queer, questioning, 2 two-spirit, intersex, asexual, and “+” recognizes that there are myriad ways to describe gender identities & sexual orientations.

Statewide data is not yet available for this focal group.



STUDENTS RECENTLY ARRIVED

These are students who were born outside the US and US territories (including military bases) - anyone without a US birth certificate who has had less than three cumulative years of education in the US. Foreign exchange students are excluded from the calculation where possible.



Students Recently Arrived	2016-17	2017-18	2018-19	2019-20	2020-21 ⁴⁸
Regular Attenders	84.2	83.3	83.4	na	71.6 ⁴⁹
3rd Grade Reading (ELA) ⁵⁰	36.4	36.0	37.5	na	45.0
9th Grade On-Track	79.0	84.3	89.3	na	72.2
4-year Graduation	58.0	59.0	64.6	66.9	65.8
5-year Completion	73.1	72.5	70.3	75.5	74.1

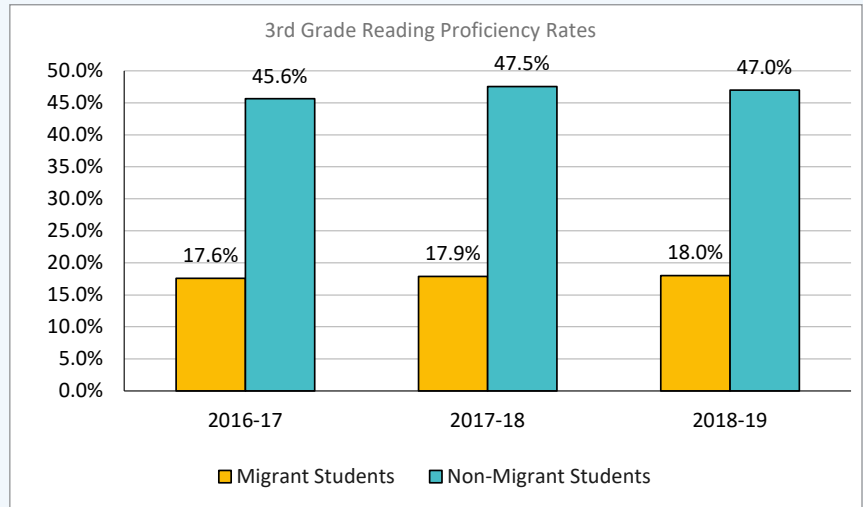
⁴⁸ This group was impacted by travel restrictions due to the COVID-19 pandemic in 2020-21, and is smaller than usual for this year. Data may not be comparable to prior years.

⁴⁹ Not comparable to prior years; see previous footnotes for details.

⁵⁰ Based on less than 95% participation in all years; may not be representative.

MIGRANT STUDENTS

This focal group consists of students who moved to Oregon or between districts in Oregon within the last 36-months in order for their family or themselves to pursue work as migratory agricultural workers or fishers. More helpful information and further illustration of the experiences of these students is available in this [US federal program manual](#).



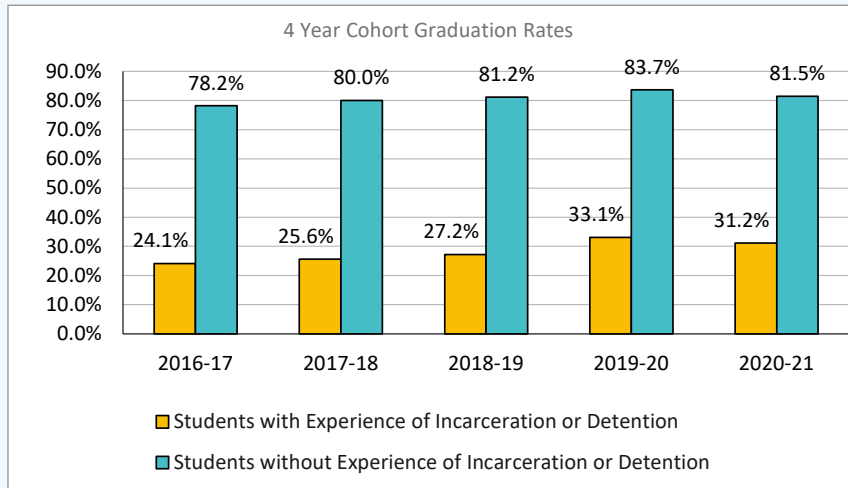
Migrant Students	2016-17	2017-18	2018-19	2019-20	2020-21
Regular Attenders	na	80.5	81.0	na	64.2 ⁵¹
3rd Grade Reading (ELA)	17.6	17.9	18.0	na	14.4 ⁵²
9th Grade On-Track	76.1	78.3	81.3	na	64.1
4-year Graduation	71.0	75.0	79.4	79.9	78.3
5-year Completion	77.6	78.2	81.9	86.4	84.3

⁵¹ Not comparable to prior years; see previous footnotes for details.

⁵² Low participation rate; may not be representative.

STUDENTS WITH EXPERIENCE OF INCARCERATION OR DETENTION

Schools have a powerful opportunity to receive, welcome, and engage students who have experience with incarceration or detention. The data below reflects information from students currently incarcerated or detained as well as students who were previously incarcerated or detained.



Students with Experience of Incarceration or Detention ⁵³	2016-17	2017-18	2018-19	2019-20	2020-21
Regular Attenders	52.6	50.5	52.3	na	37.0 ⁵⁴
3rd Grade Reading (ELA) ⁵⁵	na	na	na	na	na
9th Grade On-Track	33.7	39.2	30.0	na	29.4
4-year Graduation	24.1	25.6	27.2	33.1	31.2
5-year Completion	46.3	48.1	52.4	54.3	55.7

Important and additional detail on evaluation of performance under this guidance and further technical support, including how to set gap closing targets and develop local optional metrics are provided in [Section 6](#) and [Appendix I](#).

THERE IS ALWAYS MORE TO THE STORY

The limited snapshots provided here won't do justice to the lived experiences of Oregon's students and families. The knowledge, wisdom, needs, and strengths of each member of the learning community is needed to help vision and develop the plans and investments called for in this Integrated Guidance. This information is provided as one input, among many, to help bring to life what is possible when we work together.

⁵³ Students with enrollment in a YCEP or JDEP within the current or any prior school year.

⁵⁴ Not comparable to prior years; see previous footnotes for details.

⁵⁵ No formerly incarcerated students took the 3rd grade reading assessment due to the higher age group of these students.

SECTION 2: EFFECTIVE PLANNING



OREGON
DEPARTMENT OF
EDUCATION

SECTION 2: EFFECTIVE PLANNING

Section Snapshot

This section outlines the preparation needed, the specific process requirements, and the tasks that applicants will engage in to inform development and prepare for the integrated plan submission in **March 2023**. Information in this section offers explanations of planning requirements inclusive of any needed documentation or artifacts for the final application as well as outlines applying in consortia, with additional resources and tools linked in or included in the appendices.

PREPARATION

Planning well and planning in advance are keys to ensuring you are ready to submit your integrated application in **March 2023**. Assembling a multidisciplinary team (or teams) with members that can support various aspects of your preparation is one approach to ensuring you stay on-track before the plan submission window opens. For applicants applying in consortia, or other combinations of relationships between recipients, team membership should be representative of the multiple perspectives involved. Varied tasks such as preparing disaggregated data reports for team analysis, planning and scheduling community engagement processes, scheduling meetings and keeping track of notes are examples that can be delegated to members of your team(s). Consider the availability of people and resources, including regional ESD Liaisons, CTE Regional Coordinators, tribal and community partners, higher education, and teacher leaders. Other partners are better engaged at a regional level. Work with regional ESD Liaisons and CTE Regional Coordinators to engage higher education, business and industry, and workforce partners.

CHECK PROGRAM REQUIREMENTS

All school districts are eligible and can move forward with planning around how the goals of all six programs move forward in your comprehensive planning. The Oregon School for the Deaf, some charter schools, YCEPs, and JDEPs are not eligible for all programs within this guidance. Please review this guidance and check [Appendix H](#) for details before you get too far down the road in planning and budgeting.

Questions on eligibility?

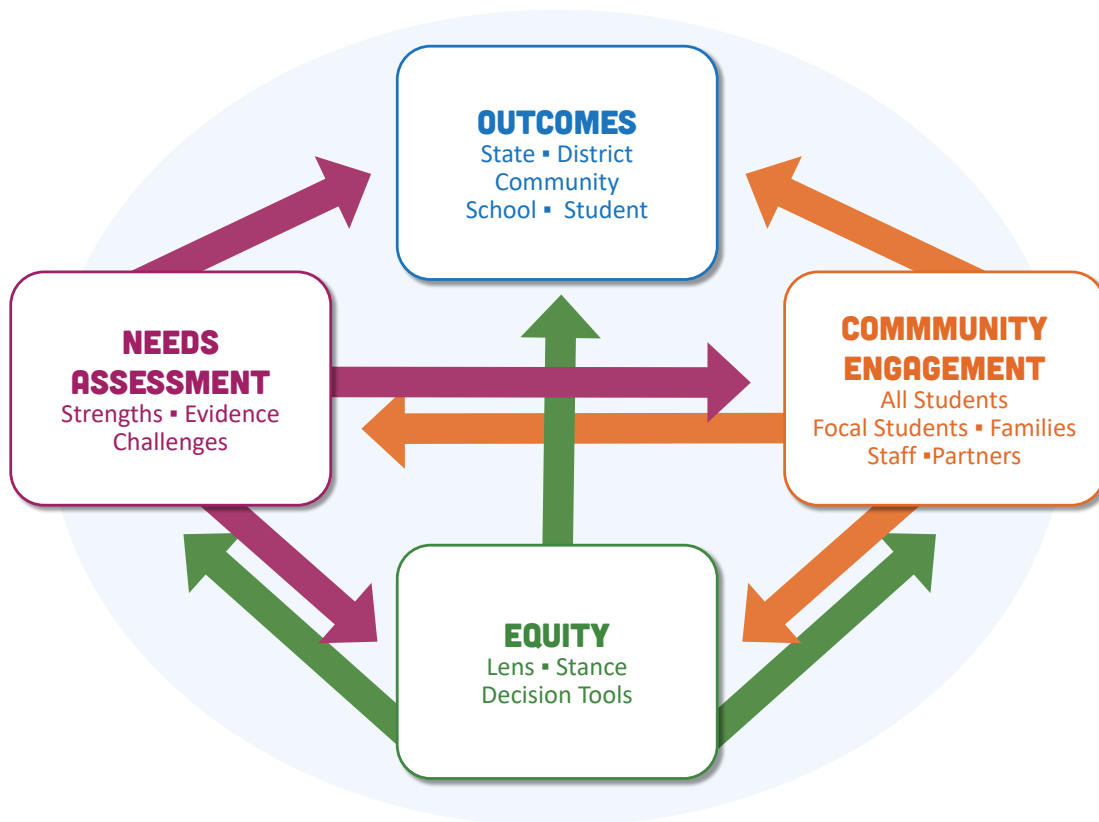
Contact ODE.EI1@ode.oregon.gov



PROCESS

While this guidance aims to lay out information as clearly and succinctly as possible, the reality of good implementation, planning, and engagement is that it is a circular and sometimes circuitous path where key process commitments are interrelated. ODE is focused on improvement-driven processes while adhering to the statutes and rules that govern each initiative. Tangibly, this means a strengths-based, trauma- and SEL-informed equity lens is being applied at every turn. It means community engagement processes aren't "one and done" but build on each other and re-visit prior conversations and commitments. Being improvement-driven means new learnings from district and community data reviews and engaging in continuous improvement and comprehensive needs assessment processes that include community engagement, data analysis, and the application of an equity lens. These lead to changes in program and financial planning which then contribute to positive outcomes.

The visual below illustrates the need for each piece to actively work with each other. The comprehensive needs assessment should be informed and collaborated on with communities, as well as inform how communities are being engaged more broadly. An equity lens should be consulted and utilized throughout the planning process as well. As communities are being engaged, the equity lens should be used to ensure that core equity needs, values, and considerations are being met. Broader community engagement (that isn't specifically tied to the comprehensive needs assessment) can also inform the planning process and work.



PLANNING REQUIREMENTS

It is a notable project management task to skillfully move through each planning requirement in this integrated guidance. Administrative costs are allowed and useful to support actualizing these steps along with dedicated ESD supports described later in this document. Each of the planning steps listed here are then described in more detail:

- Use of an Equity Lens
- Community Engagement
- Tribal Consultation
- Comprehensive Needs Assessment
 - Consider Community Engagement Input
 - Review Disaggregated Student Data
 - Identify Priorities Aligned to the [Four Common Goals](#)
- Consideration of the Quality Education Model (QEM)
- Reviewing and Using Regional CTE Consortia Inputs
- Further Examination of Potential Impact on Focal Students tied to Planning Decisions
- Development of a four-year plan with clear Outcomes, Strategies and Activities

ONGOING USE OF AN EQUITY LENS

The adoption and use of an equity lens or equity decision tool is required throughout the planning, engagement, and implementation of your integrated plan. An equity lens is a tool that helps center core values, commitments, and questions. ODE encourages the use of a strengths-based, trauma-and-SEL informed equity lens as it helps create a systematic structure to ensure no focal group or community is missed in the process of community engagement and plan development. Since the equity lens should be used throughout the application and planning processes, we have included Equity Lens 101 Call-out Boxes to support a deepened understanding of how to integrate this requirement throughout.

EQUITY LENS 101: WHAT IS AN EQUITY LENS?

An equity lens is an active tool that supports core values, commitments, orientations, and questions to become standard practice. An equity lens requires a clearly articulated equity stance that can be made actionable when making key choices and decisions.

For example: One part of our equity stance may be tied to honoring intersectional identities in our district, such as student focal groups who navigate multiple intersecting forms of oppression like poverty, race, and gender. Translating this principle in my district's equity stance into an active equity lens could look like:

- The equity lens ensures that knowledge and engagement is occurring with those most affected by these issues, including naming specific groups
- The equity lens ensures that decision-makers also reflect a similar demographic or intersectional make-up to those affected.
- The equity lens includes questions that ask how intersectional dynamics are addressed; including consideration for unintended consequences that could arise from not addressing intersectional dynamics⁵⁶.
- An equity lens must support navigating choices in the here and now that impact students today. It helps translate theory into practice, and avoid making decisions that could marginalize or harm students, staff, families, and communities.

⁵⁶ For more on intersectionality, see SWIFT Education Center's ["Understanding intersectionality is critical for advancing educational equity for all"](#)

WHAT EQUITY LENS SHOULD YOU USE?

Applicants can choose which equity lens to adopt and use through the integrated plan:

1. **The Oregon Equity Lens:** This lens is widely used and adopted, and offers key questions that could support your planning. If using this lens, applicants are encouraged to expand on the Oregon Equity Lens to adapt to specific community populations, histories, dynamics, and needs.
2. **Applicant’s Customized Equity Lens:** Many districts, ESDs, and other organizations have developed their own equity lens that can meet the particular process, outcome, and demographic needs of their contexts. ODE supports applicants to develop and/or use their own equity lens and has developed tools/resources to support robust and rigorous equity lenses:
 - a. **Equity Lens and Tools** (Appendix E): This reference includes key resources about equity lens development and use, as well as EII’s core recommendations for what considerations an applicant’s equity lens should cover. If you are using your own equity lens, this is a highly recommended resource to consult.
 - b. ODE’s **Decision Tools:** While developed to support rapid decision-making to respond to COVID-19, these tools offer a concrete decision making framework and include:
 - i. **Decision Tree:** A sequence of intentional questions for leaders that could lead to decision-making that deepens relationships and trust and avoids unintended impacts or harm to communities.
 - ii. **Deepening Questions:** A collection of questions aimed at deepening leaders’ reflections to help get underneath core decision-making challenges.

- iii. **Consultancy Protocol:** A facilitative method designed to support leaders in better understanding dilemmas, while also uncovering new or different approaches to decision-making.

ODE also encourages recipients to share their equity lens broadly with their community, so they are aware of how that tool will be used in the district or eligible charter school’s decision-making process.

COMMUNITY ENGAGEMENT

Authentic and consistent community engagement is vital. During the 2019-20 school year, SIA applicants across Oregon engaged their communities in a variety of ways to inform their strategic planning efforts. Since then, COVID-19, Oregon wildfires, school staffing shortages and unmatched educator burnout, and intense incidents and patterns of racial injustice have led to multiple unprecedented school years with students, families, communities, and school and district leaders navigating significant challenges. In the alignment of initiatives under this guidance, the robustness of SIA community engagement is now extended and expected to inform all six initiatives.

Research shows that students learn better when their families and local community organizations are engaged in schools. Strong family engagement is linked to increased student achievement, reduced absenteeism, and higher graduation rates. In addition, community engagement can help ensure that students’ social, emotional, and physical health needs are addressed, while also providing meaningful, real-world learning opportunities. Schools that engage with their communities are also better able to help students solve local problems, contribute to civic life, and respond to a changing economy.”⁵⁷

57 <https://www.greatschoolspartnership.org/resources/equitable-community-engagement/the-case-for-community-engagement/>

HONORING SOVEREIGNTY, TRIBAL ENGAGEMENT AND TRIBAL CONSULTATION

There are also important requirements for honoring the sovereignty of Native American and tribal students, families, communities, and Nations in Oregon. While all Native American and/or tribal students must be engaged as focal student groups, in some cases, applicants are required to engage in formal Tribal consultation processes as outlined in the [ODE Tribal Consultation Toolkit](#).

UNDERSTANDING THE COMMUNITY ENGAGEMENT SPECTRUM

This [Community Engagement Toolkit](#) lays out a framework and recommendations for applicants to engage in robust community engagement with focal student groups, families, communities, and staff. Applicants are encouraged to build on existing work and to grow with community, youth, or staff advisories developed previously.

This framework serves as a tool to assess and deepen engagement in Oregon communities and is adapted from the work of [Facilitating Power](#) and the [Movement Strategy Center](#). It is organized on a spectrum of shallow to robust community engagement (Levels 1-5). District and school leaders are encouraged to use this framework to reflect on their stance and approach towards communities. It may be used to assess the overall level of engagement of a district/school, as well as be used to assess an individual strategy, activity, project, or initiative within a district/school. In most cases, a district/school will approximate multiple levels of this spectrum that exist simultaneously in the totality of community engagement-related activities as they deepen capacity for robust community engagement.

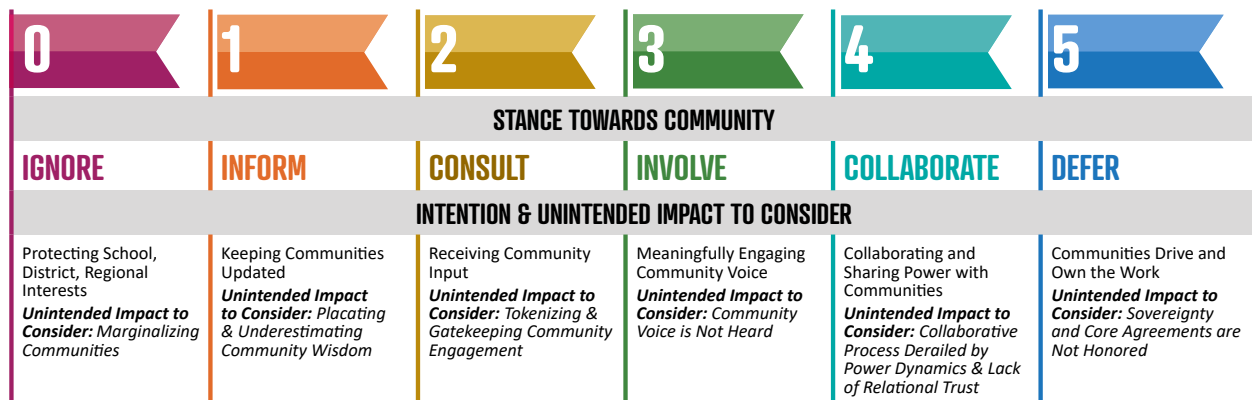
TRIBAL CONSULTATION

Oregon has nine federally recognized tribes that are geographically dispersed, and may need time to convene and engage in planning efforts. Tribes are sovereign governments. Many tribes have an agency for education and a director who can connect the district to its parents and community members. Information on the tribes including contact information is available on the [Oregon Tribal page](#).

REQUIRED TRIBAL CONSULTATION ASSURANCES

If you are a district receiving greater than \$40k in Title VI funding or have 50% or more American Indian/Alaska Native Students, you are required to consult with your local tribal government. As evidence of your consultation, you will be asked to upload documentation of your meeting(s) containing signatures from tribal government representatives as well as School District representatives. As this consultation includes all aspects of the Integrated Plan you will be asked to upload the "Affirmation for Tribal Consultation" within this application.

LEVELS OF COMMUNITY ENGAGEMENT



Preview of the CE Spectrum, see the Community Engagement Toolkit for the full framework

Applicants are highly encouraged to review and reflect on the community engagement spectrum and the other resources, strategies, and examples included in the toolkit that expand on each level of community engagement.

WHAT IS EVIDENCE OF GOOD COMMUNITY ENGAGEMENT?

The [Community Engagement Toolkit](#) provides a number of specific Oregon examples of what good community engagement looks like, sounds like, and feels like in practice. Good engagement may include some discomfort or disequilibrium for school or district leaders as they stretch into new roles and processes.

In submitting integrated guidance plans, applicants are required to demonstrate evidence from community engagement efforts, including key artifacts that indicate connections between these efforts and the plans that were created. Suggestions of good artifacts or evidence include:

- **Artifacts that indicate the content of the engagement effort.** For example, a sign-up sheet only indicates who attended an event, while meeting minutes indicates what was shared and discussed during that event.
- **Artifacts that were created by partners beyond the applicant team,** including being created by students, families, and communities themselves. For example,

if the engagement event is a gallery walk, artifacts from this could be the posters the community creates for each other to examine key issues.

- **Artifacts that provide a realistic sense of the level of community engagement that actually exists -** artifacts that are truthful in where your community engagement efforts exist along the community engagement spectrum and do not suggest a higher level than what is actually happening.
- **Artifacts that create clear connections** between your engagement efforts and the ways they informed your integrated guidance plan.
- **Artifacts that provide evidence of strengths-based, trauma-informed, equity centered practices.** For example, making certain that engagement spaces and processes are safe, inclusive, provide adequate nutrition, child care, translation/ASL services, and that meetings are held when a majority of students and families are able to attend.

Additionally, consider the following as you collect these artifacts of engagement:

- Always ask for consent that includes the purposes by which you are creating an artifact of the engagement (e.g., if you are taking pictures, share how you will use them and offer to share them for the community to also own). Communities should not be tokenized for their value or extracted⁵⁸ from because they are required to be engaged.

⁵⁸ Extraction in this context is the instrumentalization or taking from communities without their consent, full knowledge, or for the benefit of others besides the community. For more, see "[Stop Taking and Extracting from Communities of Color](#)"

- Consider how the communities wish to be shared or represented, and if you are in a collaborative mode of engagement (e.g., level 4 of the SIA spectrum), consider how these artifacts can be co-constructed or generated by communities.

Finally, the requirements in this guidance to engage communities are not just intended to serve the outcomes, strategies, and activities in your integrated guidance plans, but to support historic, current and future efforts to build relationships with your communities. When planning community engagement efforts and events, consider who on your team/district has relationships with families/communities, how to avoid false promises that could erode trust down the road, what pre-existing groups or community engagement mechanisms exist that you could utilize, and how you will continue to follow-up with communities to demonstrate the ways in which you've followed through on commitments, evolved, and continued to learn about your own strengths and learning edges related to equity awareness and practice.

ENGAGING ON MULTIPLE PROGRAMS FOR STUDENT AND COMMUNITY UNDERSTANDING

This integrated guidance presents the opportunity and requirement for applicants to engage communities for all six integrated programs plus CTE, not just SIA and CTE who formerly held this requirement.



Strategies and approaches to consider:

- Understand how the programs intersect and which goals you can support and get input on that thread across multiple programs
 - Clear awareness of integrated funding -- what is available to the region/district -- avoiding false promises and building trust
- CTE-Meaningfully engage currently hidden populations (such as justice-connected youth and adults; single parents; and learners experiencing homelessness, high mobility, or other instability in their housing situation) as they are often placed on the margins of the education and workforce systems
 - Look beyond those individuals (including students, staff, and community members) that are typically part of the discussion, and to new perspectives to understand the scope of the institutional barriers and to gain insight on program improvement
- Leverage local employer engagement which allows for systems thinking beyond graduation
- Build on the systems and work created through previous improvement planning and implementation

COMMUNITY ENGAGEMENT IN SMALL OR RURAL DISTRICTS

Community engagement is vital regardless of the size of a district. Still ODE recognizes that the requirements for districts with an Extended ADMw of 100 or lower should be realistic and better match reality. Applicants will still be required to show evidence of engagement with each applicable focal student group, their families, and staff. The number of artifacts required to show evidence of quality engagement are reduced from five to two. The two artifacts must reflect two different strategies to engage the community, focal students, and staff in the planning process.

INTEGRATED NEEDS ASSESSMENT

The process of assessing needs is a critical part of the continuous improvement cycle. As applicants approach assessing the needs in their district, it is important to have a clear understanding of the various processes and tools available and / or required.

- A **needs assessment** is a process, supported by tools, that unfold and build over time. The information gathered through the process is then used to help teams and communities prioritize improvement efforts and to ensure the equitable implementation of policy, practices and procedures that translates into resource allocation, education rigor, and opportunities for all students, especially historically and currently marginalized youth, students, and families including civil rights protected classes.

A comprehensive and integrated needs assessment examines practices, systems health and program quality, is informed by community input and yields the best results when honest reflective discussion considering multiple viewpoints are included as part of the process. It includes a robust analysis of disaggregated student performance data including trends for focal student groups. Root cause analysis may also be conducted to further examine core issues impacting outcomes.

Needs assessment tools support applicants to capture a moment-in-time analysis of needs. It can offer a summary of the deep work done through ongoing engagement and needs assessment processes. A summary, or highlights, of the needs assessment is an important artifact and can be used when sharing proposed priorities, outcomes and strategies with the community, and be further vetted for alignment with community input.

COMPONENTS OF AN INTEGRATED NEEDS ASSESSMENT PROCESS

CONSIDER COMMUNITY ENGAGEMENT INPUT

Community engagement efforts provide critical information. It is important to review input, to notice and document patterns and trends that have emerged when assessing needs. Trends and themes may vary across community groups including students, focal groups, families and community partners.

REVIEW DISAGGREGATED DATA

Multiple sources of information across grades and subject areas, with specific attention to the needs of student focal groups helps to inform the assessment. Other important sources of data about student well-being, climate, feelings of belonging, attendance and behavior are also factored into the process. In addition to student data, it is important to review staff data such as retention rates, staff to student ratios, staff well-being, etc.

IDENTIFY PRIORITIES ALIGNED TO THE FOUR COMMON GOALS

Review the four common goals introduced in Section 1. They represent shared goals across the six programs in this guidance and are aligned to [Oregon's State ESSA plan](#).

AN INTEGRATED NEEDS ASSESSMENT TOOL

A new [integrated needs assessment](#) that aligns questions previously required for applicants by the separate programs addressed in this guidance is now offered for applicant use in preparation for the integrated application in March 2023. The integrated needs assessment is designed to capture the moment-in-time analysis of needs. It is a summary of the deep work done through the comprehensive needs assessment and is aligned with the four common goals shared across the six programs.

A summary, or highlights, of the needs assessment is an important artifact and can be used when sharing proposed priorities, outcomes and strategies with the community, and be further vetted for alignment with community input.

Applicants will not be required to submit their needs assessment to the ODE, but are expected to use the notes captured on the integrated needs assessment to inform their integrated application and integrated planning and budget template.

Additionally, applicants are encouraged to share their integrated needs assessment with their ESD Liaison and / or CTE Regional Coordinator to support regional planning.

CONSIDERATION OF THE QUALITY EDUCATION MODEL

Review the recommendations in prior reports to inform your decision-making. The [QEC reports](#) speak to emerging and best practices while naming essential areas of focus for continuous district and school improvement.

REVIEWING AND USING REGIONAL CTE CONSORTIA INPUTS

CTE Regional Coordinators are experts in developing and improving CTE Programs of Study in partnership with local districts, colleges, workforce partners and employers. Bringing in much needed labor market data and projections and the CTE disaggregated student data to the table, they are a necessary partner in the development of the integrated application. The district application process will use regional CTE priorities and consortium goals as an input to their planning process. The information provided in the integrated application will feed back into the CTE consortia. However, the goals, outcomes, and activities in the individual plan and application should support the regional priorities.⁵⁹

Community colleges are also an integral partner in CTE planning. Whether a community college is a part of a regional consortium, or a direct recipient of Perkins funds, they play a significant and important role in CTE opportunities. All districts working with the integrated guidance should prioritize including their regional community college partners in discussions around CTE plans and activities. The most efficient way is to take advantage of regional meetings through the CTE Regional Coordinator. Community College (CC) CTE programs are directly tied to regional labor market needs, and CC CTE programs will also have local/regional industry advisory committees that meet at least twice a year. Collaborative relationships between postsecondary and secondary schools have mutual benefits for students participating in CTE programs, and benefits for both secondary and post-secondary institutions. Collaboration may particularly benefit students' access to work-based learning opportunities, earning of college credits with a purpose, and smooth transitions to college.

⁵⁹ For districts that are part of a CTE consortium, consortia funds must be used only for purposes and programs that are mutually beneficial to all members of the consortium and may not be reallocated to individual members of the consortium. Consortia funds will flow through the consortium lead, and planning of district funds will enhance regional priorities. The [CTE Policy Guidebook](#) is a useful additional reference.

IMPORTANCE OF COMMUNITY COLLEGE PARTNERSHIPS

Aligning to post-secondary CTE opportunities is an important element of Perkins. When collaboration between CTE instructors and secondary CTE teachers is encouraged and supported by K-12 administrations, benefits can include:

- CTE instructors and CTE teachers working together in Professional Learning Communities (PLC). PLC opportunities strengthen alignment, and teacher practices.
- Secondary CTE teachers may be able to provide dual credit classes in their Program of Study offerings. Students receiving dual credit while in high school may choose to continue their studies at the postsecondary level. Dual credit opportunities can count towards the short-term certificates, Career Pathway Certificates, or a AAS degree that may be available at the regional CC.
- Some of these opportunities can result in students even obtaining a short-term certificate or Career Pathway certificates prior to graduation from high school.

Community College CTE programs can also benefit secondary partners by sharing what work-based learning simulated practices the CC have implemented and sharing how they create and monitor Work Experiences in Community College CTE programs. Secondary schools may have limited resources, so being able to learn from post-secondary practices can lessen the cost and expedite the time it would take secondary partners to research information, curriculum, and practices. Lastly, strong collaboration may allow the secondary partners to have access to opportunities, partnerships and resources that would not be available at the secondary level.

REQUIREMENT TO EXAMINE POTENTIAL IMPACT ON FOCAL STUDENTS TIED TO PLANNING DECISIONS

The Student Investment Account requires three steps that are beneficial to strengthen the integrated plans for all six programs under this guidance:

1. An analysis of academic impact⁶⁰ from the strategic plan put forward including describing how focal student groups will benefit from the plan⁶¹
2. Identification of what funding under what allowable uses will be designated to meet student mental and behavioral health needs
3. Identify which focal student groups might not meet performance growth targets put forward in the plan⁶²

60 See [ORS 327.185](#), 6(a)(B)

61 See [ORS 327.185](#), 7(b)(C)

62 See [ORS 327.190](#), 5(c)

DEVELOPMENT OF A FOUR-YEAR PLAN WITH CLEAR OUTCOMES, STRATEGIES AND ACTIVITIES

Once improvement priorities become clear, articulating those priorities through the integrated application and developing outcomes, strategies and activities for planning and budgeting begins. The general parameters of outcomes, strategies and activities is provided below, and is followed by examples of each.

One thing applicants should keep in mind is that we often first see adult behaviors shift and those shifts lead to changes in student outcomes. Using a causation (if/then) approach can be powerful when developing effective plans.

Outcomes are the changes in health, behavior, actions, attitudes, or policies that impact students, educators, people, groups and organizations with whom your work

is in relationship with. Some changes can be short-term and others can be long-term. What's important is focusing on the specific kind of knowable change that would occur if your efforts were successful. Lagging indicators, such as those included on district and school report cards, or the Longitudinal Performance Growth Targets (outlined in the SIA and included in the integrated application) are long-term changes that would be seen over time. Progress Markers name some of the kinds of changes that ODE is hoping these investments cause over time with the understanding that they likely show the pathway of changes that eventually lead to metrics change. Other local metrics and assessments may provide additional data sources that can point to desired changes, including through mental health data sources.

Example Outcomes:

- Data teams frequently review data that inform a school's decision-making processes, including barriers to engagement and attendance
- Comprehensive literacy strategies, including professional development plans for educators, are documented and communicated to staff, students (as developmentally appropriate), and families
- All students, especially those in focal groups, report an increased sense of belonging at school
- High schools and colleges work together with industry partners to transition students smoothly from program entrance to degree or certificate and into employment in their field
- Reduced number of students referred to the juvenile justice department

Strategies support your long-term outcomes and describe the approach you are planning to take. Strategies are typically implemented in one to three (and sometimes more) years. They may include a theory of action framework and consider resources, context, people and timelines. Applicants will need to be prepared to articulate how their selected strategies were informed by focal groups as part of the integrated application.

Example Strategies:

- Implement a school-wide [Integrated Model of Mental Health](#) inclusive of strengths-based, equity-centered, trauma- and SEL-informed culturally affirming and sustaining pedagogy, and related principles and practices to create healthy, safe and inclusive school environments
- By providing professional learning on early literacy instructional practices, along with coaching and team-planning time for primary teachers, then those teachers will apply early literacy instructional best practices, and students' reading and writing abilities will improve
- Utilize continuous examination of data to determine which students have access to work based learning or career connected learning experiences, or completing at least 3 credits in a CTE Program of Study

Activities are concrete plans, actions, or investments that are oriented to smaller steps or shorter time-frames within the arc of a given strategy or set of strategies.

Example Activities:

- Hire two additional counselors
- Hire a district CTE coordinator to collaborate with and support the CTE Regional Coordinator at the district level
- Purchase SEL curriculum
- Contract for trauma informed professional learning
- Expand CTE FTE to offer additional credits in the computer science Program of Study
- Hire a career connected learning specialist to develop employer/school relationships and to build work based learning opportunities
- Convene partners to examine selection and enrollment practices that may create barriers for all students to participate in career connected learning activities such as dual credit, CTE, and work-based learning experiences

Putting it All Together

OUTCOME

All students will be on track to graduate by the beginning of tenth grade.



STRATEGY

Ninth grade teachers will meet regularly to review student data and identify barriers and supports needed.



ACTIVITY

Ninth grade teachers will take part in professional development based on ninth grade on track research from the University of Chicago.

STRENGTHEN YOUR PLANNING BY REVIEWING STATEWIDE STUDENT SUCCESS PLANS

While not formally required by rule or statute, the intention of state investments in dedicated Student Success Plans informed by community expertise is to have key elements of each plan get scaled and be activated in district and school planning.

[Appendix F](#) has been developed as a valuable cross-reference of each dedicated SSA Plan.

Each plan is also shared here for independent review and to honor the full work of each advisory.

- [American Indian/Alaska Native Student Success Plan](#)
- [African American and Black Student Success Plan](#)
- [Latino/a/x & Indigenous Mexican, Central, South American, and Caribbean Student Success Plan](#)
- [LGBTQ2SIA+ Student Success Plan](#)

As you create and implement your equity lens, consider how the groups and voices you wish to prioritize may also be represented in these plans and how you can engage with these plans to support them.

ACTIVITIES THAT WOULD ADVANCE MENTAL HEALTH AND WELL-BEING INCLUDE:

Making space and resourcing the time for daily care and connection activities. See [Care and Connection Activities](#), and [Preparing for Breaks and Transitions with Care and Connection](#) for ideas.

Giving staff permission and resourcing dedicated time daily to create opportunities in the classroom and the school building to focus exclusively on care, connection and community building.

Explicitly giving staff permission and resourcing the time to employ creative, expressive teaching and learning strategies (see [Care and Connection Activities](#)) to ensure strengths-based, trauma-informed, equity-centered environments where students can express their experiences and their learnings in ways that are self-directed and empowering.

Spending on communications activities that encourage students and staff to make use of mental health services and supports.

Providing all school community members with a comprehensive list of local resources that are visibly posted on school and district websites.

Resourcing professional learning opportunities, including communities of practice, focused on building mental health literacy and increasing knowledge and skills for working with individuals with mental, emotional, and social challenges.

SECTION 3: FINANCIAL STEWARDSHIP



OREGON
DEPARTMENT OF
EDUCATION

SECTION 3: FINANCIAL STEWARDSHIP

Section Snapshot

This section provides both the information and key templates to match resources to your planning. This includes explaining basic resource flows, braiding and blending of funds, and detailed information about the required Integrated Planning and Budget Template. A core goal of this guidance is to support districts and school communities to see and understand how resources can support their strong planning while interrupting the habit of reactively planning for funds as they've been parsed through state programs.

FUNDING BASICS

The following table provides a state-level picture of the funding for each program where funds are available for grantees. Specific allocations for each district, school, or grantee are provided at regular intervals tied to legislative decision-making and adjusting for changes in ADMw⁶³. A more detailed chart of allowable uses tied to each program is available in [Appendix H](#).

Fund Source	Statewide Total for 21-23 ⁶⁴	Allocation Calculation	Allocation Method ⁶⁵	Indirect Rate	Timelines for Spending
HSS	\$307,323,223 ⁶⁶	Based on Second Period extended ADMw; calculated yearly	Reimbursement	Limited to 4 percent of the grantee's total allocation.	Funds not spent in year 1 of the biennium can roll over to year 2 of biennium; can request summer extension
SIA	\$892,276,973	Based on Second Period extended ADMw; calculated yearly	Disbursement	Limited to 5 percent of the total expenditures or \$500,000, whichever is less. Any indirect costs incurred by a participating charter school must be accounted for within the sponsoring school district's overall limit of 5 percent or \$500,000, whichever is less.	Annual funding July 1 - September 30 with no rollover, universal summer extension. If opting out of the summer extension, annual funding July 1 - June 30.

63 See ORS See ORS 327.013 for what constitutes ADMw.

64 Resource totals for the 23-25 Biennium can be estimated in Jan-March of 2023 and are usually set at the end of the Legislative Session on odd years, the next being June 2023.

65 There are two allocation methods, both described in the glossary. In short, disbursement allows for an EGMS claim to receive a percentage of funds in advance of expenditure where reimbursement is when claims are made following expenditure.

66 Does not include \$16,571,429 in carry forward from 19-21.

Fund Source	Statewide Total for 21-23 ⁶⁴	Allocation Calculation	Allocation Method ⁶⁵	Indirect Rate	Timelines for Spending
CTE	\$32,000,000 \$12,000,000 to secondary districts/consortia	Based on US Census data of ages 5-17 students and poverty rates Must have at least one CTE Program of Study to be eligible for funding	Reimbursement	Max 5 percent admin - direct/indirect	Grant award July 1-Sept 30 of the following year annually; final claims by Nov 15
EDM	\$6,752,151	EDM is not planning to have individual school district grants this biennium.			
EIS	\$3,650,500	Based on ADM	Reimbursement		Yearly allocation July 1 - June 30, with no rollover from year 1 to year 2 and no summer extension



ELECTRONIC GRANT MANAGEMENT SYSTEM CLAIMS (EGMS)

While ODE works towards alignment of these six programs, there are some structures that will remain unchanged:

- Financial claims will operate on a different calendar than the submission of expenditure reports.
- Claims will be submitted by the fiscal agent for the grant agreement and if you are operating as a district sponsored charter or in a consortium then funding will either be expended or disbursed according to the agreed upon conditions set forth in your District Charter Agreement or Memorandum of Understanding.
- Perkins consortium grants will be made to the fiscal agent for the consortia and all EGMS claims and financial management will be the responsibility of the fiscal agent.
- The SIA will remain a disbursement grant where funding is claimed in 25% increments for each quarter prior to expenditures taking place.
- All funding streams, other than SIA will remain as reimbursement grants where claims will need to be submitted in EGMS after grant funding has been spent.

Taking into account the administrative burden of grantees to continuously submit claims in EGMS, ODE proposes all fiscal agents submit their claims during the following designated windows for either reimbursement or disbursement:

Claim Window	Amount of Claim for SIA	Amount of Claim for all other programs (CTE, HSS, EHS, CSI/TSI)	Perkins Federal (CTE)
July 1, 2023			20% allocation available for 2023-2024 grant award
July 1- July 30, 2023	25% of allocation	No cap on claim amount	
September 30, 2023			All funds from 2022-2023 grant award must be obligated
October 1- October 30, 2023	25% of allocation (up to 50% total)	No cap on claim amount	100% allocation available for 2023-2024 grant award
November 15, 2023			All claims on 2022-2023 grant award must be completed.
January 1- January 30, 2024	25% of allocation (up to 75% total)	No cap on claim amount	
April 1- April 30, 2024	25% of allocation (up to 100%)	No cap on claim amount	
June 30, 2024		HSS: Any unclaimed Y1 funds will remain open throughout Y2	

*Reimbursement claims will continue to be reviewed and approved on a rolling basis; however, ODE encourages fiscal agents to claim larger amounts of funding less frequently.

*CTE Perkins federal funds will flow through consortia fiscal agents for member districts.

BRAIDING AND BLENDING FUNDING

Combining funds from various program sources is a strategy that can ensure consistency, eliminate duplication of services, and allow recipients to strategically direct funding allocations. Commonly referenced as the “blending and braiding of funds,” and often utilized in reference to leveraging both federal and state funds, this approach helps to ensure maximum benefit to students and flexibility to recipients.

There are many ways to braid and blend funding to sustain more powerful impacts. And there are also important cautions and considerations as not all funds can be used in the same ways and key principles of financial management must be practiced to bring funding sources together while maintaining strong and transparent accounting. One example of blending and braiding funds is in the development and [financing of community schools](#)⁶⁷. ODE’s [Summer Best Practices Programming Guide](#) is also a rich and practical resource.

The starting point to braiding and blending funding is to have a clear plan with clear outcomes and strategies. This is essential because you want the plan to then be met by resourcing strategies that can include the programs in this guidance alongside other existing resources and through the development or use of new or community resources, as well.

“While this sounds reasonably straightforward, creating a financing plan isn’t just about spreadsheets and funding sources. It requires nuanced relationship building, sound policies and programs, and a well-developed strategy.”

- Sharon Deitch, Financing Community Schools

UNDERSTANDING AND NAVIGATING SUPPLEMENT AND SUPPLANT

Both federal and state laws speak to distinctions between when a fund source (a grant program) is allowed to supplant, meaning replace a prior existing use of a different fund source, versus where a fund source is only allowed to supplement, meaning it comes in addition to and is expected to be used in addition to existing resources. There are important legal and technical distinctions that both ODE and each district is required to adhere to and this explanation should not be seen as legal advice or counsel.

Federal funds allocated through ESSA partnerships, ESSA Title Programs, IDEA, and the Perkins Act (CTE) are governed by a “supplement not supplant” provision. This should not prohibit districts from administering the activities that enhance student learning and are aligned to district goals. Districts must show that federal funds do not replace state and local funding when administering. A notable exception to this are the Federal ESSER I, II, and III funds which are not subjected to the supplement not supplant rules and considerations, as a result, districts have flexibility to allocate those funds in a manner consistent with their ESSER III District Plan, district priorities and students academic and social strengths and needs.

High School Success is a state program and funding source that also contains a supplement not supplant provision. ORS 327.874 states: *A school district must use the amount apportioned under ORS 327.859 to establish or expand programs, opportunities and strategies under ORS 327.865, 327.868 and 327.871 and may not use the amount apportioned to maintain programs, opportunities and strategies established prior to December 8, 2016, except when a use is necessary to replace the loss or expiration of time-limited grants or federal funds.*

The Student Investment Account does not contain a provision speaking to supplementing or supplanting.

67 Financing Community Schools: A Framework for Growth and Sustainability. Deich and Neary. (2020)

The table below provides examples of previously utilized programmatic plan strategies or activities that have or could receive funding from the sources indicated.

Strategy/Activity	SIA	HSS ⁶⁸	EIS	PERKINS ⁶⁹
Develop and implement an integrated model of mental health in order to support students feeling a sense of belonging and safety.	✓	✓	✓	✓
Develop additional academic supports through a tiered approach aligned to the needs of our English Learners.	✓	✓		✓
Round out our middle and high school curricular offerings to expand CTE, as well as advanced and dual credit courses that are accessible to each and every student.	✓	✓		✓
Implement a reliable, easily accessible electronic data system that supports educators and leaders to identify student strengths, growth areas, and progress toward graduation in multiple dimensions for students as allowed by a given fund source, including learning progress, school engagement, social/emotional wellness, and family engagement.	✓	✓	✓	
Create Community-based Family Liaison position(s) in all communities in our district, provide continuity of partnership and support (with families identified through EIS, IDEA, Title I, and other specific supports) and eliminate the possibility that a family is disconnected from the school.	✓		✓	
Develop an equitable funding model for rural regional leadership support and development that involves leadership equalization funds, additional professional learning funds and a travel differential to ensure equitable access to high-quality programs, experiences and instructors.				✓
Develop a system where students are monitored and support is provided to help ensure on-time graduation, including things like graduation coaches, student success coaches, and time for teachers to collaborate	✓	✓	✓	
Develop a system where students are encouraged to enroll in college level courses and have college level opportunities and access other advanced courses. Barriers like cost or access are removed and students are actively encouraged to participate. Note: Perkins cannot be used for tuition costs but can assist with program development, professional development, advising and counseling.	✓	✓		✓

RELEVANT RESOURCES

There are several other useful documents produced by ODE and other entities that can provide insight into both technical and strategic aspects of leveraging multiple sources of funds, including:

- Appendices A, B, and C of the [ESSA Oregon Guide](#) (2020)
- [ESSA Quick Reference Brief: Supplement not Supplant](#)
- [ODE Summer Learning Best Practice Guide](#) starting on page 29
- [Financing Community Schools, a Companion Brief to the Community Schools Playbook](#) - Pages 14-34

68 High School Success allowable expenses are grades 9-12 with 15% of a recipients’ overall allocation allowable to support 8th grade students. Expenses that span outside of allowable grade levels must be prorated.

69 CTE/Perkins funds support CTE Programs of Study through quality program development, materials and equipment and professional development, but CTE Regional Coordinators have extensive knowledge to assist with building systems with workforce partners, employers advisory committees and colleges.

BUDGETING WITH CTE REGIONAL CONSORTIA

- Applicants participating in CTE Regional Consortia need to work with CTE Regional Coordinators to build regional priorities and discuss how local use of funds may be braided to support local and regional goals simultaneously.
- CTE Regional Coordinators are responsible for submitting the goals and budget for the CTE Regional Consortia funds separately from the district application. This requires close conversation and collaboration in the overall budget integration process. Districts that are part of a Regional CTE Consortium will not have the ability to submit budget information directly under CTE. Districts that are directly awarded CTE-Perkins funds will.
- Districts that are part of a CTE consortium should consult their regional Consortia Handbook information regarding the use of Federal Perkins funds in the purchase of equipment. Make sure to work with the CTE Regional Coordinator to work out issues around the purchasing processes, inventory and equipment ownership and maintenance requirements.

FINANCIAL STEWARDSHIP OPPORTUNITIES WITHIN BUDGETING AND PLANNING PROCESSES

Alongside the real and significant collaboration responsibilities of school leaders with community and educators, ODE highly recommends increased collegiality and collaboration between business officers, administrators, building leaders, and educators. There are consistent opportunities to improve understanding district decision-making, allocation methods, and how program or fund leadership is established. This topic gets some attention in the Every Student Succeeds Act (ESSA) and is part of K-12 accreditation processes. More importantly, it is a place where better outcomes for students can be realized even if out of the formal requirement scope of this guidance.

The processes outlined in this guidance are aligned with budget best practices and the [Local Budgeting Manual](#) published by the Oregon Department of Revenue.

USING THE INTEGRATED PLANNING AND BUDGET TEMPLATE OVERVIEW

[A single integrated planning and budget template](#) has been developed for this guidance and its completion is required. The tool is designed to center your planned outcomes and strategies to the discrete activities and associated expenditures for funds distributed across all six programs outlined in this guidance. It is designed to assist in multiple years of planning and budgets.

An additional [technical guidance document](#) to support your use of the budget template has been developed. We highly recommend you review the guidance document and template together ahead of your planning process.

TIERED PLANNING

Tiered Planning refers to an applicant's approach to proactively anticipate and consider modifications to their planned activities and expenditures as a result of workforce shortages or other scenarios where initial activities may require adjustment. **This is one of the best approaches to avoid having to make significant plan amendments within a year or biennium as it takes into account the important process requirements in planning while offering flexibility based on changing conditions.** When executed well, tiered planning increases the ability of the applicant to be nimble in moving in their implementation and move quickly

to address shifts or gaps in implementation due to unforeseen scenarios. It creates conditions for applicants to respond well to change, and maintain focus on the intended outcomes of these investments.

Tiered planning can be difficult to implement as you cannot necessarily trade activity for activity due to specific statutory requirements. If, for example, an activity that uses HSS funding is no longer able to be completed and needs to be replaced with another activity the recipient should work with the ODE team to ensure that the replacement activity, while already approved within the larger scope of the investment, still meets HSS spending requirements set by statute. Tiered planning allows for faster changes to plans but still necessitates a touch point with ODE staff to implement.

Any tiered planning expenses are detailed in the “Additional and Tiered Planning Tab” of the budget template.

**TIERED PLANNING IS AN
IDEAL WAY TO REDUCE LATER
IMPLEMENTATION CHALLENGES**

A strong plan with community-informed alternatives for additional tiered expenses can help smaller districts minimize going through rigorous process requirements within a given year or biennium.

SECTION 4: PREVIEW OF THE INTEGRATED APPLICATION



OREGON
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SECTION 4: PREVIEW OF THE INTEGRATED APPLICATION

Section Snapshot

This section provides the information that ODE will ask applicants to submit during the application submission window scheduled for March 1, 2023 to March 31, 2023.

APPLICATION PREVIEW

The application under this guidance is completed once every two-years. This preview of the Integrated Application is created for information, planning, and preparation purposes only. This preview shares the content of what applicants will be asked to respond to or submit through an application portal. It may be revised slightly for clarity, logistics, useability, or formatting purposes based on feedback from the education field and community.

The application is the articulation of the analysis done through your comprehensive needs assessment process, including ongoing community engagement, QEM review, application of an equity lens, and data analysis used to develop your overall four-year plan including outcomes, strategies, and activities.

As you complete your Integrated Application, it is important to note this application will be submitted for board approval, is public record, and will likely be reviewed by the media. Word limits are set to encourage applicants to be both thorough and concise.

NEEDS ASSESSMENT SUMMARY

(500 WORDS OR LESS)

Please offer a description of the comprehensive needs assessment process you engaged in and the high level results of that needs assessment. Include a description of the data sources you used and how that data informs equity-based decision making, including strategic planning and resource allocation.

PLAN SUMMARY

(500 WORDS OR LESS)

Your plan summary will help reviewers get quick context for your plan and the work ahead. In the coming months, you may also use this process to quickly explain to the community, local legislators, media, and other partners how you are braiding and blending these investments. Please share the exact needs or issues the investments will address as outlined in your four year plan and as it relates to the purposes stated in law for all applicable programs, and what processes you'll put in place to monitor progress toward addressing those needs.



EQUITY ADVANCED

(250 WORDS OR LESS PER QUESTION)⁷⁰

- What strengths do you see in your district or school in terms of equity and access?
- What needs⁷¹ were identified in your district or school in terms of equity and access?
- Upload the equity lens or tool you used to inform and/or clarify your plan & budget. Describe how you used this tool in your planning.
- Describe the potential academic impact for all students AND focal student groups based on your use of funds in your plan.
- What barriers, risks or choices are being made that could impact the potential for focal students to meet the Longitudinal Performance Growth Targets you've drafted, or otherwise experience the support or changes you hope your plan causes?
- What policies and procedures do you implement to ensure activities carried out by the district do not isolate or stigmatize children and youth navigating homelessness?

CTE FOCUS

- What strengths do you see in your CTE Programs of Study in terms of equity and access?
- What needs were identified in your CTE Programs of Study in terms of equity and access?
- What is your recruitment strategy, and how does it ensure equitable access and participation in CTE Programs of Study?
- How will you ensure equal access and participation in your CTE Programs of Study among focal student groups? How will you ensure there is no discrimination for focal student groups?

⁷⁰ Section 1112(b)(1-13) of the Elementary and Secondary Education Act describes requirements to be included in school district plans "to ensure that all children receive a high-quality education and to close achievement gaps." Some of the questions that follow align to federal requirements.

⁷¹ These needs should directly inform your planning & budgeting.

WELL-ROUNDED EDUCATION

(250 WORDS OR LESS PER QUESTION)

- Describe your approach to providing students a well-rounded education. What instructional practices, course topics, curriculum design, and student skills development are part of this approach? Describe the approaches by grade band (elementary, middle, and high).
- Which disciplines (theater, visual arts, music, dance, media arts) of the arts are provided, either through an integration of content or as a separate class?
- How do you ensure students have access to strong library programs?
- How do you ensure students have adequate time to eat, coupled with adequate time for movement and play?
- Describe how you incorporate STEAM (Science, Technology, Engineering, Arts, and Math) instructional practices, including project-based learning, critical thinking, inquiry, and cross-disciplinary content.
- Describe your process for ensuring the adopted curriculum (basal and supplemental) consists of a clearly stated scope and sequence of K-12 learning objectives and is aligned to all state and national standards.
- Describe your process for ensuring classroom instruction is intentional, engaging, and challenging for all students.
- How will you support, coordinate, and integrate early childhood education programs?
- What strategies do you employ to help facilitate effective transitions from middle grades to high school and from high school to postsecondary education?
- How do you identify and support the academic needs of students who are not meeting or exceeding state and national standards, particularly for focal student groups?
- What systems are in place for supporting the academic needs of students, including for focal student groups, who have exceeded state and national standards?

CTE FOCUS

- How do you provide career exploration opportunities, including career information and employment opportunities, and career guidance and academic counseling before and during CTE Program of Study enrollment?
- How are you providing equitable work-based learning experiences for students?
- Describe how students' academic and technical skills will be improved through integrated, coherent, rigorous, challenging and relevant learning in subjects that constitute a well-rounded education, including opportunities to earn postsecondary credit while in high school.
- What activities will you offer to students that will lead to self-sufficiency in identified careers?
- How will you prepare CTE participants for non-traditional fields?
- Describe any new CTE Programs of Study to be developed.

ENGAGED COMMUNITY

(250 WORDS OR LESS PER QUESTION)

- If the goal is meaningful, authentic and ongoing community engagement, where are you in that process? What barriers, if any, were experienced and how might you anticipate and resolve those issues in future engagement efforts?
 - What relationships and/or partnerships will you cultivate to improve future engagement?
 - What resources would enhance your engagement efforts? How can ODE support your continuous improvement process?
 - How do you ensure community members and partners experience a safe and welcoming educational environment?
 - If you sponsor a public charter school, describe their participation in the planning and development of your plan.
- Who was engaged in any aspect of your planning processes under this guidance?
 - Students of color
 - Students with disabilities
 - Students who are emerging bilinguals
 - Students who identify as LGBTQ2SIA+
 - Students navigating poverty, homelessness, and foster care
 - Families of students of color
 - Families of students with disabilities
 - Families of students who are emerging bilinguals
 - Families of students who identify as LGBTQ2SIA+
 - Families of students navigating poverty, homelessness, and foster care
 - Licensed staff (administrators, teachers, counselors, etc.)
 - Classified staff (paraprofessionals, bus drivers, office support, etc.)
 - Community Based Organizations (non-profit organizations, civil rights organizations, community service groups, culturally specific organizations, etc.)
 - Tribal members (adults and youth)
 - School volunteers (school board members, budget committee members, PTA/PTO members, booster club members, parent advisory group members, classroom volunteers, etc.)
 - Business community
 - Regional Educator Networks (RENs)
 - Local Community College Deans and Instructors; Local university deans and instructors
 - Migrant Education and McKinneyVento Coordinators
 - Local Workforce Development and / or Chambers of Commerce
 - CTE Regional Coordinators
 - Regional STEM / Early learning Hubs
 - Vocational Rehabilitation and pre Employment Service Staff
 - Justice Involved Youth
 - Community leaders
 - Other _____

- How were they engaged?
 - Survey(s) or other engagement applications (i.e. Thought Exchange)
 - In-person forum(s)
 - Focus group(s)
 - Roundtable discussion
 - Community group meeting
 - Collaborative design or strategy session(s)
 - Community-driven planning or initiative(s)
 - Website
 - CTE Consortia meeting
 - Email messages
 - Newsletters
 - Social media
 - School board meeting
 - Partnering with unions
 - Partnering with community based partners
 - Partnering with faith based organizations
 - Partnering with business
 - Other _____

EVIDENCE OF ENGAGEMENT

You will be asked to upload your **top five artifacts** of engagement. Smaller districts, as outlined above, are required to submit their top two artifacts.

- Why did you select these particular artifacts to upload with your application? How do they show evidence of engaging focal student populations, their families and the community?
- Describe at least two strategies you executed to engage each of the focal student groups and their families present within your district and community. Explain why those strategies were used and what level of the Community Engagement spectrum these fell on.
- Describe at least two strategies you executed to engage staff. Explain why those strategies were used. Explain why those strategies were used and what level of the Community Engagement spectrum these fell on.
- Describe and distill what you learned from your community and staff. How did you apply that input to inform your planning?

CTE FOCUS

- How will you intentionally develop partnerships with employers to expand work-based learning opportunities for students?

AFFIRMATION OF TRIBAL CONSULTATION

- If you are a district that receives greater than \$40k in Title VI funding or have 50% or more American Indian/Alaska Native Students, you are required to consult with your local tribal government. As evidence of your consultation, you will be asked to upload documentation of your meeting(s) containing signatures from tribal government representatives as well as School District representatives. As this consultation includes all aspects of the Integrated Plan you will be asked to upload the "Affirmation for Tribal Consultation" within this application.



STRENGTHENED SYSTEMS AND CAPACITY

(250 WORDS OR LESS PER QUESTION)

- How do you recruit, onboard, and develop quality educators and leaders? How are you recruiting and retaining educators and leaders representative of student focal groups?
- What processes are in place to identify and address any disparities that result in students of color, students experiencing poverty, students learning English and students with disabilities being taught more often than other students by ineffective, inexperienced, or out-of-field teachers?
- How do you support efforts to reduce the overuse of discipline practices that remove students from the classroom, particularly for focal student groups?
- How do you align professional growth and development to the strengths and needs of the school, the teachers, and district leaders?
- How do you provide feedback and coaching to guide instructional staff in research-based improvement to teaching and learning?
- What systems are in place to monitor student outcomes and identify students who may be at risk of academic failure? How do you respond and support the student(s) when those identifications and observations are made?
- How do you facilitate effective transitions between early childhood education programs and local elementary school programs; from elementary to middle grades; from middle grades to high school; and from high school to postsecondary education?

ATTACHMENTS COMPLETING YOUR SUBMISSION

- [Integrated Planning & Budget Template](#)
 - The plan must cover four years, with a two-year budget, and include outcomes, strategies and activities you believe will cause changes to occur and meet the primary purposes of the programs included in this integrated plan: HSS, SIA, EDM, CIP, EHS, CTE / Perkins. It also should reflect the choices you made after pulling all the input and planning pieces together for consideration. This plan serves as an essential snapshot of your expected use of grant funds associated with the aforementioned programs.
- Equity lens utilized
- Community engagement artifacts
- DRAFT Longitudinal Performance Growth Targets and any optional metrics
- Affirmation of Tribal Consultation

ASSURANCES

- The applicant provides assurance that they will comply with all applicable state and federal civil rights laws, to the effect that no person shall be excluded from participation in, be denied benefits of, or otherwise be subject to discrimination under any program or activity on the basis of race, color, national origin, sex, sexual orientation, marital status, gender identity, religion, age, or disability.

AFTER APPLICATION SUBMISSION

Applicants will receive a notification from ODE to acknowledge receipt of the application. The notification will include contact information for an ODE Application Manager, a single point of contact as you move from submission to review, and into co-development of Longitudinal Performance Growth Targets and finally, to executing a grant agreement.

SECTION 5: HOW APPLICATIONS WILL BE REVIEWED, EVALUATED, DEVELOPED, AND FINALIZED



**OREGON
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SECTION 5: HOW APPLICATIONS WILL BE REVIEWED, EVALUATED, DEVELOPED, AND FINALIZED

Section Snapshot

This section describes the values and processes applications will move through to complete review.

VALUES AND PRINCIPLES INFORMING ODE'S APPROACH TO THE EVALUATION AND REVIEW PROCESS

ODE has identified four principles that will guide our approach to reviewing applications and co-development of the Longitudinal Performance Growth Targets for each eligible applicant:

1. **Keep it as simple as possible.** In seeking to support nuance and honor different community needs and contexts, the legislature put forward detailed expectations for districts and ODE. Within that framework, ODE aims to keep what it asks of districts and other eligible applicants to document and communicate as simple and tied to the language of the initiatives as possible.
2. **Offer the right amount of challenge and support.** ODE's constant challenge and priority will be to balance offering steady and useful support to applicants while being clear about the role ODE plays to monitor, evaluate, and intervene where called to do so.

3. **Treat "complying with application requirements" like educators treat student work.** As a student applies effort in coursework but needs time to revise, re-engage with materials, or be supported with an accommodation, educators step in to provide needed supports. Likewise, as ODE reviews plans and applications, they must also offer scaffolds and tools to aid applicants in meeting their desired goals and outcomes.
4. **Grow shared responsibility and public confidence.** How we collectively implement this integrated guidance is essential to the outcomes we seek. New ideas and approaches to building shared ownership and growing public confidence are pursued in the process of review so that we can ensure sustained investment and trust over the decades to come⁷².

THE EVALUATION PROCESS

Each application must undergo the following three-step evaluation process for approval:

1. Public Review and Board Approval at the applicant or local level
2. ODE Review
3. Quality Assurance & Learning Panel (QALP) review

⁷² It is worth noting that these six programs represent approximately 10% of operating budgets for most districts with most other funding coming through the State School Fund (SSF). Communities are likely interested to understand how these processes and plans relate to overall district and school budgeting.

2023 REVIEW PROCESS TIMELINE



The timing for this process is outlined as a rough-guide as there are a number of variables, including when applicants submit and the quality of submissions, that can impact these processes.

If a district has required Tribal Consultation, it must be completed before step one of the process outlined above. For more information around Tribal Consultation please consult the [Tribal Consultation Toolkit](#).

STEP 1: PUBLIC REVIEW AND BOARD APPROVAL

Presenting the integrated application to an applicant's governing board is beneficial because investments in education must be accompanied by transparency and accountability. Sharing the application is key to being responsive to community needs and building trust.

Before the application is submitted during the March 2023 submission window⁷³, the four-year application is required to be:

1. Posted to the applicant's website and accessible in their main office;
2. Presented to the governing board with the opportunity for public comment (not a consent agenda item); and
3. Approved by the governing board.

The evidence that must be submitted with the application to demonstrate the three requirements above include:

- URL where application is posted on the applicant's website, and
- Board meeting minutes showing the application was presented with opportunity for public comment and formally approved by the governing board.

⁷³ This aligns with best practice budgeting processes

In order to support a robust engagement process and good stewardship of funding, applicants are recommended to discuss with their communities during the planning process:

- How engagement has helped inform:
 - The alignment and integration of multiple plans including alignment with regional initiatives
 - Braiding of funds to support large overarching goals across initiatives without losing the specific aims or focus of each initiative
 - Any complexities in the adjustment and development of the new application
- New learnings and priorities raised from community engagement and ongoing partnerships
- Next steps or processes to continue to receive funding

STEP 2: ODE REVIEW

The next step in the application review process will be completed by ODE. This will be completed in two stages. First, ODE staff supporting applicants in a given region will review for completion and provide any key context notes. Then, ODE staff reviewers trained to review and evaluate plans according to the evaluation criteria and overall ODE guidance will complete the formal review. Attention will be given to teaming ODE reviewers who bring a diversity of lived and professional experience.

The purpose of the ODE review is to conduct a comprehensive evaluation of the application to ensure all of the following:

1. Application completion
2. Legal sufficiency
3. Clearly defined use of funds that meets the intent of the laws

ODE reviewers evaluate the information submitted and make an assessment using the criteria listed below:

1. Planning Process and Community Engagement
2. Plan and Budget
3. Public Review and Board Approval

ODE will release the criteria by which applications will be reviewed by ODE to meet requirements in late Fall 2022.

ODE reviewers will have access to applicant's disaggregated data. Reviewers will reach agreement on one of four assessments:

- A. Application meets requirements
- B. Application will meet requirements with small changes
- C. Application needs additional review to determine if requirements have been met
- D. Application needs significant changes to meet requirements

For each application, reviewers will develop and complete a distillation of their findings to present to a Quality Assurance & Learning Panel (QALP). This will include a summary of the application, location and demographic information of the applicant, description of community engagement, planned uses for funds and the sharing of the reviewers' assessment regarding if the applicant complied with all requirements.

STEP 3: QUALITY ASSURANCE AND LEARNING PANEL

In alignment with our commitment to develop shared responsibility and confidence in our public schools and to facilitate learning within and across schools, districts, and communities, the final step of the application review process will consist of a Quality Assurance & Learning Panel (QALP) review. The panel review is not determining whether or not an application meets the requirements. The panel review is either affirming or challenging the assessment made by ODE staff and spurring additional review processes for that given application. The basic concept is to bring together, virtually, panels of people to review and affirm/challenge the determination made by ODE staff while also increasing learning about the work being done in districts, charter schools, YCEPs, JDEPs, regions, and communities across the state of Oregon.

The purpose of the Quality Assurance and Learning Panel is to:

1. Support public understanding and grow confidence in the implementation of the various initiatives
2. Create conditions conducive for learning across districts and communities
3. Support ODE's review efforts with a quality check

[More information about panel composition and review process is available here.](#)

ADDITIONAL ODE REVIEW

When it is determined and affirmed by the QALP that additional review is required, the directors in the office of EII and overseeing Perkins V-CTE will meet and provide additional review for any applications that are advanced to this step. This team will meet with the initial ODE staff reviewers and consider notes from the Quality Assurance and Learning Panel. Applicants and their supporting ESDs may be consulted or engaged with additional questions in this process. The team will make a final assessment and determination. If needed, Assistant Superintendents in EII and the Office of Teaching, Learning, and Assessment will be consulted and make any final decisions.

STEP 4: CO-DEVELOPMENT OF LONGITUDINAL PERFORMANCE GROWTH TARGETS (LPGT):

After ODE and QALP reviews, the application process moves into work to co-develop and solidify Longitudinal Performance Growth Targets which are addressed in more detail in Section 6 and in [Appendix I](#).

While asked for at the time of application submission, ODE will not consider the growth targets and related documentation as part of its review and determination if application requirements have been met. Co-development and agreement on a monitoring and evaluation framework for each applicant, including the Longitudinal Performance Growth Targets, will take place once an applicant has been determined to meet all requirements. ODE does not recommend governing board approval of the Longitudinal Performance Growth Targets or any other evaluative criteria until LPGTs are finalized by the applicant and ODE and inserted in a corresponding grant agreement. The finalized grant agreement (inclusive of the LPGTs) will then go before the local school board for approval prior to its execution by ODE procurement and funds being released to the grantee.

SMALLER DISTRICTS ARE RELEASED FROM LONGITUDINAL PERFORMANCE GROWTH TARGET SETTING

Detailed further in Section 6, Oregon's smallest districts are required to be members of a CTE regional consortium, but for the other programs contained in this guidance, ODE will focus solely on the local optional metrics and the progress markers as described below.⁷⁴

ODE will support applicants in co-developing LPGTs in collaboration with ESD Liaisons. This work will include finalizing baseline, stretch, and gap-closing targets for each of the common metrics. The aim of this co-development effort is to create meaningful opportunities for grantees to re-analyze current data, center focal student groups, and support public transparency and learning, while not being penalized for complexities in the current available data.

⁷⁴ Small districts must still comply with all Perkins monitoring and reporting requirements as part of a CTE consortium.

OPTIONAL REVIEW PROCESS TO SUPPORT STRONG PLANNING AND APPLICATIONS

The more opportunities to share and elicit meaningful feedback around an application the better it will be. Below are some optional review processes that districts and schools have engaged in the past. Please consider using some or all of these as you are developing your plan and application:

- Self-assessment
- Work with your ESD and CTE Regional Coordinator
- Include your local community colleges and universities
- Peer Reviews to share best practices between schools and districts as well as to provide feedback to one another
- Charter schools may wish to solicit feedback from their sponsors
- Check your work against consistent patterns of feedback that have held up submissions in the past

SECTION 6: MEANINGFUL REPORTING, MONITORING, AND EVALUATION PROCESSES



**OREGON
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SECTION 6: MEANINGFUL REPORTING, MONITORING, AND EVALUATION PROCESSES

Section Snapshot

This section describes an integrated approach to reporting, monitoring, and evaluation of impact and performance across the six aligned programs. This includes attention to local optional metrics, the skilled use of early indicator and intervention systems, meeting state CTE Perkins Performance Targets, working with progress markers, developing and finalizing Longitudinal Performance Growth Targets, and quarterly and yearly reporting. The responsibility and opportunity to share a performance review back to your community and board, revisiting if investments reached outcomes you were aiming for, is outlined. This section also includes information about the auditing steps required only under the Student Investment Account.

ODE'S APPROACH TO SHARED RESPONSIBILITY FOR PROGRESS

One of the challenges consistently raised to ODE and to legislators is the impact of having different terminology and processes to report and evaluate on progress related to different state and federal grant programs. For the six programs integrated here, the effort is being made to operationally align these processes for applicants. This will make for stronger reporting. This section reflects approaches to monitoring and evaluation that can support overall district and system improvement efforts. The terms "monitoring and evaluation" can create concern amongst educators. Here we are talking about the best version of processes that both meet our shared responsibilities for student outcomes as well as system and community health in ways that reflect what we value and can learn while tending to the constraints set forward in statutes and rules.

Working together, we can avoid accountability pitfalls experienced in No Child Left Behind, Race to the Top, education compacts, and other education initiatives over the last few decades. Previous accountability measures often served to narrow the curriculum, using shame and blame of schools as an overly simplistic tactic while offering over-promised or oversimplified outcomes. These efforts would often be distilled in media reports as news that was mostly about rankings and failed to offer enough nuance, depth, or realism to the important work of school improvement.

ODE is applying the following values in setting out guidance in this area:

1. **Monitoring and evaluation is central to learning.** Supporting the development and use of measures that are authentic, ambitious and realistic, and consider student and system growth over time is essential to support system learning and successful program implementation.
2. **Context matters.** Oregon has several districts with more than 10,000 students. It has almost as many districts with fewer than 10 students. Approaches to the development and monitoring of Longitudinal Performance Growth Targets must be flexible, responsive and adaptive.
3. **Progress is not linear and all measures of progress are not created equal.** We have the opportunity to develop and grow an approach to monitoring and evaluating systems for district learning as well as performance.
4. **Shared responsibility.** ODE is responsible for ensuring that taxpayer dollars are being expended appropriately in compliance with federal and state laws, regulations and policies, while also meeting the intent of the legislation and enacting real change in districts, charter schools, communities and the lives of students.

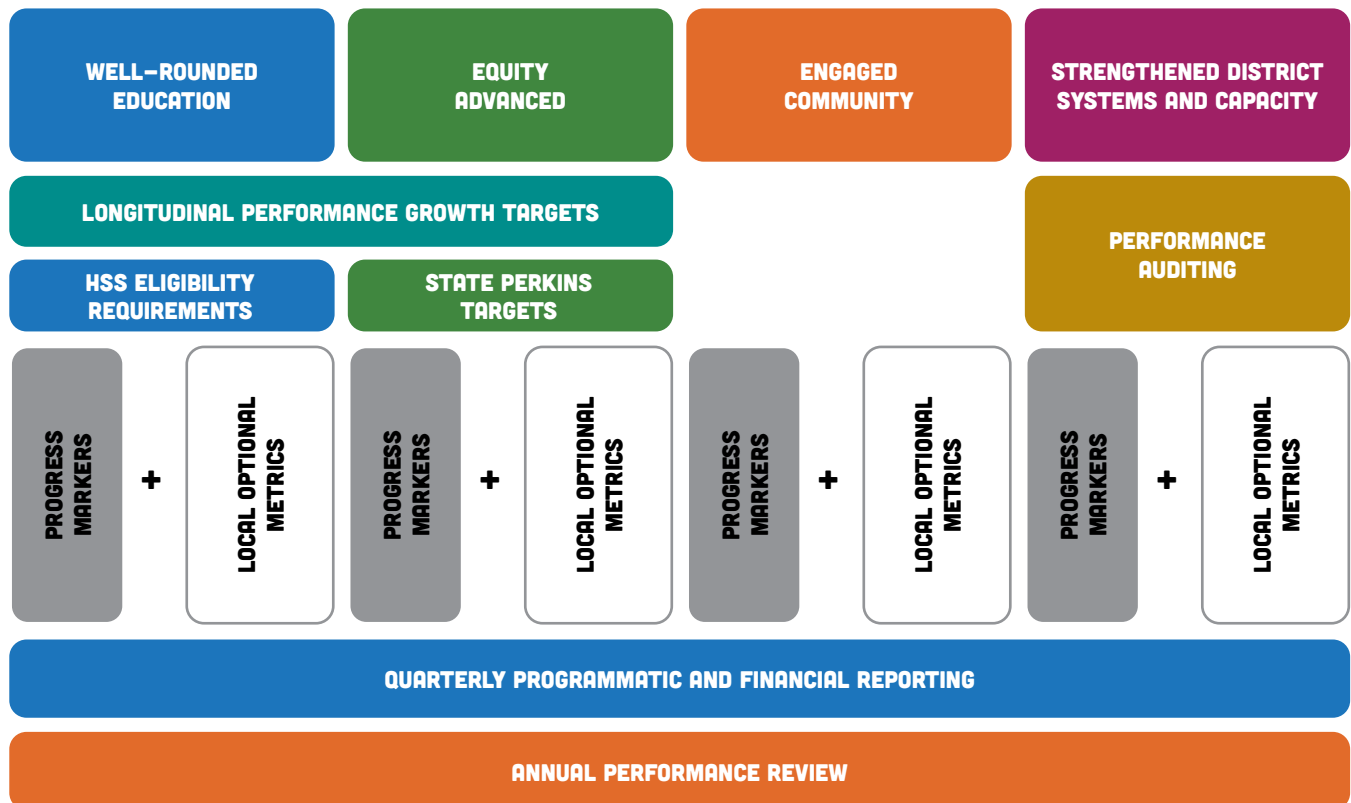
5. **Stay focused on the core purposes of each initiative, while seeing a bigger picture.** Each of the six initiatives covered in this guidance has distinct and complementary purposes. Our approach to evaluation must be able to both demonstrate the value and impact of a given initiative to its core purposes and take into account the contributions and intersections of each of the aligned initiatives.

SUMMARY OF PERFORMANCE MEASURES

There are seven distinct performance measures and processes used in the monitoring and evaluation process for implementation under this integrated guidance:

1. Longitudinal Performance Growth Targets (LPGTs)
2. High School Success Eligibility Requirements
3. State CTE Perkins Performance Targets
4. Progress Markers
5. Local Optional Metrics
6. Quarterly and Financial Reporting
7. Annual Reporting
8. Auditing (SIA funds only)
9. Performance Reviews

Here's one way to visualize how these evaluation components fit together:



In the details that follow, a more precise picture of what contributes to success is put forward. There are clear Performance Measures and Targets within CTE Perkins and the co-development of Longitudinal Performance Growth Targets with applicants.

ODE is also sustaining use of progress markers to help set clear indicators of the kinds of changes we'd expect to see over time but likely ahead of changes in traditional educational metrics.

Finally, recipients are encouraged to make full use of their freedom to develop and set local optional metrics as a means of demonstrating how these significant resources are being well used to further the outcomes put forward in the planning process.

ATTENDING TO OREGON'S SMALLEST DISTRICTS

ODE recognizes the importance of local context and the need for a differentiated approach for very small districts, especially those with an Extended ADMw enrollment of 100 or lower. Oregon's smallest districts are required to be members of a CTE regional consortium,⁷⁵ but for the other programs contained in this guidance, ODE will focus solely on the local optional metrics and the progress markers as described below.⁷⁶ While ODE will monitor changes to the required five common metrics that the LPGTs are based on, Oregon's smallest districts will not be required to provide any projections or forecasts of these measures.

LONGITUDINAL PERFORMANCE GROWTH TARGETS (LPGTS)

LPGTs, also referred to as "common metrics," are required in statute by the Student Investment Account but correspond to key improvement measures also outlined for the High School Success, Every Day Matters, CSI/TSI, and CTE. These five common metrics are identified in legislation and are described here. Grantees are welcome to develop and submit additional growth targets using the same or similar framework if it supports their local monitoring and evaluation efforts⁷⁷.

Extensive technical and conceptual guidance ([Appendix I: LPGT Development](#)) on setting LPGTs can be found in the appendices.

COMMON METRICS – LONGITUDINAL PERFORMANCE GROWTH TARGETS:

1. [Four-year Graduation](#): The percentage of students earning a regular or modified diploma within four years of entering high school.
2. [Five-year Completion](#): The percentage of students earning a regular, modified, extended or adult high school diploma, or a GED within five years of entering high school.
3. [Third Grade Reading](#): The percentage of students proficient on statewide English Language Arts (ELA) assessments in 3rd grade.
4. [Ninth Grade On-Track](#): The percentage of students earning at least one-quarter of their graduation credits by the end of the summer following their 9th grade year.
5. [Regular Attenders](#): The percentage of students attending more than 90 percent of their enrolled school days.

75 Link back to information on CTE Consortium

76 Small districts must still comply with all Perkins monitoring and reporting requirements as part of a CTE consortium.

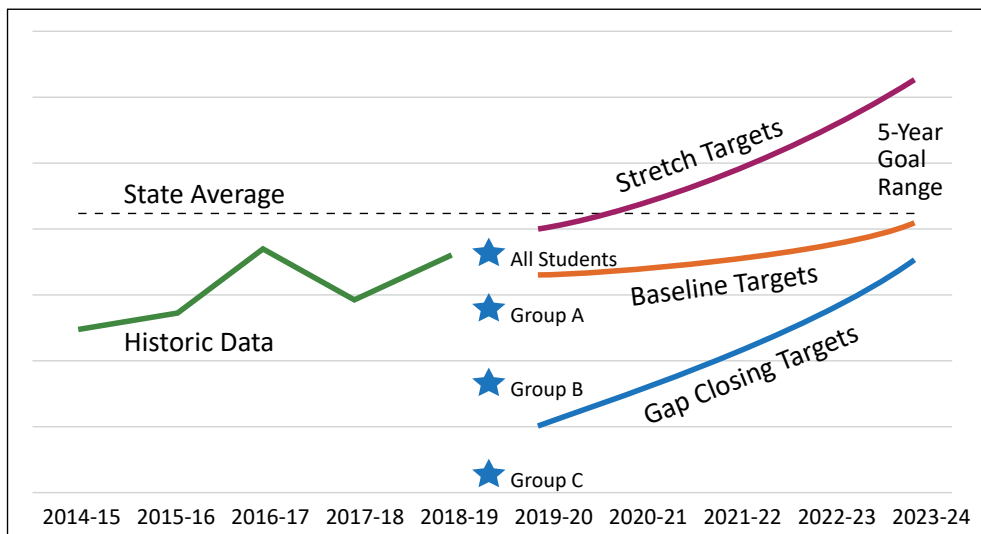
77 Remediation rates encourage using postschool outcomes and indicators such as FAFSA/ORSA Completion, college enrollment, remediation rates, college completion, and employment.

All of these common metrics are research-based indicators of the effectiveness and health of our educational system. Additionally, these metrics are influenced by what systems and schools do to target improvement. These metrics can be slow-moving, lagging measures that can be difficult to explicitly link to or be solely reflective of the allowable investments described in this guidance. **Some of these measures may have data quality impacts related to system responses to COVID-19.**

The Longitudinal Performance Growth Targets required by the [Student Success Act](#) can still provide a picture of key points of student progress and growth. They don't, however, show every aspect of student growth, cohort growth, or system improvement, nor are they intended to. It is important to acknowledge that several of the ways the funds and programs described in this integrated guidance can be used support corresponding changes in these metrics over time. It is also important to name that there are meaningful and allowable investments that could be pursued that would not directly or immediately correspond to changes in these metrics. This further supports attention to local optional metrics and progress markers alongside these growth targets.

A Visual of Longitudinal Performance Growth Targets

The graph below shows baseline and stretch targets for “all students” over five years along with a single, gap-closing target.



Recipients are asked to create baseline targets (the minimum growth they would be satisfied with) and stretch targets (a more ambitious but still realistic set of targets) for all students, as well as gap-closing targets (to monitor the reduction of academic disparities between groups of students) for focal student groups.

HIGH SCHOOL SUCCESS ELIGIBILITY REQUIREMENTS

Eligibility requirements for High School Success must remain fully in place. These were assessed in 2020-2021 and 2021-2022 and attention will be sustained to remedy where requirements are not in place at the established baseline. Now, the goal is to strive for continuous improvement and these requirements will continue to be revisited and monitored.

The requirements for eligibility, as outlined in [ORS 327.883](#) are:

1. Teacher Collaboration Time around Key Student Data
2. Practices to Reduce Chronic Absenteeism
3. Equitable Assignment of Students to Advanced Courses
4. Systems Ensuring On-Time Graduation, including for English Language Learners

Any new high schools will be assessed around eligibility implementation and will have a timeline to ensure that these requirements are fully put into place. See [Appendix I](#) for additional details on High School Success Eligibility Requirements.

INTEGRATING AND MEETING STATE CTE PERKINS V PERFORMANCE TARGETS

Under Perkins V, states are required to report annually on [core indicators of performance](#) for all students being served by CTE Programs of Study as well as by student population and career cluster. Schools report their CTE data through the CTE Information System, CTE Course Collection, and CTE Student Collection for approved programs no matter how these programs are funded. Oregon's state developed [CTE performance targets](#) can be found in the CTE State Plan. While the Perkins V framework offers less flexibility, the CTE Perkins targets and trajectories have still been set at reasonable but ambitious levels based on Oregon's history of high performance for CTE Concentrators⁷⁸.

Perkins targets, as required by federal law, were set at a statewide level using a public engagement process. Recipients are not responsible for creating their own targets; however, Perkins recipients and CTE consortia members will use data from the annual Perkins 90% Report and CTE data dashboard as part of the needs assessment process and to inform use of funds to meet student needs and maintain high program quality. As a federal program, Perkins V requires disaggregation of data to reveal any impact on different student groups. Data disaggregation is a best practice in research equity, and a core commitment of each of the initiatives covered in this integrated guidance. Oregon's statewide Perkins performance targets provide an opportunity for local education entities to identify gaps that may exist for students who have historically and are currently marginalized by educational systems. Each and every student can and should be engaged and benefit from participation in CTE Programs of Study and benefit from career education training.

CTE performance target monitoring can be used as a model for ways to track and monitor student opportunity and program quality for other school programs such as accelerated learning opportunities and summer programs.

Perkins recipients who don't meet 90% of the CTE performance targets are prioritized for support using performance improvement plans. The 90% threshold can be thought of as a buffer and warning indicator for schools to focus on improvements. The performance measures specified here may be chosen by districts as local optional metrics (see section on local optional metrics below). **Further integration of these target measures, and of Perkins with other initiatives, benefits students by centering authentic student experiences and learning, and by promoting deeper connections to communities. CTE targets can offer a model for ways applicants can shape and expand targets for all students even if only federally required for CTE concentrators.**

⁷⁸ The number of secondary CTE concentrators using the new definition will decrease by 45 to 55 percent but will also reflect students who have more intentional participation in CTE, in line with congressional intent.

CTE PERFORMANCE MEASURES

- Reading Attainment: The percentage of secondary CTE concentrators who demonstrate proficiency in reading/language arts as measured by the statewide assessment.
- Math Attainment: The percentage of secondary CTE concentrators who demonstrate proficiency in mathematics as measured by the statewide assessment.
- Science Attainment: The percentage of secondary CTE concentrators who demonstrate proficiency in science as measured by the statewide assessment.
- High School Graduation (4-year): The percentage of secondary CTE concentrators who graduate within four years.
- High School Graduation (Extended): The percentage of secondary CTE concentrators who graduate within five years.
- Postsecondary Placement: The percentage of CTE concentrators who, in the second quarter after exiting from secondary education, are in postsecondary education; are in advanced training, military service, or a service program; or are employed.
- Non-Traditional Participation: The percentage of CTE concentrators in CTE programs and Programs of Study that lead to fields that are non-traditional for the gender of the concentrator.
- Participated in Work-Based Learning: The percentage of CTE concentrators graduating from high school having participated in work-based learning.

Please Note: Specific CTE data [are available at this website](#) for school districts, community colleges and consortia in Oregon.

PROGRESS MARKERS

For each of the five common metrics, ODE is solidifying the use of *progress markers*. Progress Markers are sets of indicators, potential milestones, that identify the kinds of changes towards the outcomes expected and desired in action, attitude, practice, or policies over the next four years that can help lead applicants to reaching Longitudinal Performance Growth Targets and the four common goals.

Progress Markers are intended to support applicants and grantees to learn and attend to their changemaking efforts and to support understanding how specific activities/strategies are *contributing* to desired outcomes and targets. Progress Markers illuminate the depth and complexity of changes that advance over time. Moving from early and expected changes, towards likely changes; and extending all the way toward profound changes desired based on the efforts of grant recipients.

The theoretical underpinnings of progress marker development for ODE is informed by [Outcome Mapping](#)⁷⁹ - an approach to planning, monitoring and evaluation that puts people at the center, defines outcomes as changes in behavior, and helps measure contribution to complex change processes. ODE offers these progress markers to partner with applicants in determining and assessing where changes are occurring.

Recipients are not expected or required to meet all progress markers, only to track changes when the investments create or contribute to the changes outlined (as determined by the recipient). That's worth repeating. Reporting on progress markers is required under this guidance but attainment or accomplishing each marker is not expected or anticipated. Progress marker reporting is most helpful to grantees when they establish consistent ways to review what changes they are seeing in the implementation of their plans. ODE, under this guidance, requires progress marker updates be shared with ODE on a quarterly and annual basis.

The information provided from progress marker reporting will inform the technical assistance and coaching that ODE provides throughout the year. The information will also support ODE to keep the educational field, the public, and the legislature informed about the important kinds of progress being

79 Earl, S., Carden, F., & Smutylo, T. (2001). Outcome mapping: building learning and reflection into development programs. Ottawa: IDRC.

made with significant taxpayer investments that might not otherwise be illuminated as quickly by slower moving metrics. As described above, LPGTs represent metrics that applicants will be held accountable to with potential for state intervention if targets are not met over time. Progress Markers represent an avenue to track and learn how change-making is occurring, leading to system growth, effective engagement and instruction, and stronger student learning outcomes.

PROGRESS MARKER FRAMEWORK FOR 2023–2025

The following progress marker framework is put forward to provide a clear picture and preview of what progress markers will look like under this guidance from July 1, 2023 to June 30, 2025. This framework was developed through rounds of engagement with more than 30 leading experts in Oregon in each common metric, including practitioners and policy advocates with refinement from their optional use over the last two years.

These indicators will get additional engagement and input through workshops in the Spring and Fall of 2022 before being finalized.⁸⁰ They are offered here to support district planning and the general dimensions of what is covered are unlikely to change significantly.

It is also important to note that this framework would be stronger if there was a full slate of progress markers capturing the kinds of changes we'd expect to see for each common metric and even each common goal within the state ESSA plan. Out of respect for the current complexity of COVID response and keeping the commitment to only ask for the information that ODE is at capacity to monitor and use, this framework maintains a curated and integrated set of progress markers. Functionally, this means that progress markers work across the growth targets and common goals but ideally will, in their final form, reflect a meaningful effort to mark the kinds of changes we'd expect and hope to see happen as a result of these significant state investments.

EXPLAINING HOW PROGRESS IS MARKED

- **“Expect to see”** progress makers represent initial, easy to achieve changes that would likely occur in the first three to six months of implementation of the programs put forward in this integrated guidance.
- **“Would like to see”** progress markers represent the kinds of changes that would occur within six to eighteen months of implementation and indicate more significant changes in engagement and student and educator learning conditions.
- **“Would love to see”** progress markers describe the kinds of profound changes that would occur in the first 18-months to four-years of implementation. For many grantees, these markers of progress would be unusual to see in the first year of implementation under this guidance.

Individually, progress markers can be considered indicators of behavioral change, but their real strength rests in their utility as a set, as cumulatively they illustrate the complexity of the change process. This is something no single indicator can accomplish.

⁸⁰ For example, new performance standards for K-12 education accreditation have been released by Cognia in support of continuous improvement at <https://www.cognia.org/wp-content/uploads/2021/08/Performance-Standards.pdf> ODE will explore where further alignment is valuable.

2023–25 PROGRESS MARKERS

6 changes we <u>expect</u> to see:	6 changes we would <u>like</u> to see:	4 changes we would <u>love</u> to see:
Consistent community engagement recognizes and honors the strengths that educators, students and families bring to the educational experience and informs school and district planning.	Educators use student-centered approaches to foster student voice, reinforce student engagement and motivation, and increase academic achievement.	Financial stewardship is reflected in both accurate and transparent use of state and federal funds with integrity and purpose, while also centering student and community voices in resource allocation.
Equity tools are utilized in continuous improvement cycles, including the ongoing use of an equity lens or decision-tool that impacts policies, procedures and practices.	Dedicated time for professional learning and evaluation tools are in place to see if policies/procedures are adequately meeting the needs of students and address the root-causes of chronic absenteeism.	Educators experience a balanced approach to assessment systems that help them identify student learning in the areas of reading, writing, research, speaking, and listening that are clearly connected to Oregon’s English Language Arts and Literacy Standards.
Data teams are forming, and they frequently review data that inform a school’s decision-making processes, including barriers to engagement, attendance, contextual factors influencing the data, and participation and completion of experiences such as career exploration, CTE Programs of Study, Accelerated Learning courses and work-based learning experiences. ⁸¹	Comprehensive literacy strategies, including professional development plans for educators, are documented and communicated to staff, students (developmentally appropriate), and families.	Schools and districts have a process to identify and analyze the barriers that disconnect students from their educational goals and/or impede students from graduating on time ⁸² and/or transitioning to their next steps after high school.
Schools and districts have an inventory of literacy assessments, tools, and curriculum being used.	A review of 9th grade course scheduling is conducted, accounting for student core and support course placement, and disaggregated by student focal groups. ⁸³	Students have avenues to share and communicate their dreams and aspirations at all levels, including a clear picture of the contributions and next steps they plan to take after they graduate from high school.
Effective communication exists between educators and families about student growth, literacy trajectory, areas for improvement, and individualized supports are provided. This includes communication around graduation requirements and advanced courses, including CTE. ⁸⁴	Foundational learning practices are visible or emerging that ensure safe, brave, and welcoming classroom and school environments that are strengths-based, equity-centered, trauma-and SEL-informed. This means policies and practices exist that prioritize health, well-being, care, connection, and relationship building, and honor individuals’ ways of being and knowing through culturally affirming and sustaining practices for students, staff, and administrators. ⁸⁵	
Schools and districts co-develop and communicate a shared understanding (among educators, students, families and community members) of what it means to be on-track by the end of the 9th Grade. This includes evidence of increased enrollment in advanced courses as well as ensuring English Language Learners are enrolled in appropriate courses to ensure on-time graduation. ⁸⁶	Schools strengthen partnerships with active community organizations and partners, including local public health, mental health, colleges, workforce development boards, employers, faith communities, tribal leaders, and others.	

81 Providing sufficient time for teachers and staff of 9th grade students to review data is an eligibility requirement for High School Success (Measure 98) funding in high schools. This suggests the value of that practice when well designed for all developmental levels. Duplication in focus is acceptable and strategic in this case. Funds should be braided but grantees can’t use funding for the same purpose with both initiatives.

82 ODE considered and received substantial but mixed feedback about the value of mapping the math strategy, and while we chose not to include formally, SIA recipients are encouraged to review the literature and develop an understanding of what Math proficiency is, what it looks like for students and how shared competencies are taught in 9th grade Math.

83 Again, this is intentionally aligned with High School Success goals and best practices. Changes in progress that might come in part from SIA investments and in part from HSS investments are acceptable to include as “contributions to change” as what we are most interested in is that change is occurring and learning from what is unfolding.

84 Aligns to HSS requirements

85 Aligned with ODE’s [Integrated Model of Mental Health](#)

86 Aligns to HSS requirements

PARTNERS* CONTRIBUTE TO CHANGE

ODE understands, and our evaluation efforts must therefore include awareness of, the different people and roles that contribute to powerful systems change and improvement in student engagement and learning conditions. As grantees picture the work that will unfold and who will contribute to change, we recommend seeing and imagining all of the different people that will be involved in the effort. Below is a list that is not intended to be exhaustive, but to rather showcase the amount of diversity and roles successful implementation will take. Who will be essential to success in your system?

Educators	Business and Industry partners	Higher Education Coordinating Commission
Principals	Vocational Rehabilitation and Transition Specialists	Community college partners
Superintendents	Attendance officers / coordinators	University faculty (preservice program)
School board members	After School Providers	Pre-K and childcare providers
Instructional Coaches	School safety and prevention specialists	Early Learning Hubs
Instructional Assistants/ Paraprofessionals Curriculum and Instruction (district level)	Mental Health Teams	Non-profit/volunteer reading programs (e.g. SMART Readers)
9th grade on-track coaches	Counselors and guidance counselors	Educator Advancement Council
Special Education educators (K-12)	Community-based and culturally-specific organizations	STEM Hubs
School personnel	Psychologists, social workers, traditional health workers, and community-based mental health professionals	Researchers
Scheduling Administrators Parents and Families	Primary care providers	Legislators
Bus Drivers	Graduation coaches	Judicial representatives
CTE Regional Coordinators	Family resource liaisons	McKinney-Vento liaisons
CTE Student Leadership	ODE staff	Tribal/cultural/community leaders
Organization Representatives and Student Officers	ESD staff	DHS/child welfare
Local workforce development boards		Media
Local chamber of commerce		

*Grantees will be asked to describe in annual reports how partners like these have contributed to the changes they see within their implementation efforts.

LOCAL OPTIONAL METRICS

The next aspect of this overall evaluation framework are local optional metrics. So far, these have been an underutilized tool that both legislators and ODE believe offer schools and districts a meaningful opportunity to name and utilize metrics they find significant and to demonstrate how they are improving and meeting outcomes named in their planning on their own terms.

WHY DEVELOP LOCAL OPTIONAL METRICS?

1. State level measures can be valuable for state policy, state investments, and high-level interventions in district and school improvement but can never account for the local and immediate ways in which data and information can support actionable improvement.
2. Applicants can leverage this opportunity to name and create their own tools and ways to be reviewed by ODE in addition to the state-level frameworks.
3. With the passage of HB 2060 in the 2021 Session, grantees are encouraged to set optional metrics and growth targets that speak to student and school staff well-being and health -- something that aligns the purposes put forward in several of the programs but where there previously has not been a structural avenue to show meaningful progress and action on what is being accomplished over time.

CRITERIA FOR A LOCAL OPTIONAL METRIC

Local optional metrics should be measurable, valid, and reliable (i.e. measured in a consistent way each time new data are generated), and evidence-based. ODE recommends metrics with numeric, proportional measurements (such as percent of students experiencing..., student-counselor ratio, etc.), but other measures may be approved if there is good evidence that they are meaningful indicators of progress. For all but the smallest districts, local optional metrics referring to student experiences and outcomes should be collected in such a way that they can be examined by focal student populations as well as overall.

Local optional metrics should be measured at least annually in order to provide good feedback on the improvements being made under these programs. ODE

will consider metrics measured biennially if an interim measure is available in off-years (e.g. alternating student health survey results with a local climate survey). Metrics must be broadly representative of the students being served - when possible, they should aim to represent all students within a district, school or grade level. Metrics focusing on a specific focal student group may be approved in combination with broader-based metrics or when deemed appropriate for the specific challenges the district hopes to address under these initiatives.

An equity lens requires that metrics and related data should be considered, evaluated, and reported with significant consideration of individual and local context. This means asking not only what is occurring, but why. For example, if a certain proportion of students are missing school, it is essential to obtain qualitative information regarding the conditions, barriers or limitations that are interfering with attendance. Data collection may take the form of additional qualitative questions, or by asking a representative sample of respondents to assist with data interpretation. This level of inquiry is essential to creating a nuanced understanding of challenges and growth opportunities, and to ensuring that data collection and interpretation incorporate an equity lens.

Using optional metrics and local growth targets to support student mental and behavioral health

[HB2060](#) allows for targets to be established related to student mental and behavioral health needs, as established by the State Board of Education by rule. The State Board is anticipated to complete rule development in late Spring 2022. These are not required, but they do create an important avenue to align uses of state dollars to desired changes that traditional metrics might not capture.

It is recommended that mental and behavioral health-related metrics focus on systems level considerations rather than individual, static outcomes. Domains such as safety, belonging, school culture and climate, and access to quality mental health services and supports can help to identify needs, barriers, and growth opportunities.

APPLICANTS MAY CUSTOMIZE WITH OPTIONAL LOCAL METRICS AND ADDITIONAL PROGRESS MARKERS

Applicants are encouraged to put forward optional local metrics that may more accurately align to the particular strategies, activities and investments outlined in their integrated grant application and plan. Examples could include school climate surveys and/or surveys and assessments of student belonging.

Grantees are also welcome to put forward additional progress markers toward the common metrics based on the framework provided.

These measures will be solidified and agreed upon in setting the final grant agreement as part of the co-development process.

For example, where a district might be prioritizing investments in reading proficiency, they are welcomed and encouraged to consider a range of optional metrics in addition to the 3rd Grade Reading common metric. A district could add their own formative and interim assessment strategies and data along with assessments of Cognitive Academic Language Proficiency that might show measures of literacy in languages other than English or show a fuller student learning profile that they want to customize and use as part of their overall monitoring and evaluation framework.

QUARTERLY PROGRAMMATIC AND FINANCIAL REPORTING

Grantees are asked to report their financial and programmatic progress on a quarterly basis - more information describing the components of and process for completing that process follows.

REPORTING ON PROGRESS MARKERS

To track progress markers over time, ODE will further embed questions that mark progress into quarterly programmatic reports. ODE will provide additional technical assistance to support understanding of how this approach to monitoring and evaluation works. Once established, these progress markers will help ODE monitor and share back learning across the state and to the legislature. Progress Markers can be helpful at the immediate local level. They may also be used, eventually, to inform ODE considerations on requiring grantees to participate in the coaching programs and/or corrective action planning outlined in the next section of this guidance.

HOW IS PROGRESS REPORTED?

The reporting and monitoring framework for this integrated guidance has been designed to support the values named previously and our efforts to honor the many moving pieces that applicants are navigating while trying to offer a rigorous and robust reflection, learning, monitoring, and support structure. Progress for all applicants will be reported and monitored primarily through three methods:

1. Quarterly Programmatic and Financial Progress Reports
2. Annual Reports
3. Check-ins with ODE points of contact

QUARTERLY PROGRAMMATIC AND FINANCIAL PROGRESS REPORTING

Reporting for all six programs will be completed through one quarterly report submission, where recipients will detail their progress and spending on outcomes, strategies and activities of their integrated plan. Most likely recipients will submit their programmatic and financial reports via a Smartsheet dashboard, similar to what has been built for the SIA Reporting Dashboard in the 2021-23 biennium. Recipients will receive a link to their reporting dashboard and instructions via Smartsheet each fall prior to the first reporting deadline and additionally every quarter as a reminder one month before a quarterly progress report is due. A template and detailed guidance for these quarterly reports will be released to the field at a later date; however, grantees should be prepared to include the expenses for each programmatic funding stream for each budgeted activity (i.e. for each activity in the approved budget, state the amount spent from HSS funds, EIS funds, etc.).

Each quarter, grant recipients will be required to submit Progress Reports that include expenditure reports⁸⁷, status of activity implementation and journaling progress narrative responses. Once a year, an Annual Report submission will also be required which will include narrative responses and updates on progress markers which is outlined in more detail below.

CTE Regional Coordinators will have access to district quarterly reports to help inform regional work.

For the 2023-2024 School Year, the quarterly reports are due on the following dates:

Due Date	Reporting Period	Included in the Progress Report
October 31, 2023	Quarter 1 (July 1, 2023 - September 30, 2023)	Expenditure report; status of activity implementation; journaling progress questions ⁸⁸
January 31, 2024	Quarter 2 (October 1, 2023 - December 31, 2023)	Expenditure report; status of activity implementation; journaling progress questions AND Financial Audit and board minutes
April 30, 2024	Quarter 3 (January 1, 2024 - March 30, 2024)	Expenditure report; status of activity implementation; journaling progress questions
November 30, 2024 ⁸⁹	Quarter 4 (April 1, 2024 - September 30, 2024)	Expenditure report; status of activity implementation; journaling progress questions AND Annual Report narrative responses and status of meeting progress markers and local optional metrics

⁸⁷ Note: expenditure reports are separate from the financial claims process and occur on a different timeline than indicated in this table. More detail outlined below.

⁸⁸ What is included in the quarterly Progress Report is subject to change depending on Grant Agreement/Amendment approval from the Department of Justice.

⁸⁹ For any recipients who opt out of the SIA universal extension, the reporting period for Quarter 4 and Annual Report is April 1, 2024 - June 30, 2024. For any HSS recipient who requests a summer extension, the reporting period for Quarter 4 and Annual Report is April 1, 2024 - September 30, 2024. There are plans in place to work with the State Board of Education to request rule adjustments to this process to align HSS timelines with the SIA Universal Summer Extension timeline. Additional guidance will be coming on this piece before the Spring 2023 application window.

For the 2024-2025 School Year, the quarterly reports are due on the following dates:

Due Date	Reporting Period	Included in the Progress Report
October 31, 2024	Quarter 1 (July 1, 2024 - September 30, 2024)	Expenditure report; status of activity implementation; journaling progress questions
January 31, 2025	Quarter 2 (October 1, 2024 - December 31, 2024)	Expenditure report; status of activity implementation; journaling progress questions AND Financial Audit and board minutes
April 30, 2025	Quarter 3 (January 1, 2025 - March 30, 2025)	Expenditure report; status of activity implementation; journaling progress questions
November 30, 2025 ⁹⁰	Quarter 4 (April 1, 2025 - September 30, 2025)	Expenditure report ⁹¹ ; status of activity implementation; journaling progress questions AND Annual Report narrative responses and status of meeting progress markers and local optional metrics

ANNUAL REPORTING

ANNUAL PROGRESS REPORT

Several statutes and rules⁹² require grantees to complete a progress review on an annual basis for HSS, SIA, and EIS funding. The annual report will ask recipients to review their implementation efforts, progress with any local metrics that were established in the grant development process, review how their strategies worked (or didn't), and work with ODE to substantiate changes within progress markers.

ODE will develop the Annual Report⁹³ to ensure that recipients receiving these funds report on the necessary requirements for each program outlined in statute and rules. This includes but is not limited to:

1. Students' progress toward graduation beginning in grade 9, graduation rates, rates of college attendance and need for remedial classes in college;
2. Analysis of student attendance, including for students in grade 9 through 12;
3. Analysis of disciplinary referrals, suspensions and expulsions in grades 9 through 12, disaggregated by race and ethnicity, if using HSS funds for administrative costs; and
4. Progress towards meeting Longitudinal Performance Growth Targets.

⁹⁰ The November 30 deadline applies to all SIA recipients with the universal summer extension. For any recipients who opt out of the universal extension, the deadline for the Quarter 4 and Annual Report will be September 30 and the end of Quarter 4 reporting period will be June 30. Currently, HSS recipients have to request a summer extension. There are plans in place to work with the State Board of Education to make adjustments to this process to align with the SIA Universal Summer Extension timeline. Additional guidance will be coming on this piece before the spring 2023 application window.

⁹¹ For reimbursement grants final EGMS claims must be made by November 15 of the year after the grant is made.

⁹² The statutes and rules include: [ORS 327.892](#) (HSS), [ORS 327.889](#) (HSS), [OAR 581-013-0035](#) (HSS), [ORS 327.201](#) (SIA), and [OAR 581-017-0672](#) (EIS).

⁹³ The Annual Report for 2023-25 is still in development and will be shared once complete.

The annual report questions and guidance will be added to the recipient's Smartsheet dashboard prior to the fourth quarter reporting period each year. In addition to narrative responses that describe progress towards implementation efforts, grant recipients will also include a status update on progress markers to indicate where change may be starting in policies, practices and approaches over the next three years that we think would lead to applicants reaching their Longitudinal Performance Growth Targets⁹⁴.

The annual report serves as the review for this first year of integrated implementation. In order to complete the review, three steps need to be taken:

1. The annual report must be posted to the grantee's webpage⁹⁵;
2. The annual report must be presented at an open meeting with the opportunity for public comment (not a consent agenda item); and
3. The annual report must be approved by the governing board.

The annual report is a chance to pull back and reflect on the whole of what you've learned and any impact you are seeing. It's also an opportunity to share an update with your students, parents, and community.

ANNUAL PERKINS MONITORING

Under section 211 of the Strengthening Career and Technical Education for the 21st Century Act (Perkins V), and section 200.329 of the Education Department General Administrative Regulations (EDGAR), ODE and the Higher Education Coordinating Commission (HECC) are required to monitor eligible recipients and their sub-recipients annually for the purposes of:

- Assuring that Perkins V funds have been expended appropriately to meet the intent of the legislation and in compliance with federal and state laws, regulations, and policies;
- Reviewing and verifying accurate data collection;
- Analyzing, identifying, and changing policies and activities that hinder quality program development and student achievement; and
- Ensuring that equal educational opportunities are provided to all students, including full opportunity to participate in programs, activities, and career opportunities, and to benefit from services

Reviewers look at the following elements:

- Local budget management (allocability, supplement vs supplant, professional development and administrative caps, inventory)
- Equity (disaggregated data review and a system to identify discrepancies and determine root cause analysis, MOA findings)
- Perkins leadership and staff
- Program performance indicators (including the attainment of postsecondary CTE credits and credentials)
- Late, substandard, or inaccurate submissions (data, grant application, grant reports, program of study applications, renewals, and updates)

94 Note: this change was captured as a dropdown menu (with options for no change, low, medium, or high) in the SIA Annual Report for 2020-21, but reporting may evolve in the coming biennium.

95 There is not required format for recipients when presenting their annual report questions and response to the community and board. Grantees may post the annual report questions and response in a slide deck, downloaded from Smartsheet, or in any other format that is accessible to the community and board. Recipients can satisfy the annual report approval requirement by providing ODE with the board meeting minutes and URL showing where the annual report questions and responses are posted.

ANNUAL AUDIT (SIA FUNDS ONLY)

All districts are required to submit an annual Financial Audit to ODE; however, only those grant recipients of SIA funding will be required to submit an annual financial audit. Under Section 15 of the Act, SIA recipients are required to conduct a financial audit in accordance with the Municipal Audit Law⁹⁶, which includes consideration of SIA compliance and reporting. The audit is structurally designed to be embedded in the school district or eligible charter school's annual financial audit, and is similar to work performed for the State School Fund (e.g. considering high-risk areas such as ADM, Transportation Grant and others)⁹⁷. To assist with audit planning, ODE has published [Financial Audit Guidance](#) and [Suggested Audit Procedures](#).

The annual financial audit for SIA must be:

- Made available at the main office of the grant recipient and on the grant recipient's webpage;
- Presented to the governing body of the grant recipient at an open meeting with the opportunity for public comment on the results; and
- A copy of the financial audit and board meeting minutes will need to be forwarded to ODE.

Also specific to SIA funding, ODE is required by law to establish a procedure and conduct performance and financial audits on a random basis, or based on just cause, with rules adopted by the State Board of Education. In June 2021, the State Board of Education adopted the [Just Cause and Random Audit Process rules](#).

PERFORMANCE REVIEWS

[Performance Review Standards rules](#) have also been set by the State Board of Education and are required of SIA grantees every four years. The first SIA Performance Reviews will be completed by December 31, 2023 (covering the initial three-years of plan execution). [ORS 327.892](#) provides similar authority for review of performance and use of High School Success funds. ODE will be developing the process and procedure for an integrated review of performance under this guidance with an anticipated review occurring no later than December 31, 2027.



⁹⁶ https://oregon.public.law/statutes/ors_297.405

⁹⁷ The discretion and levels of testing and materiality remain with the auditors

SECTION 7: GETTING BETTER: SUPPORT AND IMPROVEMENT OPPORTUNITIES AND EXPECTATIONS



**OREGON
DEPARTMENT OF
EDUCATION**

SECTION 7: GETTING BETTER: SUPPORT AND IMPROVEMENT OPPORTUNITIES AND EXPECTATIONS

Section Snapshot

The guidance below outlines the continuum of resources and activities that will be available over the course of the upcoming biennium to support the planning, implementation, monitoring, and evaluation of the six integrated programs. Included is an overview of the calendar, the process for accessing offerings, as well as several example offerings. The last portion of this section describes the process for instances where a school or district does not meet requirements or intervention is required in implementation.

CONTINUUM OF SUPPORTS AND IMPROVEMENT OPPORTUNITIES

Improving and strengthening educational offerings often works best when effort is mutual and the focus is shared. **All districts and schools can make use of these supports and improvement opportunities across all programs.** ODE is a state educational agency and holds a range of responsibilities and expectations to support innovation and improvement. ODE aims to meet its obligations through the following continuum of offerings:



TECHNICAL ASSISTANCE (TA)

- Technical assistance is consultative or focused support involving communication between ODE or ESD specialists or consultants with specific needs or problems.
 - All districts and schools have general access to technical assistance from ODE, which may be coordinated between Education Service Districts (ESDs) through the regional support model.
 - All districts and schools have general access to CTE technical assistance from ODE, and/or their CTE Regional Coordinator.
- Technical assistance will be responsive to the timing and specific needs of a given inquiry. TA is generally short-term, technical, or more narrow in focus.
 - TA can happen on any aspect of implementing the guidance in this document - ranging from using a given tool to improving district planning efforts to site-visits.
 - Examples of technical assistance support include individualized phone calls, review and feedback meetings, email, online meetings and is also available through resources posted on the office website.

PROFESSIONAL DEVELOPMENT

- Professional development opportunities are learning opportunities. They can be regional or statewide. They are likely to elevate critical topics in system change strategies, leadership for equity, and knowledge for all Oregon educators and leaders, while considering the unique contexts of districts across the state.
- A sustained series of professional development workshops could be considered coaching (see below).
- ODE often partners with other organizations offering professional development workshops or conferences (i.e. COSA, OSBA, OASBO, OEA, etc).
- ODE also generates short-term professional learning opportunities to be responsive to field needs.
- Examples of Professional Development include CTE/ Perkins Boot Camp, CTE Lunch & Learns, and the Student Success & System Change Learning Series, as well as learning offered through the Educator Advancement Council and Regional Educator Networks.

COACHING

- Coaching is defined as sustained learning programs where relationships are established to advance a definitive aim or outcome. Coaching programs can be invitational or required. Coaching programs can vary in scale, scope, or timing.



- In developing coaching offerings, ODE will take into consideration the input from districts and schools regarding topics and skills that would most benefit implementation of program plans. Additionally, analysis of program progress reports and growth target data will contribute to the determination of coaching focus areas.
- Examples of ODE coaching programs include:
 - Work being done to develop the *Intervention and Strengthening Program*. Established with SIA resources, this includes two new learning series focused on a) Equitable Systems, Mindsets and Practices and b) Community Engagement Systems and Practices. Both will be made available in 2022 and will be available to all grantees; while over time, some may be required to participate.
 - The CTE Regional Leadership Academy is for new CTE Perkins Reserve Grant Coordinators with less than 24 months of experience. The purpose of the Leadership Academy is to work with participants to develop a deeper understanding of their role and to further develop the skills necessary to lead the regional CTE collaboration and improvement efforts.

CORRECTIVE ACTION

- Corrective Action is the terminology used when ODE determines and communicates requirements or actions that must be completed over time in order to maintain funding eligibility. This involves ODE using statutory authority to state what actions are needed to be in compliance with state or federal law.
- ODE understands that holding compliance responsibilities with integrity means providing clear expectations, offering excellent support, and being thoughtful about what remedies are required to have the most positive impact on students, educators, and communities.
- Corrective Action is typically the result of not meeting eligibility requirements, performance growth targets, a complaint or monitoring process such as a MOA/Civil Rights visit, or other onsite or desk monitoring.

TEAMS IN PLACE TO SUPPORT INNOVATION AND IMPROVEMENT ACROSS THE CONTINUUM

The successful implementation of this integrated program guidance is supported by a coordinated staff of state, regional, local, and contracted staff. **All districts and schools can make use of these supports.** As it relates to this guidance, please use the following chart to track contacts at ESDs and ODE who are supporting general TA, professional development, and coaching resources:

Support Roles	Position Definition	Types of Support Provided	Initiatives these support members serve
ESD Liaisons	ESD Liaisons will support the full process of application, implementation, and evaluation for these initiatives. They hold a deep understanding of their service districts and local contexts.	<ul style="list-style-type: none"> Technical Assistance Professional Development Regional Networking 	<ul style="list-style-type: none"> HSS SIA CIP CTE EDM EIIS
ODE Regional Support Staff and Grant Managers	ODE Regional Support Staff will support schools and districts within a specific region with all aspects of the integrated programs and budget planning, application, and implementation. These generalists will learn deeply about the context and nuance of the schools and districts they serve and will work often in collaboration with ESD Liaisons.	<ul style="list-style-type: none"> Technical Assistance Professional Development Regional Networking 	<ul style="list-style-type: none"> HSS SIA CIP CTE EDM EIIS
CTE Regional Coordinators	CTE Regional Coordinators CTE Regional Coordinators are employees of ESDs, Community Colleges and School Districts. RCs are experts in all things CTE. They lead regional consortia implementing CTE Programs of Study. Please see more information below.	<ul style="list-style-type: none"> Technical Assistance Professional Development Regional Networking 	<ul style="list-style-type: none"> HSS CTE
ODE Program Staff, including CTE Subject Area Experts	ODE staff within EII or CTE with expertise on specific, technical, components of each initiative. These staff members are the resident “experts” on their specific program or subject area.	<ul style="list-style-type: none"> Technical Assistance Professional Development Regional Networking Grant Writing Program Development and Assessment 	<ul style="list-style-type: none"> HSS SIA CIP CTE EDM EIIS
External Contractors	Partners from outside organizations that ODE contracts with. They typically are contracted to provide specific expertise or skill sets.	<ul style="list-style-type: none"> Professional Development Coaching 	Potentially All Programs Outlined within this Guidance

To find out who serves in these roles for your district, consortium, charter, or program please refer to the ODE website. As program integration moves forward, additional contact directories will be posted or linked.

ROLE OF EDUCATION SERVICE DISTRICTS AND ESD LIAISONS

Each Education Service District (ESD) has identified staff members and/or contractors who are allocating at least a combined 1.0 FTE towards the role and function of being a Liaison working across the programs outlined in this guidance. Liaisons and each ESD team offer a helpful, regional primary point of contact and can support collaboration with ODE.

ESD Liaisons are consistently participating in planned ODE virtual and in-person meetings. In addition, ESD Liaisons participate in equity training and communicate regularly via email and phone with staff working in EII and on CTE. Through implementation of this guidance, the aim is to closely align the work of the ESD Liaison and the CTE Regional Coordinators in the spirit of system alignment and improvement.

A common set of attributes have been established for the Liaison role. Each ESD has flexibility in how they meet the aims of liaison roles based on established grant agreements and amendments. Below is a sampling of the kinds of roles liaisons or their teams would likely fulfill:

- Support districts with authentic community engagement, using the [Community Engagement Toolkit](#) as a resource.
- Develop or support the use of surveys and other engagement tools, including communication and translation support as useful.
- Support school districts with incorporating engagement feedback into the planning processes, including developing connections between the engagement, needs assessment, Continuous Improvement Plan (CIP) process, review of the QEM and statewide student success plans.
- Assist districts in their integrated application development and documentation.
- In individual and/or group meetings, lead or assist the district in documenting their needs, growth targets, attainable outcomes, investment strategies and accountability metrics.
- Work closely with ODE to deliver this technical assistance to districts. This will require regular meetings and phone consultation with ODE staff to obtain resources and promising practice knowledge.
- Support districts with the use of equity-based tools for decision making.

ROLE OF THE CTE REGIONAL COORDINATORS (RCS)

CTE Regional Coordinators are employees of ESDs, Community Colleges and School Districts and are funded through the Perkins federal funds and/or local dollars. RCs are experts in all things CTE and have established relationships with local employers and community colleges and lead regional discussions on preparing students for next steps after high school. CTE Regional Coordinators have their finger on the pulse of labor market/jobs information, as well as Perkins Performance metrics for schools and regions. Below is a sampling of the kinds of roles RCs would likely fulfill:

- Fiscal management of Perkins funds and navigation of federal Perkins requirements
- CTE Program of Study development and assessment
- Recruitment, licensing, and retention of CTE teachers
 - Coordination of regional professional development
- Advocacy and relationship building with Community Colleges and Business and Industry partners
 - Postsecondary Program alignment and articulation (Dual Credit / Accelerated Learning)
 - Creation and tracking of Work Based Learning Experiences
- Support Districts in the interpretation of CTE Data
 - Perkins Performance Targets
 - Labor market results and workforce needs
- Assist Districts in serving as the Gatekeeper for additional funding streams dependent on CTE such as HSS
- Leadership of the CTE Consortia
 - [Example of Consortia convening](#)
- Additional CTE related coaching and consultation

PROFESSIONAL DEVELOPMENT AND COACHING OPPORTUNITIES ON THE HORIZON

A. INTERVENTION AND STRENGTHENING PROGRAM (ISP)

ODE is creating a robust series of learning opportunities and coaching supports. Many will be asynchronous offerings available at all times. The first series of learning opportunities, including the “Equitable Systems, Mindsets and Practices” and “Community Engagement Systems and Practices” modules, will be accessible to any school or district in Oregon and available in 2022. Facilitated versions of some modules may also be available for some grantees, especially in cases where participation is required.

In addition to the development of the learning opportunities mentioned above, the Intervention and Strengthening Program will also offer extended coaching services. At this time, ODE plans to build additional coaching resources and services in several focal areas, and may include additional focal areas should the need and interest arise. The coaching supports will include an opportunity for grantees and contractors to co-develop their coaching plan, including a scope and sequence and expected outcomes, before the work begins. At this time the coaching focal areas include:

- **Equitable Mindsets, Systems & Practices** - Coaching for additional in-school or district support for grantees that have already participated in the Equitable Systems, Mindsets and Practices learning series. Participating grantees will partner with their selected ODE-approved contractor/vendor to enhance and bring alive the learning embedded within this equity series.
- **Community Engagement Systems and Practices** - Coaching for additional in-school and district support for grantees that have already participated in the Community Engagement Systems Practices learning series. Participating grantees will partner with the ODE-approved contractor/vendor to enhance and bring alive the learning embedded within the community engagement series.

- **Integrated Model of Mental Health** - Participating grantees will partner with the ODE-approved contractor/vendor to develop and implement mental health services and supports that align with ODE’s Integrated Model of Mental Health. Embedded focus points will include multi-leveled prevention and intervention systems that integrate trauma- and SEL-informed, strengths-based, equity-centered, culturally-responsive principles and practices for all students (especially for focal student groups) and staff.
- **Early Literacy** - Participating grantees will partner with the ODE-approved contractor/vendor to systematize their early literacy program, including attention to materials, instruction and assessment to improve practices and outcomes for all students and especially for focal student groups.
- **Financial Stewardship** - Participating grantees will partner with the ODE-approved contractor/vendor to address systems around equitable, student-centered and community- or need-driven resource allocation, budgeting drivers, principles and practices associated with federal and state education funds, blending and braiding funds, and resource mapping and matching.

B. STUDENT SUCCESS & SYSTEM CHANGE LEARNING SERIES

This learning series provides foundational understanding of the components of a high-quality Early Indicator and Intervention System, as well as engagement with district and school leaders to develop a plan for EIS implementation.

Learning series participants will establish and develop common understanding of the elements of an Early Indicator and Intervention System through study and review of relevant EIS practices and resources and build a knowledge base of current research of various EIS models. Additionally, participants will explore student data using equity-centered data inquiry protocol, develop common equity-centered data inquiry strategies, and develop fluency in use of specific data dashboard software or data systems.

Participants will build upon this learning to identify areas of focus for individual district and school EIS implementation plans, reflect on current district and school strengths, identify areas for development and in

need of support, and identify potential areas of focus for professional learning and coaching in the school and district. This learning series will also provide the opportunity to develop group facilitation skills and to develop equity focused group norms.

Essential Questions

- How is an Early Indicator and Intervention System a catalyst for equity and student learning?
- How will we use equity-centered student data practices to interrupt structural inequities in schools?
- How will EIS implementation strengthen partnerships with students, families, communities, and tribes?
- What specific and powerful leadership practices are needed to build EIS teams in schools and districts?
- How will we use EIS as a high-leverage strategy?



OUTLINING CORRECTIVE ACTIONS AND WAYS TO MEET COMPLIANCE CHALLENGES

Collaboration with educators and partners is central to ODE’s mission to foster equity and excellence for every learner. ODE is committed to learning alongside school districts and charter schools to support building capacity for program implementation, school system improvement, and supporting all learners.

Additionally, ODE is guided by the values of accountability and integrity, which undergird ODE’s responsibility to ensure that grant recipients meet expected performance targets, eligibility qualification, and legal requirements. **Within the scope of this guidance and the initiative covered, ODE will intervene to ensure that compliance is achieved when a grant recipient does not meet specific requirements or outcomes, including, but not limited to:**

- Longitudinal Performance Growth Targets;
- At least 90% of the Perkins performance targets at the consortia or direct grant recipient level;
- Eligibility requirements;
- Application alignment with available performance and demographic data;
- Misuse of or inadequate reporting of finances;
- Community engagement priorities; and/or
- observing all civil rights laws.

An applicant’s progress toward targets may be sporadic, or subject to unexpected changes in circumstances. To that end, a grant recipient may submit an explanation for the reasons why the areas were not met. In response, ODE will respond with an invitation to engage in developing a plan for improvement and monitoring, taking into consideration the explanation submitted by the grant recipient.

Of note, a Perkins recipient that fails to meet the performance targets will be required to include an improvement plan as described below, noting that consortia members will be accountable for performance targets at the consortia level.

Corrective actions plans are improvement plans that outline specific actions that must be taken and outcomes that must be met. Plans will be developed to address the areas that need improvement and will draw upon a continuum of interventions, as outlined below.

1. Implement a written plan identifying specific interventions and corrective actions, a timeline for improvement, and a monitoring plan.
 - a. Example - Provide specific technical assistance on identifying unlawful discrimination and development of remedies for, and prevention of, discrimination. Monitor implementation learning within district activities.
2. Require the grant recipient to enter into a coaching program.
 - a. Example - District is required to participate in the Intervention and Strengthening Coaching Program to increase knowledge about equitable systems and improve district and school systems, strategies, and actions related to equitable education.
 - b. Example - Assist the applicant to improve and correct interpretation of data, program alignment and design within Perkins application.
3. Conduct a compliance review and/or investigation of unlawful actions.
 - a. Respond to a discrimination or civil rights complaint related to grant expenditures or program implementation.
4. Direct the expenditure of grant funds.
 - a. Example - Restrict district to specific expenditure areas in order to direct impact toward areas in need of improvement.
5. Withhold grant funds until all requirements are fully in place.

[ORS 327.201](#), [OAR 581-013-0020](#), and [section 123 \(a\) \(5\)\(b\)\(3\) and 4\(a\)\(i\)\(ii\) of Perkins V](#) provide ODE the ability to restrict the expenditure of grant funds as the strongest form of intervention within this program.

LOOKING FORWARD

All districts and schools can access and engage in the learning, support, and improvement opportunities across all programs included in this guidance. ODE can always use your input to make this process more efficient and effective, and to reflect the interests and needs of schools and districts across Oregon. Send your ideas to ODE.EI@ode.oregon.gov.

INTEGRATED GUIDANCE FOR SIX ODE INITIATIVES: APPENDICES



OREGON
DEPARTMENT OF
EDUCATION

APPENDIX A: COMMUNITY ENGAGEMENT TOOLKIT

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FOREWORD: BUILDING ON A YEAR OF LEARNING AND LOOKING AHEAD



The initial Student Investment Account Community Engagement Toolkit was released by the Oregon Department of Education (ODE) on August 21, 2019. Since then, much has changed in the state, however the core promise of the SIA has not. Significant work done by districts and eligible charter schools to engage, listen, and plan with students, families, communities, and educators was and remains real and noteworthy. This is evidenced by the hundreds of engagement artifacts submitted in the first round of SIA applications that tell powerful and authentic engagement stories, and highlight lessons learned from across Oregon. The work of the SIA does not live in isolation of the economic, health, and community conditions across Oregon. The resilience and strength of communities and schools is something to notice and cheer on. And the opportunities to deepen partnerships, beyond the SIA, while addressing the challenges brought on by systemic racism, poverty, COVID-19, wildfires, loss of power, and the hundreds of ways we struggle to respond to the wholeness of students, families, educators, and school leaders are clear, complex and daunting.

At the same time, CTE was incorporating new legislative requirements for community engagement through the Perkins investments. Local and regional applicants for Perkins funds were engaging with similar student, community, employer and agency groups to gauge strengths, needs and to identify priorities.

This revised community engagement resource is being offered at this critical time as applicants continue to engage with students, families, and communities in

new ways and to support ongoing engagement as ongoing engagement as districts and schools begin to prepare to submit an integrated plan and budget. While this resource is primarily focused on community engagement, the larger framework and timelines of the Aligning for Student Success guidance are available on ODE's EII webpage. This resource is aimed to honor the learning and work of the prior two years, provide information that deepens the community engagement work called forward by the SIA and CTE, and offer useful and compelling tools to integrate community engagement work across other kinds of programs and initiatives - embedding this work in the fabric of districts and schools. This new toolkit is intended to support community engagement in both integrated plan creation and implementation. We cheer on bold new strategies and approaches that weave community engagement into the everyday operations of applicants, not just plan development and approval. And as we navigate unprecedented systemic challenges, we wish to emphasize that ongoing and robust community engagement is vital to supporting the mental and behavioral health of focal student groups struggling the most.

In Section 1, we re-ground the core intentions meaningful and authentic community engagement and use of an equity lens. We share about the significance and requirements in honoring the sovereignty of tribal nations in the process. And we describe a picture of robust community engagement that builds on the successes of the prior years engagement and planning.

In Section 2, we introduce a framework for deepening and expanding the thinking around community engagement, especially essential as community engagement is required for the six programs aligning under the integrated plan. This spectrum is adapted from a powerful resource and tool developed by Facilitating Power and the Movement Strategy Center¹, and is a key framework for how ODE’s teams will think about and support community engagement moving forward. Section 3 builds on this framework by sharing key strategies and tools that applicants could immediately consider to move ahead in family-district partnerships. Lastly, we include an Appendix with additional resources. Our offices operate through a network of brilliant and committed organizations, change-makers, and leaders who are all shaping the future of educational equity in Oregon. We wish to highlight the resources that have informed our thinking and can support applicants to deepen community engagement in their part of Oregon.

As you review this work, we suggest the following steps to get started:

1. **Begin with your own Self-Reflection on Previous Engagement.** Prior to planning new engagement opportunities or implementing new engagement strategies this year, applicants should take time to reflect on previous engagement efforts. This was an element of the SIA and CTE applications and contains rich and candid assessments for improvement. ODE offers some ways recipients could consider taking stock of their engagement efforts today to help inform their engagement moving forward.
2. **Get clear on your core engagement team.** If your district is small, your community engagement efforts might include a small number of individuals who plan for and lead the process. In larger districts, dedicated teams or positions may drive the planning for and implementation of

engagement efforts.

Either way, it’s important to set clear expectations for all staff, students, and families. This is especially true for groups who have historically had limited opportunity to engage. Create avenues for them to share their experiences, insights and ideas for improving your educational system. Viewing community engagement as an ongoing process as opposed to an event (or a state requirement) is essential. The time, energy, and effort that community members from focal groups dedicate is significant and generous, and provides valuable input to formulate the integrated plan.

3. **Establish or revise and affirm your approach.** Consider establishing your approach to community engagement from the outset, or if you already have robust processes in place, use this time and resource to undertake a comprehensive review. This includes creating clear expectations about the importance and goals of engagement, which include but are not limited to receiving input for the integrated plan. What follows in this document are resources and tools to contribute to and support your efforts.



1 Facilitating Power, “[Spectrum of Family & Community Engagement for Educational Equity](#)”

SECTION 1: FROM WHAT'S REQUIRED TO WHAT'S ROBUST



1.1 Community Engagement Requirements and Recommendations

The Student Success Act (SSA) requires applicants receiving SIA funds to engage students of color; students with disabilities; emerging bilingual students; students navigating poverty, homelessness, and foster care; other students who have historically experienced academic disparities; the families of students in these focal groups; and staff.

ODE requires² a more robust list of people and organizations to engage with for a more rigorous and intentional process, which includes but is not limited to:

- Community-based organizations (CBOs)
- Community leaders
- Tribal members
- Faith-based organizations
- Licensed and classified staff
- Early learning advocates and providers
- CTE Regional Coordinators
- ESD Regional Liaisons
- School volunteers, including PTAs, PTOs, parent clubs, site councils, and boosters
- School board members
- Community College and Higher Education leaders and instructors
- Before and after school child care providers
- Employers and business partners
- State or local workforce development board representatives
- Focal group students and parents
- Representatives from agencies serving at risk, homeless, out of school youth and adults, foster youth, military families, disability services
- STEM Hub and Regional Educator Network representatives

² ODE is currently in the rule-making process to add additional focal student groups that would be required to be engaged as part of the plan development process. The rules are anticipated to be adopted by the State Board of Education in April 2022

1.2 Applying an Equity Lens

An equity lens is a tool that helps center core values, commitments, and questions throughout the process. Applying an equity lens helps create a systematic structure and process to ensure that no focal group or community is ignored in the process of community engagement and plan development. The adoption and use of an equity lens is a requirement of the integrated application. You could begin by reviewing the [Oregon Equity Lens](#) and [Decision Tools](#) to help ground your team in the baseline assumptions, expectations, and aims of your own equity lens. You may also consider sharing your equity lens broadly with your community, so they are aware of how that tool will be used in your decision-making process. We would encourage you to expand on the Oregon Equity Lens so that it is attuned and situated to your own unique needs. In the sections below, we offer recommendations for reaching out and listening to your community and target focal student groups. However in your equity lens, you might consider specific values, objectives, and essential questions that you wish to guide your outreach. These questions might be:

- Who are the racial/ethnic and underserved groups affected? What is the potential impact of the resource allocation and strategic investment to these groups? How does belonging to more than one focal group affect their experience?
- Does the decision made ignore or worsen existing disparities or produce unintended consequences? What is the impact on eliminating the opportunity gap?

- How have you intentionally involved community partners who are also members of the communities affected by the strategic investment or resource allocation? How do you validate your assessment in the questions above?
- How will you modify or enhance your strategies to ensure each learner's and community's individual and cultural needs are met?
- How are you communicating with and addressing communities and groups that are *not* in the target focal group populations? If challenging or tense dynamics emerge, how will you navigate these?

Additionally, thinking about how to address potential challenges or tensions that exist in the larger community (beyond target focal groups) could be supportive in developing and applying your equity lens. If all community members understand the importance of equity, deeper and more courageous conversation could be made possible. Developing a strong and situated equity lens is a solid starting point to create conditions for meaningful and authentic community engagement.

1.3 Honoring Sovereignty, Tribal Engagement and Tribal Consultation

Sovereignty

Tribes are sovereign governments. Sovereignty describes the inherent right of Native American Nations to exercise self-governance³. Tribes interact independently in Government-to-Government relationships with other tribes, the federal government, states, and counties. Tribes also interact with school districts, cities, municipalities, businesses, non-profits, higher education institutions, and other non-governmental organizations. While not all tribes choose to exercise all powers as a sovereign government, the right to self-govern is inherent to tribes.

Tribal Consultation

The integrated plan development requires applicants to engage with their American Indian/Alaska Native students and families, and tribal and community members. In addition to concerted efforts for authentic dialogue with individuals or groups representing the American Indian/Alaska Native community, we strongly encourage applicants to utilize the formal tribal engagement process with the tribes located in the area to inform any integrated planning activities and priorities that would impact students of those tribes.

Tribal Consultation is a formal process designed to ensure timely and meaningful consultation on issues affecting American Indian and Alaska Native students. The consultation must be done in such a manner and in such a time that provides the opportunity for appropriate officials from Indian tribes or tribal governments to meaningfully and substantially contribute to plans served under covered programs. Under federal ESSA law, however, official Tribal Consultation is required in Oregon districts that receive greater than \$40,000 in Title VI funding or have 50% or more American Indian/Alaska Native students. The mandatory programs include parts of Title I, Title II, Title IV, Title V and VI. The recently released Tribal Consultation Toolkit Guide 1.0 and webinar recording by the Office of Indian Education provides essential information⁴.

³ For more information, see [SB13 Tribal History Shared History, Essential Understanding 2: Sovereignty](#)

⁴ [Tribal consultation toolkit](#).

1.4 Towards a Robust Community Engagement

We support applicants to increasingly see communities as fundamental actors and resources in schools and the education system. Deepening and sustaining a more robust community engagement beyond the minimum statutory requirements is necessary to fully realize the core goals and strategies in integrated plans. Moving from a minimum requirement to a robust community engagement framework and way of doing business is a growth process that takes time, effort, intentionality, and commitment to learning and accountability. However, seeding and activating a more robust community engagement plan will also create the possibility for lasting change and resilience for all students, families, teachers and staff.

Above, we shared the list of groups that applicants are required to engage with as part of the development of their integrated plans. Robust community engagement involves an even wider network of actors, participants, and partners, including (but not limited to) community-based organizations, faith-based institutions, grassroots networks, informal family networks and neighborhoods. Every applicant is required to use an equity lens to review their strategic integrated plan, which is required to be informed by the applicant's community engagement. This is meant to help center core values, commitments, and questions throughout the process, as well as create a systematic structure to ensure that no focal group or community is ignored in the process of community engagement and plan development. Since no city, town, or region of Oregon is the same, we would recommend beginning with the [Oregon Equity Lens](#) and expanding on it so that it is situated to your unique leadership needs, culture, and community make-up. What additional questions, needs, and considerations would help you learn more and grow into robust community engagement?

In this toolkit, we share a framework, example strategies, and helpful resources for expanding into a more robust and rigorous community engagement. As you choose to approach community engagement in deeper ways, **you are inviting change to happen**: focal groups will feel less

like an audience for your decisions and more involved as key partners; structures of accountability and feedback will bring a sense of transparency and authenticity to integrated planning; and core assumptions that you hold about how your district or school should operate may be transformed. Furthermore, investing in robust community engagement may also shift the minds and hearts of all staff and community members, even those who hold dominant identities. This work is meant to bring about greater health across the whole community and education system -- shifting dominant patterns and beliefs so all communities and families are in healthy relationship with each other.

Small and/or rural school districts may consider innovative ways to meet the call of robust engagement with their communities, especially if safety of students and families of focal groups is a concern. Some ideas for engagement include:

- Connecting with a leader who and/or community-based organization that is willing to speak with students they have a relationship with and share back what they learn with the school district
- Asking for input during other times when parents or families are at the school, such as during IEP meetings
- Conducting phone calls to students' families, rather than having an in-person event

SECTION 2: EXPANDING THE THINKING AND PRACTICE OF COMMUNITY ENGAGEMENT



Community engagement is a broad term encompassing a number of approaches to authentically and meaningfully engage communities in school, district and regional processes. To expand and deepen the nuance of this term, we have adapted work from Facilitating Power and the Movement Strategy Center to develop a spectrum for thinking about different ways to engage communities. This spectrum describes six different levels of community engagement with key considerations and ways to move deeper along the spectrum. It is important to note, with the exception of Level 0 “Ignoring Community,” that each level may be appropriate for a particular situation. The spectrum is intended to share what some pitfalls of each level are and ways to address those. You may need to consult this spectrum with another resource (like the [ODE Decision Tools](#) for SY20-21) to decide which level of the community engagement spectrum is appropriate for each strategy, activity, and choice you make.

2.1 The Community Engagement Spectrum

This framework serves as a tool to assess and deepen engagement in Oregon communities. It is organized on a spectrum of shallow to robust community engagement (Levels 1-5). Applicants are encouraged to use this framework to reflect on their stance and approach towards communities. It may be used to assess the *overall* level of engagement of an applicant, as well as be used to assess an individual strategy, activity, project, or initiative within a district or school. In most cases, an applicant will have multiple levels of this spectrum that exist simultaneously in the totality of community engagement-related activities. For example, you might as a district or region review your overall strategies and consider yourself operating at Level 3 “Involve” -- but you might also catch that some of your engagement methods are Level 1 “Inform” while some of your teachers and staff are operating in Level 4 “Collaborate.” The framework is intended to illuminate and support this multiplicity while suggesting concrete ways to move further along the spectrum.

We recognize [Facilitating Power](#) and [Movement Strategy Center](#) for their work in building this framework and appreciate their support to adapt it. Facilitating Power is dedicated to cultivating personal and collective power through innovative approaches to education and organizing that meet the demands of our shifting social climates. Movement Strategy Center works with grassroots organizations, alliances, and networks, as well as funders, to build powerful and transformative social justice movements.

LEVELS OF COMMUNITY ENGAGEMENT

0	1	2	3	4	5
STANCE TOWARDS COMMUNITY					
IGNORE	INFORM	CONSULT	INVOLVE	COLLABORATE	DEFER
INTENTION & UNINTENDED IMPACT TO CONSIDER					
Protecting School, District, Regional Interests Unintended Impact to Consider: <i>Marginalizing Communities</i>	Keeping Communities Updated Unintended Impact to Consider: <i>Placating & Underestimating Community Wisdom</i>	Receiving Community Input Unintended Impact to Consider: <i>Tokenizing & Gatekeeping Community Engagement</i>	Meaningfully Engaging Community Voice Unintended Impact to Consider: <i>Community Voice is Not Heard</i>	Collaborating and Sharing Power with Communities Unintended Impact to Consider: <i>Collaborative Process Derailed by Power Dynamics & Lack of Relational Trust</i>	Communities Drive and Own the Work Unintended Impact to Consider: <i>Sovereignty and Core Agreements are Not Honored</i>
COMMUNITY ENGAGEMENT GOALS					
Deny access to decision-making processes	Provide students, families & community with relevant information for them to support district, school or regional goals	Gather input from students, families & community without including them in decision-making	Ensure students, families & community needs and assets are integrated into applicant process & planning	Ensure student, family & community capacity play a leadership role in implementation of decisions	Foster lasting educational equity through community-driven schools that are culturally rooted and responsive to whole and sovereign people and communities
EXAMPLE ENGAGEMENT METHODS					
<ul style="list-style-type: none"> ▪ Closed door meeting ▪ Misinformation ▪ Systematic effort to avoid engagement 	<ul style="list-style-type: none"> ▪ Fact sheets ▪ Open houses ▪ Presentations ▪ Billboards or school electronic boards ▪ Videos ▪ Social media posts 	<ul style="list-style-type: none"> ▪ Input sessions ▪ Focus groups ▪ Empathy interviews ▪ Surveys 	<ul style="list-style-type: none"> ▪ Collaboration or engagement with community organizing and community voices ▪ House meetings ▪ Interactive workshops & forums with accessibility and safety considerations ▪ Student & Parent/Family Advisory Committees 	<ul style="list-style-type: none"> ▪ MOUs with Community-based organizations ▪ Leadership Development ▪ Resources & funding allocated for community organizing ▪ Collaborative design and facilitation of community forums to ensure voice, safety & accessibility 	<ul style="list-style-type: none"> ▪ Community-driven planning ▪ Student or Parent/Family led community forums to assess challenges and develop solutions ▪ Consensus building ▪ Participatory Action Research and community-driven initiatives ▪ Participatory budgeting ▪ Community schools
KEY EXAMPLE STRATEGY TO CONSIDER FOR ENGAGEMENT METHODS					
Establish who the community is composed of	Language Accessibility	Hospitality and reciprocity practices	Staff training on anti-racist equity and culturally sustaining and responsive practice	Deeper strategy and visioning work with local community-based organizations (e.g. non-profits, churches, etc)	Allocating integrated strategies/activities for community-driven projects and use
HOW COMMUNITY ENGAGEMENT COULD EXIST IN INTEGRATED PLAN					
Focal student groups not acknowledged and/or subsumed in another category (e.g. students of color lumped into students experiencing poverty) Associated Challenge: <i>Students of color continue to be invisibilized by a system of White Supremacy</i>	Communities informed that integrated planning is occurring but not engaged for input Associated Challenge: <i>Community needs continue to be invisible because they are merely informed, not solicited for input</i>	Data (including disaggregated data) are used as primary resource to inform strategies/activities Associated Challenge: <i>Communities are only engaged once in the process of plan creation and follow-through is limited</i>	Tribal Consultation and engagement is central to the development of integrated plans Associated Challenge: <i>Community (and tribal) voice is taken but not actually incorporated</i>	Partnerships with community-based organizations, organizers, employers, and other agencies Associated Challenge: <i>Partnerships are created but not honored through continual reciprocity and shared work</i>	Task forces and committees with decision-making power composed of community members, target focal groups, and staff Associated Challenge: <i>Decision-making is rhetorically granted but in practice not deferred and shared with community</i>

In the sections below, we will walk through the seven rows of the spectrum and explain what they mean.

Stance Towards Community: This row indicates a spectrum of orientations towards family and community engagement. Level 0 ignores and marginalizes the students, community, and staff that was designed to focus on and will not meet requirements in ODE’s review of integrated plans. Levels 1-5 demonstrate the wide range of approaches that applicants may take to engage communities. It is important to note that you may exist in multiple places on the spectrum at the same time, and there are times where it is appropriate to engage communities at level 1 and 2 (for example -- providing students and families with information about an upcoming engagement session). In most cases, however, deepening your engagement approach across the spectrum will present the most robust community engagement opportunities and possibilities.

Intention & Unintended Impact to Consider: This row names the core intention that is often expressed when justifying each type of engagement. This intention may be completely appropriate for the nature of the task or project, but it could also create unintended impact or represent underlying beliefs about community that need to be addressed, including whether or not another level of the spectrum should be aimed for.

Community Engagement Goals: This row points to the main goal that each level of community engagement is seeking to accomplish.

LEVELS OF COMMUNITY ENGAGEMENT

0	1	2	3	4	5
STANCE TOWARDS COMMUNITY					
IGNORE	INFORM	CONSULT	INVOLVE	COLLABORATE	DEFER
INTENTION & UNINTENDED IMPACT TO CONSIDER					
Protecting School, District, Regional Interests <i>Unintended Impact to Consider: Marginalizing Communities</i>	Keeping Communities Updated <i>Unintended Impact to Consider: Placating & Underestimating Community Wisdom</i>	Receiving Community Input <i>Unintended Impact to Consider: Tokenizing & Gatekeeping Community Engagement</i>	Meaningfully Engaging Community Voice <i>Unintended Impact to Consider: Community Voice is Not Heard</i>	Collaborating and Sharing Power with Communities <i>Unintended Impact to Consider: Collaborative Process Derailed by Power Dynamics & Lack of Relational Trust</i>	Communities Drive and Own the Work <i>Unintended Impact to Consider: Sovereignty and Core Agreements are Not Honored</i>
COMMUNITY ENGAGEMENT GOALS					
Deny access to decision-making processes	Provide students, families & community with relevant information for them to support district, school or regional goals	Gather input from students, families & community without including them in decision-making	Ensure students, families & community needs and assets are integrated into applicant process & planning	Ensure student, family & community capacity play a leadership role in implementation of decisions	Foster lasting educational equity through community-driven schools that are culturally rooted and responsive to whole and sovereign people and communities



Example Engagement Methods: This row lists some common example engagement methods, tactics and tools that applicants can exemplify at each level. Each method can also be employed in various ways along different levels of the spectrum.

Key Strategy to Consider for Engagement Methods: This row names a key example strategy that underpins a particular community engagement method. Strategy is a higher level plan and intention that links a particular group of methods, tools, and tactics together.

How Community Engagement Could Exist in Plans: This row lists a common way that this level of community engagement could show up in actual plans and a key challenge associated with this way of engaging communities.

LEVELS OF COMMUNITY ENGAGEMENT


0	1	2	3	4	5
EXAMPLE ENGAGEMENT METHODS					
IGNORE <ul style="list-style-type: none"> Closed door meeting Misinformation Systematic effort to avoid engagement 	INFORM <ul style="list-style-type: none"> Fact sheets Open houses Presentations Billboards or school electronic boards Videos Social media posts 	CONSULT <ul style="list-style-type: none"> Input sessions Focus groups Empathy interviews Surveys 	INVOLVE <ul style="list-style-type: none"> Collaboration or engagement with community organizing and community voices House meetings Interactive workshops & forums with accessibility and safety considerations Student & Parent/Family Advisory Committees 	COLLABORATE <ul style="list-style-type: none"> MOUs with Community-based organizations Leadership Development Resources & funding allocated for community organizing Collaborative design and facilitation of community forums to ensure voice, safety & accessibility 	DEFER <ul style="list-style-type: none"> Community-driven planning Student or Parent/Family led community forums to assess challenges and develop solutions Consensus building Participatory Action Research and community-driven initiatives Participatory budgeting Community schools
KEY EXAMPLE STRATEGY TO CONSIDER FOR ENGAGEMENT METHODS					
Establish who the community is composed of	Language Accessibility	Hospitality and reciprocity practices	Staff training on anti-racist equity and culturally sustaining and responsive practice	Deeper strategy and visioning work with local community-based organizations (e.g. non-profits, churches, etc)	Allocating integrated strategies/activities for community-driven projects and use
HOW COMMUNITY ENGAGEMENT COULD EXIST IN INTEGRATED PLAN					
Focal student groups not acknowledged and/or subsumed in another category (e.g. students of color lumped into students experiencing poverty) Associated Challenge: Students of color continue to be invisibilized by a system of White Supremacy	Communities informed that integrated planning is occurring but not engaged for input Associated Challenge: Community needs continue to be invisible because they are merely informed, not solicited for input	Data (including disaggregated data) are used as primary resource to inform strategies/activities Associated Challenge: Communities are only engaged once in the process of plan creation and follow-through is limited	Tribal Consultation and engagement is central to the development of integrated plans Associated Challenge: Community (and tribal) voice is taken but not actually incorporated	Partnerships with community-based organizations, organizers, employers, and other agencies Associated Challenge: Partnerships are created but not honored through continual reciprocity and shared work	Task forces and committees with decision-making power composed of community members, target focal groups, and staff Associated Challenge: Decision-making is rhetorically granted but in practice not deferred and shared with community





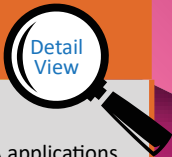
2.2 Deepening into the Spectrum

The Community Engagement Spectrum above described six levels of community engagement. Below, we offer suggestions for moving along the continuum, including reflection questions, resources and actions towards growth that can help unlock deeper community engagement. Finally, it offers a key example that is meant to highlight how each level has occurred in the development of SIA plans up until this point.

0 IGNORE 		
Reflection Questions	Resources and Actions Towards Growth	Key SIA Example
<p>Questions meant to help move deeper along the spectrum and foster meaningful community engagement</p> <ul style="list-style-type: none"> How are you learning more about the systemic bias/oppression that exists in your district/school/region and belief systems/biases? How have/will you acknowledge, address and repair the harm caused by marginalization (historical and present)? 	<p>Resources and key actions that could deepen intentionality at each level or spark movement along the spectrum.</p> <p>Key Resources</p> <ul style="list-style-type: none"> White Supremacy in Oregon <ul style="list-style-type: none"> Black Exclusion Laws in Oregon The Racist History of Portland Rehumanizing Schools Essential Understandings of Native Americans in Oregon Tools to support disaggregating data and looking at key demographics <ul style="list-style-type: none"> Data visualizations provided by ODE District At-A-Glance Profiles <p>Key Actions</p> <ul style="list-style-type: none"> Engage equity, anti-racist, and implicit bias trainings within the district, school and region to learn more about internal and external patterns of racism and oppression Create more engagement and relationship-building opportunities with target focal groups and their families 	<p>Key example from previous SIA applications and consideration to push thinking further</p> <p>“We are a small rural district and do not have many students or families from the varied focal groups.”</p> <p><i>Phrases and statements like this one erase and invisibilize focal student groups and families. Acknowledgement of these groups is glanced over.</i></p>

1

INFORM



Reflection Questions	Resources and Actions Towards Growth	Key SIA Example
<p>Questions meant to help move deeper along the spectrum and foster meaningful community engagement</p> <ul style="list-style-type: none"> ▪ If there are certain groups or communities who aren't engaging in your school, ask yourself why? Why are they not participating and how can the school do better about reaching out and making them feel welcome? (Focus on the system keeping them out, not blame the communities for not showing up). ▪ What communication and engagement outlets best fit the unique strengths/assets and needs of the families and communities you serve? What conditions support this? ▪ What pathways to deeper collaboration and involvement are you planning and can be communicated? ▪ How are you providing families and the community with relevant information regarding current inequities and plans to address them? 	<p>Resources and key actions that could deepen intentionality at each level or spark movement along the spectrum.</p> <p>Key Resources</p> <ul style="list-style-type: none"> ▪ ODE Decision Tools ▪ Spectrum of Family & Community Engagement for Educational Equity ▪ Reframing Family, School, and Community Engagement <ul style="list-style-type: none"> ▪ When You Say...They Think ▪ Dos and Don'ts <p>Key Actions</p> <ul style="list-style-type: none"> ▪ Ensure all communication materials are accessible and in the languages of the target focal groups, families and communities ▪ Ensure language interpretation and translators are available in the most common language groupings in school/district ▪ Consider which communication outlets (formal and informal) are most readily accessed by the community 	<p>Key example from previous SIA applications and consideration to push thinking further</p> <p>Applicants were required to disseminate information about their SIA plans by posting board minutes indicating approval of the SIA plan and the final approved SIA plan on their website. Additionally, applicants shared information about engagement opportunities through their website, school newsletters, the board, and parent meetings.</p> <p>After a reduction in funding, one district shared how they prioritized community inputs from the original plan and their process for creating the reduced funding plan. It was posted on their website, shared at a board meeting, and available for public comment.</p> <p><i>These communication and dissemination strategies assume communities and families understand system and educational intricacies. What other context/stories/training needs to be shared to build overall awareness so they can fully engage/understand?</i></p>

2

CONSULT



Reflection Questions	Resources and Actions Towards Growth	Key SIA Example
<p>Questions meant to help move deeper along the spectrum and foster meaningful community engagement</p> <ul style="list-style-type: none"> ▪ How are you seeking input from students, parents, families, and the community to inform solutions to address educational inequities? How clear and transparent is the information you are providing to inform their input? ▪ What conditions are you creating in your input/engagement sessions to ensure that community members feel safe, heard, and powerful? 	<p>Resources and key actions that could deepen intentionality at each level or spark movement along the spectrum.</p> <p>Key Resources</p> <ul style="list-style-type: none"> ▪ School Reform Initiative protocols ▪ Powerful Partnerships: A Teacher's Guide to Engaging Families for Student Success <p>Key Actions</p> <ul style="list-style-type: none"> ▪ Conduct a landscape analysis of CBOs, community partners, faith-based organizations, culturally specific organizations, tribes, business and industry partners, and other county services ▪ Consultancy protocol or another SRI protocol with community members and partners 	<p>Key example from previous SIA applications and consideration to push thinking further</p> <p>Applicants created opportunities to seek input from the community to establish priorities for the SIA dollars. Common strategies included public meetings, online surveys (in English and Spanish), and focus groups. One district reached out to families of focal groups through mailings and follow-up phone calls made by staff and community partners who speak their preferred language, inviting them to attend focal sessions at which food and child-care were provided. District translators also attended to help facilitate small groups.</p> <p><i>If you create opportunities for families to be consulted, but some focal groups do not attend, do you proceed with integrated plan creation/implementation anyway? Consider slowing down to re-assess how you have created conditions to bring everyone to the table.</i></p>

3

INVOLVE

Voice & Power Shift



Detail View

Reflection Questions	Resources and Actions Towards Growth	Key SIA Example
<p>Questions meant to help move deeper along the spectrum and foster meaningful community engagement</p> <ul style="list-style-type: none"> How are you creating expectations about participation and decision-making for clarity on role/involvement for students, families, and community? How are you creating opportunities in existing structures (e.g. school site councils) for traditionally marginalized groups to participate? How are you learning to listen deeply to different voices, perspectives, and ways of knowing (e.g. culturally responsive trainings for participating staff)? How are you creating space/opportunity to name, address, and heal from historical harm inflicted by the district/school system? How are you demonstrating a commitment to change historical practice and policy? 	<p>Resources and key actions that could deepen intentionality at each level or spark movement along the spectrum.</p> <p>Key Resources</p> <ul style="list-style-type: none"> Beyond the Bake Sale: The Essential Guide to Family-School Partnerships A Match on Dry Grass: Community Organizing as a Catalyst for School Reform <p>Key Actions</p> <ul style="list-style-type: none"> Partner with local CBOs, faith-based organizations, or other local partners who already engage these communities through their leadership programs When engaging parent leadership groups, make sure they reflect the student population Before you make a decision or take an action, consider using a tool like the ODE decision tools to ensure you have engaged the right partners and voices 	<p>Key example from previous SIA applications and consideration to push thinking further</p> <p>In one district, the SIA team worked directly with the Tribal Education Agency as well as the Tribal Cultural and Heritage Program as part of their community engagement process to get input from tribal members. Another district worked with tribal leaders to hold SIA community engagement opportunities at tribal facilities.</p> <p><i>Just because target focal groups are at the table doesn't mean that the table is set evenly. Consider how the backdrop of colonization and settler colonialism creates uneven dynamics for engagement and what forms of acknowledgment, accountability, and follow-through are needed.</i></p>

4

COLLABORATE

Delegated Power



Detail View

Reflection Questions	Resources and Actions Towards Growth	Key SIA Example
<p>Questions meant to help move deeper along the spectrum and foster meaningful community engagement</p> <ul style="list-style-type: none"> What are the formal (e.g. faith-based institutions; community-based organizations) and informal (e.g. family/community networks and coalitions) that can be collaborated with? How do they wish to be involved? How have you ensured that the projects/dilemmas/tasks at hand are made culturally relevant and accessible? How are roles on decision-making and involvement co-constructed with these groups? 	<p>Resources and key actions that could deepen intentionality at each level or spark movement along the spectrum.</p> <p>Key Resources</p> <ul style="list-style-type: none"> Meaningful Student Involvement Guide to Students as Partners in School Change Vehicle of Change: The PS 2013 Campaign <p>Key Actions</p> <ul style="list-style-type: none"> Consider how the school leadership and board play an important role in value-setting and modelling how communities are engaged, parent leaders are heard, and follow-through on needs are met Utilize active structures like Parent Advisory Councils to create space for ongoing reflection, strategizing and goal-setting 	<p>Key example from previous SIA applications and consideration to push thinking further</p> <p>One district created a task-force representative of the community including district staff (classified, specialists, licensed), community organizations, leaders and union representatives, parents and students. Together, they analyzed disaggregated data, elevating bright spots and areas of opportunity. Additionally, the group planned, attended, and supported community engagement events, consistently processed community input after events and ultimately prioritized how to use SIA funds. The group met frequently in the evenings during the formation of the SIA plan.</p> <p><i>Collaborative and two-way partnerships require clear agreements, shared understandings, and processes for learning, feedback, and accountability.</i></p>

5

DEFER TO

Community Ownership



Reflection Questions	Resources and Actions Towards Growth	Key SIA Example
<p>Questions meant to help move deeper along the spectrum and foster meaningful community engagement</p> <ul style="list-style-type: none"> How have you created a larger vision for what community ownership and honoring sovereignty means for your district/school in relation to the larger community? How has the community been involved in this? What beliefs, structures, and processes need to be shifted within your school/district/region to support deeper community ownership? 	<p>Resources and key actions that could deepen intentionality at each level or spark movement along the spectrum.</p> <p>Key Resources</p> <ul style="list-style-type: none"> Toward What Justice? Describing Diverse Dreams of Justice in Education <p>Key Actions</p> <ul style="list-style-type: none"> Develop learning labs for school discipline policies and procedures (example) Student job shadow, internships and workbased learning opportunities are created based on student interest and need and community collaboration 	<p>Key example from previous SIA applications and consideration to push thinking further</p> <p>This level of community engagement is a growth area for applicants. We recognize a handful of applicants that with continued and sustained effort could reach this level of deferring to community ownership. Some examples of this could look like:</p> <ul style="list-style-type: none"> Hiring strategies that structurally prioritize community representation in staff and leadership positions Participatory budgeting processes where communities are involved in the shaping and maintenance of recipient budgets Curriculum that is co-designed and deferred to CBOs Development of new courses/ curriculum based on student aptitude and future learning and employment by workforce partners Community-driven audits of recipient spending (both SIA and other funds)

SECTION 3: STRATEGIES FOR MOVING ALONG THE SPECTRUM



The spectrum and this toolkit are not exhaustive. The aim is to provide a few high leverage strategies to think about moving more deeply towards more robust community engagement and ownership.

3.1 Growing Community Awareness and Knowledge

All applicants feature communities, families and students from focal groups that have historically experienced being underserved, underrepresented, excluded, and/or marginalized from the educational system. As applicants are required to engage communities meaningfully and authentically to inform their plan, it is vital to know and understand the communities and focal groups that this plan is intended to serve. Specifically, applicants need to know which focal groups are represented within their community. Depending on the size of the district, school or region, this may mean that there are just one or two students in a particular focal group; however, regardless of the number of students in a focal area, they still need to be engaged to ensure applicants are not continuing patterns of erasure or defaulting to claims that “we don’t have those students here.”

There is one area of community awareness that needs further attention while holding significant tension - and that is students and families in poverty. Poverty is an experience that crosses through other focal student groups. There is room for significant improvement in recognition and outreach strategies that honor the strengths and meet the needs of students and

families with the least financial resources right now. Any racial tension created around focusing on students in poverty is a false divide. The areas of tension arise, as they should, when a focus on white students in poverty is rhetorically or practically set in opposition or prioritization of other focal student groups. The development of an integrated plan does not and should not contribute to that trap. We can listen, engage, and strengthen educational systems attending to each and every student with a clear racial equity lens and stance without erasing or minimizing poverty.

To grow the awareness of your community, consider completing a community asset inventory or mapping of your community. This would include identifying all of the community-based organizations (CBOs), faith-based organizations, tribal nations, culturally specific organizations, community leaders, and business leaders in your community. Deepening your knowledge of the community will support you as you develop a more robust plan for community engagement.

As you continue to engage with your community and develop future plans, you can also begin to use this inventory to substantiate your community engagement practices. Are you going beyond the minimum requirements to engage with the organizations and leaders identified in your inventory? Are you doing what you said you would do in terms of engaging and incorporating inputs from the organizations and leaders in your community?

The Importance of Intersectionality

While many students may belong to more than one target focal group (e.g. both a student navigating poverty *and* a student of color), applying an intersectional lens to community engagement means *not* focusing on one issue that a student group is experiencing. Disaggregating data and developing a nuanced understanding of the school community is vital to ensure that some issues (e.g. race) are not ignored simply because those students also belong to another group (e.g. students with special needs/disabilities or students navigating poverty). Looking at one's community *intersectionality* allows one to understand how belonging to multiple focal groups can actually *compound* and *exacerbate* issues and challenges faced in any one focal group. It is important to distinguish and differentiate these groups (even if there is also overlap) so that each student can be met with the unique care that is needed for their particular challenges and needs.

3.2 Building Relationships Rooted in Care and Reciprocity

Robust community engagement rests on a foundation of relationships from which deeper transformational work is made possible. Relationship-building in ways that attend to deep care, equity and reciprocity is critical to deepening meaningful and authentic community engagement. Families and communities should be treated as equal and powerful partners with deep educational wisdom. Conditions should be created and attended to so that families feel supported and able to comfortably express their perspectives and participate in design processes. Below are some key considerations as applicants seek to build relationships rooted in care and reciprocity.



Deep Hospitality

Deep hospitality is a rich cross-cultural and equity-centered practice that creates foundational conditions for trust and relationship-building. To extend deep hospitality means to host well and to have guests feel like trusted community members and partners. Applicants are encouraged to think about how families and communities wish to be treated and what would allow them to feel their most comfortable to participate. The physical (or virtual) space should reflect values of care and intention, including culturally responsive and specific considerations such as: What forms of organizing, communicating, and participating are unique to a cultural community and how are we allowing for those to occur in the space? Some other considerations include:

- **Access:** How have you incorporated different abled bodied access and needs? Are the physical or virtual spaces you use comfortable for community members?
- **Basic Needs:** Have all basic needs been accounted for through engagement (bio-breaks, food, etc)?
- **Cultural space:** There are many different ways that communities are accustomed to gathering. Have you considered how one formation (e.g. a circle or smaller groups) might be more culturally responsive than others (e.g. desks in rows)? To create the conditions for meaningful two-way dialogue, you may consider less formal or small group structures.

- **Location:** Consider where you are holding your gatherings, given different ways people have previously experienced school. Are you only hosting meetings at the school buildings? Are there spaces in the community where you consider holding gatherings?
- **Intentionality:** Community members are often juggling multiple responsibilities, which does not mean that they do not wish to provide input. Consider how you have incorporated their life and work rhythms into your planning. What time of the day/week is best to engage them? How long is necessary?
- **Promptness:** Honoring community members time is vital, so ensure that you are beginning and ending on time so they can attend to other needs. However, notice when there is energy and momentum, which could mean you make additional times to engage or stay for longer than you initially anticipated.
- **Flexibility:** Many community members are busy and taking precious time that they hope will effect school change. Consider how different modes of engagement can be flexible with time, including if community members have to show up late or leave early and how to create ample opportunity to provide input.
- **Inclusion:** Throughout any engagement method, from an informal Zoom call to structured focus groups, consider how you will create space for community voice to be welcomed, invited, and included. Whose voice is taking the most time/space during these engagements? What structure/facilitation method are you using to create proportionate representation from the community and target focal groups?

Communication and Language

Creating conditions for clear and equitable communication requires intentional planning and process. Language accessibility is critical, ensuring that proper staff and measures are incorporated so that the languages that communities are most comfortable speaking are adequately met. Additionally, while emphasis is often placed on meeting the needs of various spoken languages, communities and families from different cultures often express themselves through nonverbal, emotional, energetic, and other forms of communication. It is important for applicants

to pay close attention to the subtler patterns in a room, particularly if those come from identities that are not their own. Lastly, consider and embrace the value of tension and disagreement in holding space with families and communities. When [inconvenient voice](#) arises, that is, perspectives and comments that may at first glance seem to derail, muddy, or confuse the conversation, we suggest digging into it further to learn more about where it is coming from and the value that its ‘inconvenience’ may offer for unlocking key barriers to deeper understanding and work.

Applicant Follow-Through

For families and communities to feel valued, applicants should continually follow-up and follow-through on the input that community members have generously offered. As a starting point, you might think about gifts or other tokens of appreciation you can offer that indicate to community members that you appreciate them. In some districts, we have learned that raffles, giveaways, and offering transportation, childcare and/or communal meals have been supportive in honoring the time and input community members are sharing. In virtual engagements, you could consider online gift certificates or other remote gift ideas. Acknowledging and validating community perspectives is another key practice to ensuring they know that you have listened to their stories and needs. Consider how you consistently express gratitude and appreciation for the input you are receiving. Finally, a significant part of the trust- and relationship-building process is following through on key promises and commitments including: information you said you would share following an engagement event; plans you stated would reflect community input; actions that are being taken as a result of community input; ongoing engagement opportunities you were committed to doing to keep the conversation going; etc. These forms of follow-through and accountability help create longer-term trust for deeper community partnerships.

Create an accountability mechanism - the kind of accountability that generates trust.

This can start from answering an essential question: Who does the community go to when they don't feel they've been authentically engaged in the plan development work?

There isn't a single right answer. But it builds trust to have a real and meaningful one. Would they go to a known staff member, an administrative leader, a liaison to a board or advisory group? Creating a clear channel to hear the most vital feedback is pivotal to creating real, ongoing, authentic community engagement.

3.3 Equity, Anti-racist, and Culturally Sustaining and Responsive Training

Engaging in equity, anti-racist, and/or culturally sustaining and responsive training is a powerful way applicants to learn about and address unconscious biases, unexamined assumptions, and internalized and externalized patterns of racism and oppression. ODE will be offering support -- including webinars, trainings, and toolkits (such as the [ODE Decision Tools](#)) -- that are rooted in and builds on the Community Engagement Toolkit and the framework of robust community engagement. In addition to these supports, consider how to balance the development of in-district/school/



regional equity capacity and bringing in external supports. Developing internal capacities (for example, staff who are skilled at holding [courageous conversations about race](#) or interrupting patterns of [white fragility](#)) allows for long-term change and baseline culture-building. Contracting with external services (for example, equity consultants that can hold retreats and trainings) allows for all community partners to participate together. These settings with an outside facilitator can allow for participants to feel safer to take risks and engage vulnerability. Care should be taken to consider who should be present: for example, is the space designed for White staff to learn more about White fragility (in which case staff of color could have their own separate space)?

Powerful case studies and recent research suggest that investing in the capacity of the whole system, including families and communities, is needed to support robust family-school partnerships. [The Dual Capacity-Building Framework for Family-School Partnerships](#) is one framework and tool that leverages applicants to create conditions for both staff and families to deepen their systemic and organizational capabilities (skills + knowledge), connections (networks), cognition (shifts in beliefs and values), and confidence (self efficacy). The main takeaway from this framework: don't just invest in school, educator and staff capacity; also see the families and communities you serve as powerful collaborators that can be supported. Consider:

- Deepening partnerships with local community-based organizations to leverage the powerful and unique organizing, leadership, and educational strategies from grassroots communities and families.
- Creating regular ways of gathering (e.g., restorative circles) with families and community members to reflect on core and differentiated values (using a tool like [The Cultural Iceberg](#)) and share key insights, concerns, and perspectives about educational change.

3.4 Community-Driven Planning

Community-driven planning can take many forms. In a consortium of small districts this might be a small group of volunteers working across many miles. In a larger school district this could be powered by groups that were previously advisory.

A key initial task is to get very clear on what is being invited by whom and how decisions are made and recommendations or plans treated.

Here's a few potential questions and resources that can support creating the conditions for community-driven planning:

- Work with groups like [Oregon Solutions](#) and community-based organizations to facilitate and reach a declaration of cooperation - a foundational agreement on the scope and decision-making of a group of powerful partners. You may have STEM-hubs or EL-hubs who have skill and experience at this kind of process.
- Always design and ask about the “after-action” of any meeting. Ensure that a key person or group is responsible for follow-through with keeping the core promises you've made as a partner with the community. That doesn't mean you make all the decisions - it means you accept a stewardship responsibility to keep the work moving while creating the conditions for the community to lead.
- Convene local and regional CTE advisory groups that include secondary and postsecondary educators, employers and other workforce and community agency members that have been meeting over time and have invaluable information about student next steps after high school.
- Integrate ongoing community engagement into budget planning and staffing cycles. Aim for the goal where the community is so well-informed and co-planning that they are anticipating and driving key directions that anticipate applicant planning needs.
- Determine what must or could yield to community planning. Name what's clear in the scope of the group or body.
- Facilitate conditions where different voices, even representing demographically similar communities, can hold and support tension and disagreement with each other.



- Determine a clear resourcing plan that supports the sustainable participation of key community leaders in a way that builds relationships and strengthens effectiveness. This could range from child care to small leadership stipends that honor the level of time, service, and value the community members offer.

ODE is happy to support or consult applicants looking to advance strategies that reach this level of community partnership.

During the first SIA application cycle, some applicants contracted with community-based organizations to run their community engagement efforts. While this can be one avenue for receiving inputs to support integrated plan development, especially in communities where trust has been previously broken, there is also a tension if this is the only mechanism for seeking input. While a community-based organization may represent a subset of students and families from a particular focal group, it may not represent all of the students and families from that focal group, which may lead to an unanticipated exclusion of some students and families. Applicants considering contracting with community-based organizations to support engagement should be aware of this tension and consider ways to ensure they are not inadvertently excluding voices from their communities.

3.5 Navigating Virtual Community Engagement

We recognize that for many applicants across the state, community engagement will look different now - and in many cases this will include navigating the virtual space. As you consider the Community Engagement Spectrum and strategies offered in Section 3 for more robustly engaging with your community, you'll also need to think about adjustments or pivots you may need to make to accommodate for the virtual setting.

We offer the following examples as ways you may consider engaging in a virtual setting, with the recognition this is not an exhaustive list:

- Set up a regular time to offer informal virtual community hours for families and community members to connect with district or school staff. Ensure that the offered hours are responsive to various work schedules. Select a few questions you plan to ask anyone who comes to the community hours.
- Develop a plan for hosting virtual family-teacher conferences or IEP meetings. Use a portion of the time to ask parents and families a few specific questions about their students' needs and how the district or school should use or prioritize the funds.
- Host a virtual focus group meeting with students and family members from the named focal groups to learn about their experience, the needs they identify, and how they would recommend using the funds. Consider using a platform that allows for small breakout rooms to allow for smaller group conversations and an ability for all attendees to

share their experience and ideas. Select a few open-ended questions you'd like to ask attendees, which may include:

- What is working well in our district for your student(s) and/or family?
 - What is not working in our district for your student(s) and/or family?
 - What changes and/or investments should we make to better support your student(s) and/or family?
 - What does student success look like after graduation? How well is the school supporting student transition to opportunities after earning a diploma
- Facilitate a [world cafe](#) virtual workshop, where participants rotate through small group discussions in breakout rooms. Ask for the community's input for topic areas in advance of the workshop.
 - Establish a standing advisory group representative of your community that will regularly meet virtually over the course of the school year to provide input., make recommendations, and share decision-making responsibility.



3.6 Community Engagement Beyond 2021-23

Robust engagement with your community requires a deep focus and commitment to applying an equity lens or tool to inform planning engagement and developing the integrated plan and budget. Applicants may find through their community engagement that students and families from different focal groups and/or community-based organizations may raise different, and potentially even competing, priorities for spending funds. Further, there is a possibility given the allocation amount, applicants will not be able to implement all of the activities offered by the community.

As applicants move through the various integrated processes and application cycles, there are several times prescribed in the statute when they are required to post items to the website, present them at an open meeting with the opportunity for public comment, and have them approved by the governing board. In a robust engagement process, these shouldn't be the only times when you connect with your students, families, staff, and community.

To support a robust engagement process and good stewardship of the funding in the process of updating plans over the bienniums, applicants should ensure they are sharing the following with their communities:

- An update on what has happened since the last time they connected (i.e. implementation progress, unanticipated adjustments such as funding changes)
- An update on new learnings and priorities raised from community engagement
- Any complexities in adjusting and developing new plans (i.e. tensions in priorities, reduction in funding streams)
- Next steps or processes to continue to receive funding



APPENDIX A: SUPPORT & ADDITIONAL RESOURCES



Here to Support

Your questions are welcome and ODE staff will be as responsive as possible to further support integrated planning and implementation. If you have a question, email ODE.EI@ode.oregon.gov. Please make use of the resources provided here, your ESD SSA liaisons, your CTE Regional Coordinator, peer districts, and the culturally specific and/or school supporting organizations based in your community along with your own judgment and skill-building.

Additional Resources

ODE offers additional community engagement resources and references for consideration:

- [Community Engagement Through Oregon's Student Investment Account \(FBO Research Brief\)](#).
- [Spectrum of Community-Led Approaches \(Tamarack Institute\)](#) - Chart on page 4-5 could be useful to consider the roles the community is invited/allowed to play in a district process and factors that can be brought into play when that is clear.
- [Index of Community Engagement Techniques \(Tamarack Institute\)](#) - Categorizes different engagement strategies within the spectrum they use and reference (inform, consult, involve, collaborate, empower).
- [Engagement Triangle \(Capire\)](#) - Framework for getting to shared understanding about the purpose and meaning of engagement and the appropriate ways/settings for shared meaning making once defined.
- [Tips for Accessibility and Equity in Online Engagement during COVID-19 \(SFU Centre for Dialogue\)](#) - Highlights key barriers to online engagement and potential strategies to address them.
- [Data Equity Walk \(Education Trust\)](#) - Useful methods for districts and communities to engage with and make sense of data together from an equity perspective.
- [Participatory Budgeting Explained \(Participatory Budgeting in Oregon\)](#) - Explains participatory budgeting and suggestions a process on how to engage in it.
- [Rehumanizing Schools](#) - A series of resources for understanding how White Supremacy exists in public education and how to transform it.

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INTRODUCTION

The purpose of this appendix is to provide additional information for charter schools on the necessary steps to apply for funding for the programs outlined in the Integrated Guidance. This includes, defining and distilling the various relationships between charter schools and districts and recommendations on how to best move through the integrated application process for the 2023-2025 biennium. While this appendix will cover funding for the following six programs as mirrored in the Integrated Guidance, it is important to note that the majority of charter schools will only apply for 1-3 of these programs (namely HSS, SIA and EIS)⁹⁸:

- High School Success (HSS)
- Student Investment Account (SIA)
- Early Indicator Intervention Systems (EIS)
- Career and Technical Education - Perkins V (CTE)
- ESSA Partnerships (CSI / TSI schools)
- Every Day Matters (EDM)

For a full description of these programs please refer to Section 1 of the Integrated Guidance. We expect charter schools to read through the Integrated Guidance and use this document as supplemental guidance for pieces that are specific to charter school situations. All charter schools participating in these funding streams will be required to go through a full integrated application process to create a four-year plan. However, we hope that this appendix will help determine what types of funding each charter school should be pursuing and in what formation they should be applying for that funding (independently or with their district). The goal is to have one application and plan for all of the funding streams listed above, but there may be variation in fiscal management or programmatic reporting (see Section 2 of this guidance).

To get started, we recommend charter schools to follow the below steps:

1. Read through the Integrated Guidance in its entirety and use this appendix to help address questions around a) which funding to apply for, b) with whom and how to apply for that funding, and c) development of any special agreements that are needed for funding.
2. Determine which streams of funding you are eligible to receive as a charter school (Section 1 of this guidance).
3. Choose the appropriate scenario in Table A to determine how you will apply for SIA, HSS and/or EIS (Section 2 of this guidance).
4. If serving students in grades 9-12, contact the CTE Regional Coordinator in your area to find out more information about how to participate with your district. You will not be completing an application for Perkins/CTE funds but instead would be part of the district or regional planning and application process.
5. If you are a virtual charter school and not eligible to receive SIA funding, then you would proceed with either an independent application for the other funding streams or work in a consortium with your district for HSS and EIS funding (Section 2 of this guidance).
6. Once you have decided which funding streams you are applying for and how you will be applying (independently or with your district), then proceed with developing your integrated application/plan as outlined in the Integrated Guidance.
 - a. Develop and Submit any needed District Charter Program Agreement(s) with your integrated application (Section 4 of this guidance).

⁹⁸ Please see Section 1 of this guidance to better understand funding parameters for these six programs and why charter schools would only apply for 1-3 programs out of the list provided.

SECTION ONE: UNDERSTANDING FUNDING PARAMETERS

The purpose of this section is to provide further detail regarding funding parameters for charter schools as it relates to the six programs addressed in the Integrated Guidance. As stated in the introduction, while the Integrated Guidance addresses six programs, charter schools will only apply for up to three of those programs if applicable (HSS, SIA, and EIS).

As outlined below, the funding parameters for charter schools to participate in the majority of these programs are simple and straightforward, however more detail has been provided for SIA eligibility as indicated in statute.

1. HSS Funding

Both non-virtual charter schools and virtual charter schools who serve students in grades 9-12 receive HSS funding directly from ODE or through a consortium.

2. EIS Funding

Both non-virtual charter schools and virtual charter schools are able to opt-in to receive EIS funding directly from ODE or through a consortium.

3. SIA Funding Eligibility

Non-virtual public charter schools are eligible to access the SIA grant. While public charter schools are not required to participate in the SIA grant program, there are four ways that charter schools may receive SIA funding:

- a. Charter Districts: The district has a single school that is organized as a public charter school. Charter districts are generally treated as regular school districts and should follow the guidance laid out for districts in the Integrated Guidance for the 2023-25 biennium. If the district's charter school is a virtual public charter school, the ADM attributed to the school will be removed from the district's SIA grant allocation. However, the district is still eligible to apply directly for an SIA grant that will include funds based on the ADM attributed to the district.
- b. Charters Eligible to Apply Independently: Charter schools that are eligible to apply independently meet the following criteria:
 - i. These public charter schools must have a student population of which at least 35% of the student population is composed from one the following student groups:
 1. Economically disadvantaged students who are eligible for free or reduced price lunches under the United States Department of Agriculture's current Income Eligibility Guidelines;
 2. Racial or ethnic groups that have historically experienced academic disparities including American Indian/Alaska Native, Black/African American students, Hispanic/Latino, Native Hawaiian/Pacific Islander, and multiracial; or
 3. Students with disabilities who have an Individualized Education Program (IEP).
 - ii. In addition to the public charter school having at least 35% of their student population ⁹⁹ made up of the above student groups, for any percentage used to calculate the charter school's qualifying percentage, the charter school's percentage must be greater than the district's percentage in the same category.

⁹⁹ Data is based on Second Period extended ADMw; calculated yearly

- c. Charter Schools Participating with a Sponsoring District: All non-virtual public charter schools that are not eligible to apply independently may be invited to participate in their district’s application based on the eligibility requirements outlined in HB 3427.
- d. State-Sponsored Charter Schools: State-sponsored charter schools may be eligible to apply independently. Due to the legislative change in HB 2060, those not eligible to apply independently are now similar to charter schools participating with a sponsoring district and may be invited to participate in their local district’s application. The state-sponsored charter schools that participate in a district application must establish a district charter program agreement (DCPA) with the district.

CTE–PERKINS V FUNDING

According to Perkins Law, charter schools are not eligible to receive Perkins funding for Career Technical Education directly from ODE. Both virtual and non-virtual charter schools serving students in grades 9-12 are participants in those funds through their sponsoring district and should make sure to include language in the charter contract to ensure equitable distribution of these funds. Charter school administrators are encouraged to contact the [CTE Regional Coordinator](#) in their area to determine if their sponsoring district is a direct grant recipient or a consortia member for CTE and to find out more information about how to participate. A charter school must have a CTE Program of Study to be eligible to participate in Perkins federal funds.

CSI/TSI FUNDING

Charter schools and districts do not apply for funding that is associated with being identified as a CSI/TSI school. If a charter school or virtual charter is identified as needing [Comprehensive School Improvement \(CSI\) or Targeted School Improvement \(TSI\)](#), then they will receive ESSA funding through an agreement with the sponsoring district. The district will provide the funding for either district level improvements that benefit all students or give funding directly to the charter school if identified as needing CSI or TSI support. If a charter school is identified as CSI/TSI then they will be required to develop a plan and budget to address the areas in need of support to be submitted with their integrated application with their district. State-Sponsored charter schools will work directly with ODE.

EDM FUNDING

Addressing chronic absenteeism through attention to student engagement, school climate, culturally sustaining pedagogy, and family and community involvement is foundational to the success of each initiative in this guidance. Resources and research which support EDM are now embedded across the five other programs, with capacity and support to districts being aligned through ESDs, community-based organizations, and through each of the initiatives. You won’t see a dedicated one-pager or see EDM as a pulled apart program. This is done intentionally as we align and integrate efforts.

SECTION TWO: HOW TO APPLY

Previously, charter schools have applied for these funding streams in a variety of different formats and in different relationships with their district. You may have applied for HSS funding independently, but applied for SIA funding with your district, and received CTE funding through a regional consortium. However, the Integrated Guidance for the 2023-25 biennium hopes to streamline this process so that you are applying for these six different funding streams (where applicable) through one portal and one application.¹⁰⁰

It is our intent with the integrated plan and application to streamline work for districts and charter schools. We suggest that moving forward, for the 2023-25 biennium, your application and relationship with your district will be defined by your SIA eligibility¹⁰¹ as it is the most detailed in statute (see Section 1 of this guidance). However, we also understand that charter schools may want to maintain fiscal autonomy where allowable, therefore we are providing the following scenarios to best fit your financial management and program planning needs. For all of the below scenarios you would submit one plan and application for all of the funding streams that you are applying for which would allow for one joint community engagement and one joint needs assessment as outlined in the Integrated Guidance. The options below show differences in designating fiscal agent responsibilities and reporting structure.

Table A: Choose Your Own (application) Adventure

SIA Eligibility	Fiscal Agent for SIA	Fiscal Agent for other initiatives under this guidance (HSS, EIIS)	Reporting	District Charter Program Agreement (DCPA)
Scenario 1: Independent Charter ¹⁰⁴	Charter	Charter	Charter submits directly to ODE	N/A
Scenario 2: District Sponsored Charter	District (required)	Charter (optional)	Charter submits through District but via a separate reporting dashboard	District Charter Program Agreement for SIA only
Scenario 3: District Sponsored Charter Partially Administered	District (required)	District (optional)	Charter submits through District but via a separate reporting dashboard	District Charter Program Agreement for all initiatives
Scenario 4: District Sponsored Charter Fully Administered	District (required)	District (optional)	Charter submit through the District and is embedded in their reporting dashboard	District Charter Program Agreement for all initiatives

100 While you may create only one integrated plan or application, your grant agreements will remain program specific and you may have up to three different grant agreements for HSS, SIA and EIIS that will be signed by the fiscal agent designated in EGMS.

101 Unless you are a virtual charter school, in which case please see Scenario 5.

102 CTE/Perkins is not included in this table because in all cases, charter schools will receive the benefit of CTE/Perkins through their sponsoring district. Please see the CTE/Perkins call out box in Section 1.

103 A District Charter Program Agreement (DCPA) is required for SIA if a charter school is participating with their district and a DCPA is required for HSS funding if a charter is in consortium with their district. If a charter school also decides to have their district be their fiscal agent for all other funding streams in this guidance, then we would encourage the use of one DCPA. However, if the district and charter school decide to have separate DCPA for each fiscal relationship then that is left to their discretion. See Section 4 of this guidance for more details on DCPA.

104 Also refers to Charter Districts as defined in Section 2 of this guidance.

SIA Eligibility	Fiscal Agent for SIA	Fiscal Agent for other initiatives under this guidance (HSS, EIS)	Reporting	District Charter Program Agreement (DCPA)
Scenario 5: Virtual Charter (not eligible to receive SIA funds)	N/A	Virtual Charter or District	Virtual Charter submits directly to ODE (even if the District is the fiscal agent)	District Charter Program Agreement needed only if the Virtual Charter has the District as their fiscal agent
Scenario 6: State Sponsored Charter	District	Charter	Charter submits through District but via a separate reporting dashboard	District Charter Program Agreement for SIA

Note: Each program (HSS, EIS, and SIA) will have a separate grant agreement that will need to be signed by the fiscal agent.

Scenario 1: If you are able to apply for SIA funding independently, then you would be your own fiscal agent for SIA as well as all other funding initiatives that you are applying for. You would submit your reporting directly to ODE and no DCPA is needed.¹⁰⁵

Scenario 2: If you are not eligible to apply for SIA funding independently, then you may be invited to participate with your district’s application for SIA. However, if you would like to maintain fiscal autonomy in EGMS for the other funding streams you are applying for, then the district would only be the fiscal agent for SIA funding and the charter school would remain the fiscal agent for all other funding streams. You will be required to submit a DCPA outlining this relationship for the SIA portion of funding. Reporting for all funding streams would occur on a separate dashboard but be submitted through the district per the SIA relationship designation.

Scenario 3: If you are not eligible to apply for SIA funding independently and are invited to participate with your district’s application, the district may also act as your fiscal agent for all funding streams. You will submit one charter budget for all funding initiatives which would be reported on a separate dashboard, but all reporting and financial management would flow through the district. You will be required to submit a DCPA outlining this relationship that covers all funding streams.

Scenario 4: Similar to option 2 in that your district is your fiscal agent for all funding streams and you will be required to submit a DCPA outlining this relationship. The one difference is that your reporting would be embedded within the district’s reporting and you would not be required to submit a separate budget or reporting dashboard. (Note: this may be a good option for charter schools that have a smaller allocation that they are spending on one or two activities).

Scenario 5: If you are a virtual charter school then you are not eligible for SIA funding. Therefore you could pursue 1) an independent application for all other funding streams; or 2) an application with your district as fiscal agent. If you pursue the first option then you would fall under scenario 1 excluding SIA. If you pursue the second option, then you would fall under scenario 3 or 4 excluding SIA.

Scenario 6: If you are a state sponsored charter school not eligible to apply for SIA independently, then the district in which your school is located may invite you to participate in the district’s SIA application and will be your fiscal agent. You are still able to be your own fiscal agent for other funding streams (HSS and EIS) if you choose to do so. You will be required to submit a DCPA outlining your SIA relationship and how your reporting is received by ODE will be determined on a case-by-case basis.

¹⁰⁵ An independent charter school is allowed to partner with their district if they choose to do so. If this option is chosen, then the district and charter school would need to decide between scenario 2, 3, or 4.

CONSORTIA FOR CHARTERS

- Unique consortia are not allowed for charter schools under SIA funding.
- Charter schools are able to be a part of a CTE Regional Consortia.
- Virtual charter schools could be in consortia with each other, when only receiving HSS funding. Virtual charter schools may be eligible to join in consortia with schools and districts receiving other funds, but may not benefit from SIA funding.

For additional guidance on Consortia please refer to Section 1 of the Integrated Guidance. Please contact ODE to discuss the best scenario for you to receive funding for the 2023-25 biennium if you do not fit under one of the scenarios presented in Table A.

VIRTUAL CHARTER SCHOOLS

Virtual charter schools are not eligible to apply for SIA grants, however they can participate in EIS funding, as well as CTE and HSS funding (if they serve students in grades 9-12).

Option 1) If a virtual charter school is participating with their sponsoring district on an integrated application for HSS and EIS funding and the district receives SIA funds, then the application and plan would remain integrated, however the virtual charter school is not included in the district's SIA allocation and reporting data, nor are they required to be included in the LPGT performance measures or adhere to community engagement requirements. Under this option a needs assessment would be required for virtual charter schools as required by HSS.

Option 2) If a virtual charter school wants to apply for HSS and EIS funding independently of their sponsoring district then they would pursue an integrated application for EIS and HSS funding streams. Virtual charter schools will participate in an amended version of the integrated application and they are NOT required to participate in the following:

- LPGT Performance Measures as outlined in Section 6 of the Integrated Guidance.

- Community engagement as outlined in Section 2 of the Integrated Guidance.

Please contact ODE to discuss the best scenario for you to receive funding for the 2023-25 biennium if you do not fit under one of the options presented above.

SIA CHARTER SCHOOL AND DISTRICT RELATIONSHIP

According to administrative rule¹⁰⁶ before each application cycle, ODE will publish lists of public charter schools that are:

1. Eligible to apply independently for SIA funding
2. Charter schools that can be invited to participate with a sponsoring district for SIA funding
3. State-sponsored charter schools for SIA funding

Districts and charter schools are only allowed to make shifts to their relationship during an application cycle that will occur at the beginning of a biennium. Changes in relationships cannot occur mid-biennium. This means that if you applied with your district at the beginning of the 2023 biennium, but then became eligible to apply independently in 2024 you would still need to remain in relationship with your district until the 2025-27 application cycle when you could pursue an independent application.

A Note for Districts on Charter School participation in SIA

- Districts determine whether they will invite their charter schools to participate in the district SIA plan. Districts are strongly encouraged to invite all non-virtual charter schools within the district boundary.
- If a district invites one charter school to participate, it must invite all non-virtual charter schools located within the district to participate.
- It's important to remember when a charter school is not included in a district application, the district's total SIA allocation will be reduced by the nonparticipating charter schools' ADMw SIA funding calculation.
- If a charter school closes during the biennium, then the district grant agreement allocation will be adjusted for the following grant cycle with the updated ADMw from each year.
- If a charter school is NOT invited to participate in SIA, this does not affect its ability to apply for any of the other funding streams outlined in the Integrated Guidance.

106 OAR 581-014-0007 (adopted 3/20/2020)

SECTION THREE: REPORTING REQUIREMENTS BASED ON YOUR APPROACH

PROGRAMMATIC AND FINANCIAL REPORTING AND AUDITING

This section reiterates some of the key report requirements offered in Section 6 of the Integrated Guidance. Charter schools will be held to the same reporting requirements as districts whether they have applied independently or are reporting with the district. However, the reporting structure may vary depending on the option you chose for applying for funding. Please see the adapted table below to show the reporting structures:

Table B: Reporting Structures

SIA Eligibility	Reporting	District Charter Program Agreement (DCPA)
Scenario 1: Independent Charter ¹⁰⁷	Charter submits directly to ODE	N/A
Scenario 2: District Sponsored Charter Scenario 3: District Sponsored Charter Partially Administered Scenario 6: State Sponsored Charter	Charter submits through District but via a separate reporting dashboard District is accountable to ODE and must ensure the charter school completes the reporting requirements.	District Charter Program Agreement for SIA and other initiatives as appropriate.
Scenario 4: District Sponsored Charter Fully Administered	Charter submit through the District and is embedded in the District reporting dashboard	District Charter Program Agreement for SIA and other initiatives as appropriate.
Scenario 5: Virtual Charter (not eligible to receive SIA funds)	Virtual Charter submits directly to ODE if they apply independently (for HSS and EIS reporting) Virtual Charter submits via the District if they join a District integrated application (for HSS and EIS reporting)	District Charter Program Agreement needed only if the Virtual Charter has the District as their fiscal agent

GUIDE TO PROGRESS REPORTING

Beginning in the Fall of 2023 and continuing approximately each quarter thereafter, both districts and charter schools are required to submit programmatic and financial progress reports to ODE to monitor progress and complete spending prior to the end of the grant period.

The reporting dates for the 2023-25 biennium will be outlined in the grant agreement that grantees receive after submitting a complete plan and application in the Spring of 2023. ODE will also share reminders via Smartsheet and through EII messages as reporting deadlines are approaching. The details and format of this report will be released at a later date but will be similar to what was required for SIA reporting dashboards through Smartsheet.

GUIDE TO ANNUAL REPORTING

SIA recipients are required by statute to review their own progress on an annual basis through a cumulative progress report and municipal audit. This requirement is for both districts and charter schools and now extends to all funding initiatives as we pursue an integrated process in 2023-25. Districts with participating charter schools are encouraged to include their charter school's reflections and progress within their submission of their Annual Progress Report. Charter schools who applied independently for SIA funding will submit their own Annual Progress Report that will be included on their reporting dashboard before the fourth quarter report.

¹⁰⁷ Also refers to Charter Districts as defined in Section 2 of this guidance.

Annual Progress Report: The annual progress review will ask recipients to review their implementation efforts, progress with any local metrics that were established in the grant development process, review how their strategies worked (or didn't), and work with ODE to substantiate changes within progress markers. This is a requirement for all charter schools who apply for SIA funding independently of their district. See Section 6 of the Integrated Guidance for more information.

Annual Municipal Audit: Under Section 15 of the Act, SIA grant recipients are required annually to conduct a financial audit of the use of grant funds in accordance with the Municipal Audit Law. This is a requirement for all charter schools who apply for SIA funding independently of their district. However, all public charter schools that receive any SIA grant funds should be prepared to account for these funds separately in their annual municipal audit. See Section 6 of the Integrated Guidance for more information.

SECTION FOUR: DISTRICT CHARTER PROGRAM AGREEMENT (DCPA)

A District Charter Program Agreement (DCPA)¹⁰⁸ is required whenever a charter school is joining in with a district for funding or for any program where the district acts as the fiscal agent under this guidance (see Table A in Section 2 of this guidance). ODE does not require or provide a specific DCPA template; however, the following sections must be addressed:

- Charter School Plan and Budget for Eligible Funding
- Exchange of Services
- Distribution of Funds
- Administrative Costs
- Allowable Uses
- Joint Determination
- Accountability
- Reporting Progress
- Additional Components to Consider

Updated DCPA should span the 2023-25 biennium¹⁰⁹ and must be submitted as part of the integrated application due to ODE by June 30, 2023. If the district becomes the fiscal agent for all funding streams in this guidance, then we encourage districts and charter schools to have one agreement that would outline the fiscal and programmatic relationship between the district and charter school. However, the use of one DCPA is not a requirement and districts and charter schools can decide if they would prefer to have one agreement that covers the SIA relationship and one agreement that covers each individual funding stream OR one agreement that covers the SIA relationship and one agreement that covers all other funding streams. **Grant agreements sent to the district will not be fully executed and funds will not be made available until there is a signed DCPA in place.**

¹⁰⁸ The use of a DCPA in the 2023-25 biennium will replace the Memorandum of Understanding (MOU) and District-Charter Agreement (DCA) that were previously used in the 2021-23 biennium.

¹⁰⁹ If a new charter school is established in the 2022-23 school year, they will be eligible for SIA funding with their sponsoring district in the 2023-25 biennium.

CHARTER SCHOOL PLAN AND BUDGET FOR ELIGIBLE FUNDING

The charter school plan and budget will span the 2023-25 biennium for each funding initiative. As outlined in Section 2 of the Integrated Guidance, each charter school will engage with their district in a needs assessment and community engagement to determine their planned outcomes, strategies, and activities.

When districts and charter schools apply together, it is important that charter school staff play an active role in all aspects of the planning, development, implementation and subsequent monitoring of the shared plan. The charter school may share some or all of the same outcomes, strategies and activities with the district in the plan, or alternatively, may have their own specific priorities that are listed in the plan. Either way, it's important that the district-community-charter relationship is maintained over the course of the year(s) so that a shared understanding of implementation successes and challenges is developed and that everyone works together to support the needs of every student. One approach to ensuring a strong district-charter relationship from the beginning may be to develop a team that meets at regularly scheduled times, with representation from the participating charter school(s) as community engagement, planning, updating, monitoring and implementation unfold.

EXCHANGE OF SERVICES

Sponsoring districts and charter schools may mutually agree to have the SIA grant or other grant funding (HSS, EIIS) fully or partially administered by the district. The Agreement should clarify what services the district and the charter school will be responsible for providing. Please refer to Table A in Section 2 of this guidance to determine how you will proceed with fiscal responsibilities for each funding stream.

Grant fully administered by the district: If the grant is completely administered by the district, this means that the charter school will be fully embedded within the district plan and budget and reporting will occur on the same reporting dashboard. There will be no financial pass-through amount in the DCPA, and the district will spend all grant funding on behalf of the charter school and to the benefit of the charter school.

Grant partially administered by the district: If a grant is partially administered by the district, then the district will provide broad fiscal and monitoring oversight; however, the charter school will act largely independently. The district will pass through the partial or full allocation to the charter to spend funds on their own. The charter school will maintain its own plan and budget and will report progress separately on the charter school dashboard but reporting submission will flow through the district to ODE.

If the district and charter school agree for the district to retain any portion of the funds generated by the ADMW attributed to the charter school, the agreement should describe:

- the level of service the charter school can expect (such as use of the district's hiring services, providing disability support services, or professional development, etc.);
- description of how those funds retained by the district will be used; and
- how the charter school may benefit from or participate in activities paid for with those funds.

In some cases, it might be mutually agreed upon that the charter school will provide services to the district. A charter school may be well positioned to offer training or professional development to the district. Other services that should be included in the agreement are: fiscal oversight and management of the grant; data collection and preparation; and procurement and contracting.

DISTRIBUTION OF FUNDS

The agreement should clarify whether or not the charter school will receive funds from the district (partially administered) or whether the charter school will mutually benefit from planned spending of funding by the district (fully administered). In some instances a district and charter school may have a relationship where they function as one "district" and the charter school does not plan to spend the funds separately from the district.

If the charter school will receive funds, the agreement should specify the percentage or amount that the district will pass through to the charter school and what percentage, if any, the district will withhold. ODE encourages school districts to pass through 100 percent of the funds generated by the ADMw attributed to the charter school.¹¹⁰

Examples of when a district may choose to not pass through 100 percent of the funds include administrative costs, professional development, or other services or activities that would benefit both the district and the charter school. However, these funds and their purpose need to be appropriately outlined in the DCPA and agreed upon by both parties. Agreements should include a general timeline for the distribution of funds that aligns with ODE's calendar for distribution to the district. This might be similar to other timelines in the charter school contract (e.g. disbursement of funds to the charter school will occur within 10 days of when the district receives the funds from the ODE).

In some cases, a district may want to pass through more than the charter school allocation. If a district is interested in passing through additional funding to the charter school, the district must submit a request to their District Grant Manager at ODE with the rationale for passing through more funding. ODE will review the request and notify the district and charter school whether the request has been approved or not.

ADMINISTRATIVE COSTS

While not required, a grant recipient may use administrative costs for SIA and HSS funding.¹¹¹ If a charter school plans to spend funding on administrative costs then they must adhere to the programmatic parameters from statute that are outlined below.

For SIA funds, administrative costs include indirect costs related to allowed expenditures as provided in the grant agreement. Administrative costs are limited to 5 percent of the total expenditures or \$500,000, whichever is less. Any administrative costs incurred by a participating charter school must be accounted for within the school district's overall limit of 5 percent or \$500,000, whichever is less. The DCPA should state what percent of the charter allocation may be used on administrative costs.

For HSS funds, administrative costs are allowed at a cap of 4% of a grant recipient's allocation over the course of a biennium. If grant recipients (including charter schools) are taking administrative costs from HSS, per ORS 327.889, they will need to conduct an annual analysis of student attendance in grades 9 through 12 and disciplinary referrals, suspensions, and expulsions in grades 9 through 12 disaggregated by race and as part of their annual progress report. Unlike SIA funds, districts who are the fiscal agent for charter schools under HSS funding, are not allowed to withhold any funding for administrative costs or services and the entire charter school allocation must be passed through to the charter school.

ALLOWABLE USES

The DCPA should link, document, or otherwise include information that aligns with ODE's Integrated Guidance regarding the allowable use of grant resources.

JOINT DETERMINATION

DCPA language should include language that assures that each party to the agreement:

1. Agrees to be bound to every statement or assurance made by the lead in a shared application
2. Have the authority to execute the DCPA
3. Are familiar with the planning relevant to the DCPA (integrated application, HSS plan, etc) and are committed to working collaboratively to meet the responsibilities specified in the DCPA
4. Will comply with all the terms of the Grant and all applicable Federal and State laws and regulations

ACCOUNTABILITY

State resources under this guidance must be used for their intended purpose and meet a level of scrutiny for their impact, over time, to student well-being, academic achievement, and the goals established more fully in the Integrated Guidance. Each charter school, regardless of the scenario of configuration, holds responsibility along with their sponsoring entity, to meet these aims. ODE holds responsibility to make sure the right reporting practices and information is shared through sponsoring parties or directly to ODE for each program or fund source.

¹¹⁰ For HSS funding, districts are required to pass through 100% of the charter school allocation.

¹¹¹ Administrative costs are not allowable for EHS funding.

The DCPA should outline a clear understanding of how the charter school will be held accountable to the requirements of the funds and expected outcomes. With the exception of virtual charter schools (given limited access to only some programs), charter schools must meet community engagement requirements when developing their plans. Charter schools should either be included in the district’s community engagement or complete their own community engagement that will inform how the charter school plans to spend funds. This applies regardless of the configuration scenario.

Another aspect of accountability under this guidance is the development of Longitudinal Performance Growth Targets (LPGTs), progress markers, and optional local metrics.

Unless a charter school is operating under Scenario 1 (Independently), sponsoring districts and/or district with state-sponsored charter schools located within their boundaries are responsible for and should include students within these charters in their performance reporting.

This is a change from prior guidance to ensure that each student realizes the benefit of state investments and to ensure the right relationship and partnering conditions for students in a given community. Charter schools may develop their own LPGTs and optional local metrics or plan to use the district’s LPGTs. Details of performance agreements should be documented in the DCPA.

ODE will be responsible for the review of performance for charter schools who have direct awards of grant funding because they were eligible to apply independently.

REPORTING PROGRESS

The charter school should submit its progress toward meeting these targets in alignment with the district’s reporting timeline and format requirements for ODE as documented in the DCPA

The district and the charter school should also include clear expectations regarding how the charter school will report expenditures of funds. How and when will the charter school submit programmatic and fiscal reports? (in alignment with the Options in Table B of this section) What happens if the charter school fails to expend funds according to the allowable uses and how will funds be returned to the district once the grant period has ended? How is the charter school accounting for funds and are the funds easily audited?¹¹²

ADDITIONAL COMPONENTS TO CONSIDER

Within the DCPA, districts and charter schools may want to consider the following component:

1. Universal Summer Extension: Currently SIA funding has been extended to September 30th of each calendar year, however districts and charter schools are allowed to opt-out of the summer extension. It may be helpful to include how charter schools will communicate with their district about whether they would like to opt-out of the summer extension and complete spending by June 30th. This will need to be a joint decision, as a district cannot opt-out if a charter school needs to continue spending through the September 30th end date and vice versa.
 - a. The universal summer extension does not currently apply to HSS or EIS funding. Currently, HSS recipients have to request a summer extension. There are plans in place to work with the State Board of Education to make adjustments to this process to align with the SIA Universal Summer Extension timeline. Additional guidance will be coming on this piece before the spring 2023 application window.

¹¹² ORS 338.095 requires public charter schools to have an annual municipal audit. All SIA funds received by the charter school should be included in this audit and reported as a separate account.

SECTION FIVE: CHECK YOUR WORK

- Have you checked the funding parameters for all funding streams and decided which program you will apply to with an Integrated Application?
- Have you checked whether you are able to receive funding for SIA as 1) an independent charter school; or 2) as a charter school participating with a district?
- If you are invited to participate in a district's SIA application, have you contacted your District to make a plan for a joint needs assessment, community engagement, and joint plan/application?
- If you are eligible to receive SIA funding as an independent charter, have you made a plan to conduct a needs assessment, community engagement and an integrated plan/application?
- If you are receiving SIA funding through a district, have you drafted a DCPA between the charter school and the district?
- If you are receiving HSS or EIS funding through your district, have you drafted a DCPA between the charter school and district?
- If you have been identified as receiving CSI/TSI assistance, have you submitted a budget and plan to your district to be submitted to ODE? (If a state sponsored charter school, have you submitted your budget and plan directly to ODE?)
- If you are a school serving students in grades 9-12 and are interested in participating in CTE funding, have you contacted the CTE Regional Coordinator in your area to determine if your district is a direct grant recipient or a consortia member for CTE and to find out more information about how to participate?

APPENDIX C: YOUTH CORRECTIONS EDUCATION PROGRAMS AND JUVENILE DETENTION EDUCATION PROGRAMS

The purpose of this appendix is to provide additional information for Youth Corrections Education Programs (YCEP) and Juvenile Detention Education Programs (JDEP) on the necessary steps to apply for funding for the programs outlined in the Integrated Guidance. This includes, defining and distilling the options available to school districts and Education Service Districts (ESDs) operating YCEP and JDEP programs on how to best move through the integrated application process for the 2023-25 biennium.

Previously, YCEP and JDEP programs have applied for these funding streams in a variety of different formats. The Integrated Guidance for the 2023-25 biennium hopes to streamline this process so that programs are applying for these three different funding streams through one portal and one application .

While the Integrated Guidance addresses six programs, YCEP and JDEP programs will only apply for up to three of those programs - HSS, SIA, and CTE - with two options for accessing funding:

1. **APPLY INDEPENDENTLY:** School districts and ESDs operating YCEP and JDEP programs are eligible to apply independently, submitting one application, plan, and budget for HSS, SIA, and CTE.
2. **ALIGNED PROGRAM CONSORTIA:** Two or more eligible applicants apply as an “Aligned Program Consortia,” meaning they apply for joint funding and implement the programs covered in this guidance through a joint grant agreement. This could look like two or more school districts, eligible independent charter schools, and/or YCEP and JDEP programs applying together, or two or more YCEP or JDEP programs applying together. If you have previously established a consortia through HSS, you may want to consider continuing that relationship. When this kind of consortia is formed, each party is agreeing to operate in full alignment with shared fiscal responsibility, where multiple entities do one engagement, application, budget, etc., that are all completed together. One entity is named as the lead to assist in financial and programmatic monitoring and reporting.

To get started, we recommend YCEP and JDEP programs follow the below steps:

1. Read through the Integrated Guidance in its entirety and use this appendix to help address questions around how to apply for that funding.
2. Determine if you will apply independently or as part of an aligned program consortia.
 - a. If applying as part of an aligned program consortia, determine who you will be applying with. This could include school districts, eligible independent charter schools, or other YCEP and JDEP programs.
3. Begin planning for your integrated application and plan to be submitted in March 2023.

APPENDIX D: SUMMARY OF QEC BEST PRACTICE RECOMMENDATIONS

In August of each even-numbered year, the Quality Education Commission (QEC) presents the Oregon Legislature with a report that outlines best educational practices, makes recommendations for actions that the legislature and Oregon's schools can take to improve student outcomes and estimates the funding level needed to meet Oregon's K-12 education goals.

The [August 2020 Quality Education Model Final Report](#) recommendations build upon earlier versions, attend to current circumstances including the impacts of the Coronavirus, add new recommendations, and include a new district spending and student outcome analysis tool.

The integrated planning process will require districts to build systems that cultivate continuous improvement and use a needs assessment for equity-based decision making. The [August 2018 Quality Education Model Final Report](#) stresses building system capacity and coherence and warns against plans focused primarily on discrete programs, activities and interventions. These specific recommendations draw on the work previously completed for the August 2018 Quality Education Model Final Report as well as for prior reports dating back to the original report in 1999. More detail on the recommendations can be found in the [individual QEM reports](#).

SUMMARY OF GUIDANCE FROM THE COMMISSION

- **Oregon should make educational equity and eliminating gaps in opportunity and achievement its primary education goals.** We should no longer tolerate an educational system that delivers inequitable results, disadvantaging students of color, English learners, disabled students, and students from low-income families. An inadequate education will disadvantage them throughout their lives

- **We should focus our educational improvement efforts on system and process improvement.** We should avoid the temptation to rely on discrete programs, activities, and interventions that only treat the symptoms, not the root causes, of the system's inadequacies

In the short-term, these actions are the most important:

- Continue implementing the foundational elements of the Student Success Act
- Develop plans to assist students who were the most adversely affected by the school closures

In the longer-term, focus on these actions:

- Institutionalize equity based practices within schools
- Increase equal opportunity and access to high-quality early learning programs
- Pay attention to social and emotional learning.
- Build systems designed to continuously improve.
- Distribute resources to individual schools based on measures of student need
- Work cooperatively with partners to effectively implement the provisions of the Student Success Act

Elements of a coherent continuous school improvement model include:

- **A Shared Vision** that promotes a positive school culture and environment that emphasizes academic excellence, shared responsibility, collaboration, and mutual trust and respect
- **A Common Understanding of the Problems to be Solved** through honest discussion with staff, students, and parents to identify which aspects of the existing system, practices, and processes are at the root of the problems so that those parts of the system can be made better

- **Effective Teachers** supported by high-quality induction, support, and mentoring and contains these elements:
 - context-specific professional learning that builds capacity for small group facilitation
 - analysis of individual student needs strategic planning to address root causes of underachievement, and partner networking
 - time and support for data analysis and diagnosis of student needs and sharing of expertise in solving teaching challenges
 - meaningful evaluations and feedback about standards aligned classroom performance and professional collaboration
 - including teacher leadership (trying, evaluating, and planning new practices) in the career path
- **Strong and Stable School Leaders** who foster a shared vision and culture of trust and support, develop and empower effective teachers, coordinate support staff and external partners, and assure the coherence of the processes and practices that ensure every student and teacher has and meets high expectations
- **Well-coordinated Support Staff** who promote a culture of learning through support of both academic and personal issues
- **Community Partners** who add value by working on the ground to directly assist families, students, and schools in solving challenges, providing wraparound services, and connecting schools to their neighborhoods
- **Engaged Parents** who have the necessary information to help their students stay on track and to get involved and connected to the larger school community

The Commission recommends districts use the following framework to build coherence and to deploy resources in the most productive way.

- Institute a coherent governance system coordinated across the school, district, and state levels, with well-articulated priorities at each level and a clear vision of where cooperation is needed
- Provide strong supports (high-quality Pre-K, affordable healthcare, family wrap-around supports) so children arrive at school prepared, healthy, and eager to learn
- Ensure that students with the highest needs have access to the best teachers
- Develop a highly coherent instructional system
- Create clear pathways for students through the system, set to global standards, with no dead ends
- Ensure an abundant supply of highly qualified teachers through grow your own programs that begin with high school students
- Recruit and invest in the leadership development of teachers and staff so they can lead and develop strong systems of instruction
- Professionalize teaching by providing supports and incentives for learning and continuous improvement, increasing teachers' role in decision-making through communities of practice, and providing more non-classroom time to improve instruction
- Create an effective system of career and technical education and training that requires high-level academic performance from all students

While the above elements and framework are a necessary component for long-term and sustainable improvement in student outcomes in Oregon, they are not sufficient. Also critical are effective educational practices and investments that are well implemented. Because needs can vary tremendously among districts and schools, each district should evaluate the investments that will have the greatest impact in each of their schools, as identified in their needs assessments. Many of these practices and investments have been discussed in the QEM reports over the years and are summarized here. The summaries are followed by a list of further sources of information that may be of interest to districts and schools.

QEM 2018 REPORT

The [2018 report](#) focuses on the structures and systems required for a sustainable school improvement model. The key elements of such a model were described at the beginning of this document, but more specific recommendations include the following:

- Districts and schools need to develop “network improvement communities” that provide a framework for creating coherent systems and processes for long-term improvement. ODE should assist districts and schools in doing this work; and
- All levels of the education enterprise should pay more attention to equity. The state must pay attention to the equitable distribution of funding to school districts, and districts must pay attention to the equitable distribution of resources to individual schools. Schools, for their part, must assure that the high-needs students in their care get an education that is tailored to their specific needs

QEM 2016 REPORT

The [2016 report](#) focuses on preparing students for post-secondary success.

- Schools should promote a culture of college-going, particularly among students that don’t have a history of college-going in their families;
- This requires a collaborative effort among administrators, teachers, staff, students, families and the community; and
- Schools need to design structures that help staff get to know students well.

QEM 2014 REPORT

The [2014 report](#) focuses on resource allocation.

- Resources must be allocated to the uses where they have the most positive impact on student learning;
- More resources should be allocated to the early grades and to schools that have more students with higher needs, including students from low-income families, English learners and students with disabilities; and
- Districts and schools should work to reduce the rate of chronic absenteeism, with attention paid to creating a school environment and culture that is more engaging for students and promoting closer connections between students and staff.

QEM 2012 REPORT

The [2012 report](#) focuses on teacher collaboration and formative assessments.

- Enhance the collection and use of data from formative assessments;
- Spend at least 60 minutes per week analyzing assessment data with colleagues;
- Give feedback to students and parents frequently;
- Promote teacher collaboration and devote enough time and resources so it is implemented well; and
- Teacher collaboration should include setting specific goals for improving student achievement, including for individual students.

QEM 2010 REPORT

The [2010 report](#) focuses on math instruction, course-taking, and content articulation. The key recommendations are:

- Start offering Algebra for high school credit in the 7th or 8th grade. Analysis on Oregon coursetaking data show that students who struggle with Algebra in the 9th grade are at risk of not completing their math requirements in time to graduate;
- Provide for smaller class sizes in math classes;
- Seek out teachers who have advanced endorsements in math; and
- Develop frameworks for the articulation of math courses from 4th grade through high school, and build a solid foundation in the early grades.

QEM 2008 REPORT

The [2008 report](#) focuses on adequate instruction time for students, adequate collaboration time for teachers and expanded use of formative assessments.

- Add more instruction time and double-dosing in core classes for struggling students;
- Add teacher FTE in math/reading/science to allow smaller classes and more individual attention;
- Provide staff time for study, collaboration and data review aimed at better serving specific students;
- Fund more school-level leadership development; and
- Provide more resources to develop formative assessments and early indicators of students at risk of not succeeding.

QEM 2006 REPORT

The [2006 report](#) focuses on allocating resources to the uses that have the most impact on student learning.

- Provide more funding to early childhood development, Pre-K programs and early reading efforts; and
- Continue high school restructuring efforts, including individual education plans, small learning communities, work-site based learning and extra-curricular programs that promote student engagement.

QEM 2004 REPORT

The [2004 report](#) focuses on staff development, curriculum alignment and resources for students with disabilities.

- Target staff development so teachers can more effectively help students meet state standards;
- Improve the alignment between the K-12 curriculum and Oregon's post-secondary and employment needs;
- Look for efficiencies in providing services to high-cost special education students; and
- Encourage the state to provide more funding for those students.

QEM 2002 REPORT

The [2002 report](#) focuses on indicators of quality and improving the equity of student outcomes. Its key recommendations are:

- Create a personalized education plan for each student and base instruction on individual student needs; 73
- Use data to inform their decisions about individual student needs;
- Have a comprehensive induction plan for new staff;
- Provide and encourage student connections with significant adults;
- Develop career-related learning opportunities with community-based and worksite learning options;
- Offer college course-taking and dual credit opportunities; and
- Provide wraparound services at school sites.

QEM 2000 REPORT

[This report](#) builds on the 1999 report and recommends the following:

- Focus resources on the early grades to build a solid foundation for later learning;
- Tailor professional development to the particular needs of students in each school; and
- Focus on the social-emotional needs of students that research shows have long-term positive impacts on student outcomes.

QEM 1999 REPORT

[This is the original QEM report](#) which describes the key elements and components of a quality education as reflected in the Quality Education Model. Its key recommendations are:

- Targeted reductions in class sizes, particularly in the early grades;
- Provide more professional development for teachers and principals;
- Provide more instruction time, particularly for struggling students;
- Do more community outreach to promote more parent and community involvement; and
- Provide more instructional support so the benefits of good instruction are maximized.

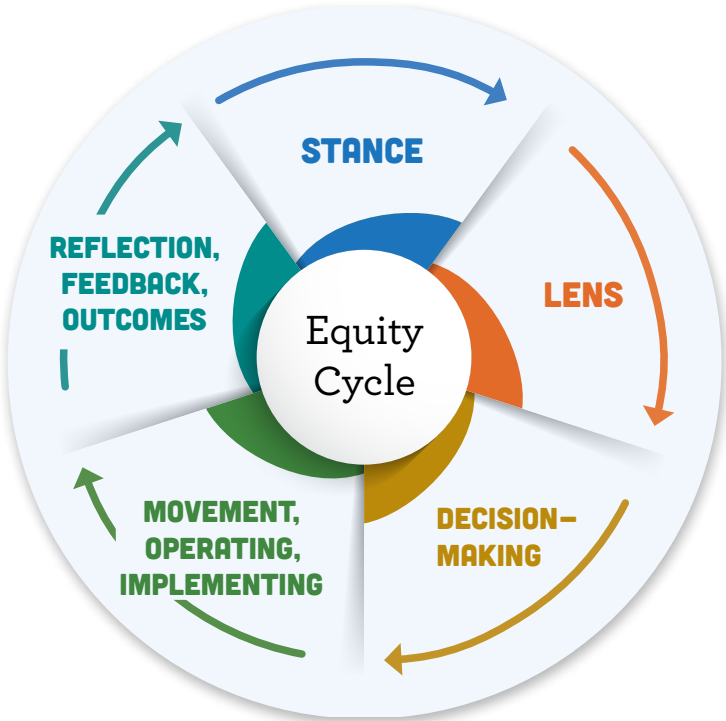
APPENDIX E: EQUITY LENS AND TOOLS

EQUITY PRACTICES AS CONTINUOUS PRACTICES

Equity tools are best utilized in continuous cycles that include:

- 1. An equity stance:** Core values, commitments, orientations, principles, strategies, and frameworks that your district, organization, school, or team has decided are foundational to what you wish to prioritize in decision-making.
- 2. An equity lens:** An active tool that supports core values, commitments, orientations, and questions to become *operationalizable*. An equity lens must support navigating choices in the *here and now*. It helps translate theory into practice, focuses on assets rather than deficits, and avoids making decisions that could marginalize or harm students, staff, families, and communities. An equity lens could also include:
 - a. Facilitation Tools or Protocols:** Possible protocols (such as a consultancy protocol) to use the equity lens in a facilitated space or discussion.
 - b. Decision-making Tools or Protocols:** Possible tools (such as the ODE decision tools or consensus tools like Fingers to Five) that help guide decision-making based on the questions and framework in the equity lens.
- 3. Implementation:** An equity lens should also guide decisions around the roll-out and operationalization of key equity strategies and activities, and can be used throughout the entire process of implementation.
- 4. Processes for reflection, feedback, and learning:** Throughout the entire cycle and process, teams should consider how reflection, feedback, and learning time and processes are built in to refine the equity stance, lens, and other tools.

Taken together, this cycle and these steps could look like:



THE OREGON EQUITY LENS

The purpose of the Oregon Equity Lens¹¹³ is to clearly articulate the shared goals we have for our state and the intentional investments we will make to reach our goal of an equitable educational system. This equity lens helps educators and decision-makers recognize institutional and systemic barriers and discriminatory practices that have limited student success in the Oregon education system. The equity lens emphasizes underserved students, such as out of school youth, English Language Learners, and students of color with a particular focus on racial equity.

The focus of this equity lens is on race and ethnicity. This is based on an understanding that when we focus on racial disparities as a lens to consider investments for each and every student and community, we can and will generate opportunity and improvement in every area of educational practice and performance. Centering racial equity is rooted in the historical context of Oregon and is the path through which we can heal while targeting areas of action, intervention and investment. The passage of the Student Success Act directly calls upon educators and leaders across the state to act together, with a shared sense of purpose and possibility.

The questions offered below can and should be adapted to ask questions regarding each of the focal groups named in the Student Success Act as being farthest away from opportunity and deserving our collective attention.

1. Who are the racial/ethnic and underserved groups affected? What is the potential impact of the resource allocation and strategic investment to these groups?
2. Does the decision being made ignore or worsen existing disparities or produce other unintended consequences? What is the impact on eliminating the opportunity gap?
3. How does the investment or resource allocation advance student mental or behavioral health and well-being and/or increase academic achievement and address gaps in opportunity?
4. What are the barriers to more equitable outcomes? (e.g. mandated, political, emotional, financial, programmatic or managerial)
5. How have you intentionally involved partners who are also members of the communities affected by the strategic investment or resource allocation? How do you validate your assessment in (1), (2) and (3)?
6. How will you modify or enhance your strategies to ensure each learner and communities' individual and cultural needs are met?
7. How are you collecting data on race, ethnicity and native language?
8. What is your commitment to professional learning for equity? What resources are you allocating for training in culturally responsive and sustaining instruction?

113 The [Oregon Equity Lens](#) was adopted by the Higher Education Coordinating Commission (HECC) in 2014 as a cornerstone to the State's approach to education policy and budgeting. The Equity Lens was originally developed by and adopted by the former Oregon Education Investment Board (OEIB) and was implemented by the Oregon Chief Education Office in addition to the HECC. We encourage applicants to build on this lens using their own needs/goals and the checklist provided in this guidance.

DEEPENING YOUR EQUITY LENS

While the Oregon Equity Lens offers a powerful starting point, we also encourage applicants to consider their unique equity needs, values, and experiences that they wish to center¹¹⁴. To support the development of an equity lens that reflects your district, community, or team's equity stance and needs, we have created a checklist of what an equity lens should address and considerations you may wish to have when developing a lens:

What is your equity stance:

- Can you see throughlines to your equity lens? For example, if your stance is intended to dismantle *structural* and *systemic* racism, how does your lens target deeper levers as well?
- How does it include district wide equity policies, statements, strategic plans?
- Which communities' values and priorities are represented in the equity stance? Which ones might be missing?

What team will be using this equity lens:

- Is the team less experienced with equity and therefore requiring a more prescriptive lens? Or is the team more experienced allowing for the lens to be more adaptive and flexible?
- What make-up (of staff position, demographic, etc.) does the team need to be for the equity lens to be used appropriately?

How does your equity lens address the following:

- Particular regional stories, community make-up, intersectional dynamics, and historic and systemic oppression
- The kinds of identities and demographics that experience marginalization state-wide and in your community, including race, ethnicity, class, gender, and/or sexual orientation, disability/ability, religion, etc.
- Student, family, community and staff assets and strengths
- Current and historical trauma, and the impacts of microaggressions, exclusion, and other forms of psychological harm (using a strengths-based, trauma-informed approach)
- Particular problems, dilemmas, tensions or complexities in your context, including:
 - Levels of access to quality education resources across focal groups and various identities
- Dimensions of power: in decision-making, who is on the team, etc.
- System health, including levels of collaboration and trust
- Community involvement: who is involved in knowledge gathering, sense making, and decision making

What other tools, structures or processes do you need to include, such as:

- Facilitation protocols to structure discussion (like the [SRI Protocols](#))
- Decision-making protocols to clarify roles and process (like the [Fist to Five Voting & Consensus](#) model)
- Structures, timelines or tools for continuous improvement, reflection, and learning














Additional Resources











- [ODE Decision Tools](#)
- [Racial Equity Impact Assessment](#)
- [SRI Protocols](#)
- [Fist to Five Voting & Consensus Decision Making](#)
- [The Non-Profit Association of Oregon Equity and Inclusion Lens Guide](#)














¹¹⁴ For an example of a customized equity lens, see [Lane ESD's Equity Lens](#)














APPENDIX F: ACTIONABLE INPUTS FROM SSA ADVISORIES INTO DISTRICT PLANNING

This unique new planning resource has been developed to cross-reference current Student Success Act Advisory plans and locate them in common categories with specific actions, inputs, or recommendations that applicants are highly encouraged to consider as an input in their planning processes.























Access	
 AABSS Plan  Latino/a/x & I Plan  AI/AN Plan  LGBTQ2SIA+ Plan  EL State Strategic Plan	
	Increase access to advanced placement, International Baccalaureate, and college credit courses.
	Provide affordable and accessible credit recovery and acquisition opportunities quarterly and during the summer months.
	Identify barriers to underserved students' participation in before and after school activities.
	LGBTQ2SIA+ students, students of color, and students with disabilities self-determine ways in which their education can be strengthened with safer, more welcoming, and inclusive environments.
	Provide LGBTQ2SIA+ youth with access to facilities and activities for all genders in K-12 institutions.
	Identify existing and promising practices for the enrollment of underserved students into postsecondary institutions and CTE programs.
	Prepare all English Learner students to be ready with the language and academic skills necessary to access and achieve success in a rigorous curriculum and engage in learning opportunities that prepare them for success in college and multiple career pathways.
	Students have access to quality programs that promote English Language Development, dual language development, and mastery of core subject areas.


















Accountability/Policies	
 AABSS Plan  Latino/a/x & I Plan  AI/AN Plan  LGBTQ2SIA+ Plan  EL State Strategic Plan	
	Revise district policies and procedures to eliminate discipline disparities that push out African American/ Black students.
	Build a consistent approach and aligned pathway between middle school, high school and higher education to promote college enrollment.
	Support the development of culturally responsive (students, faculty, and peer-to-peer) observation forms to inform policy and practices.
	Provide recommendations and guidance to school districts and ODE on best practices for identification of AI/ AN students in early learning, K12, and postsecondary institutions.
	Identify and review district attendance policies with higher numbers of AI/ AN enrollment and the policies impact on AI/ AN students who experience chronic absenteeism.












Accountability/Policies	
 AABSS Plan  Latino/a/x & I Plan  AI/AN Plan  LGBTQ2SIA+ Plan  EL State Strategic Plan	
	Create guidance on promising practices for early learning programs and school districts to implement high-quality, culturally responsive intervention for transition planning at all levels for AI/AN students.
	Support Tribal Consultation between ODE, school districts and federally-recognized tribes in Oregon by expanding capacity for meaningful consultation. OIE will develop and update annually a Tribal Consultation guide for districts.
	Identify and develop school and district policies and investments needed to support culturally specific curricula for Latino/a/x and Indigenous* students.
	Identify and develop opportunities for Latino/a/x and Indigenous* community leadership structure for policy and decision-making.
	Develop community engagement opportunities to review school and district policies related to behavioral health and discipline.
	Develop community engagement opportunities to review school and district policies related to before and after school activities.
	Develop a team of expert practitioners and researchers to guide the development, improvement, and accountability for English Learner program models and practices.
	Monitoring, revising, and recommendation of policies and budget practices to meet the needs of ELs to ODE and OEIB.





























Data/Assessment	
 AABSS Plan  Latino/a/x & I Plan  AI/AN Plan  LGBTQ2SIA+ Plan  EL State Strategic Plan	
	Explore multiple academic assessment measures that gauge achievement of literacy and math proficiency.
	Explore measures of disproportionality in discipline data through relative rate index and risk ratios (This is work currently underway via Accountability through ESSA).
	Administer annual school climate surveys to students and key community partner(s).
	Identify existing practices that cause AI/ AN students to be erased.
	Highlight promising practices of positive identification of AI/ AN students identified through internal review that support increased and accurate numbers of AI/ AN students in early learning, K12 and post-secondary institutions.
	Identify and develop new accountability and progress measures for Latino/a/x and Indigenous* students.
	Develop a data system to monitor EL success as well as program model success across the P-20 educational experience of students (i.e., monitoring success EL students who exited the ELD program, non EL students participating in dual language programs).
	Implement EL assessments and data systems to measure and track success for baseline data. Connect to Kindergarten assessments and statewide assessments used in grades K-12.

Educator/Professional Development	
 AABSS Plan  Latino/a/x & I Plan  AI/AN Plan  LGBTQ2SIA+ Plan  EL State Strategic Plan	
	Support educator preparation and teacher pathways programs aimed at increasing the number of African American/Black teacher candidates, and result in educators who understand Essential Understandings regarding tribes in Oregon. (ABBSS Plan)
	Provide professional development for school district human resources staff and diverse hiring panels to promote culturally responsive/anti-bias hiring practices. (ABBSS Plan)
	Support funding to diversify the educator workforce and improve cultural responsiveness in schools by collaborating with the Teacher Standards and Practices Commission (TSPC) during recruitment phases.
	Increase access to professional development, coaching, training, and technical assistance opportunities for teachers, administrators, and school communities to strengthen educator proficiency across core content areas and effective classroom management techniques.
	Increase access to professional development, coaching, training, and technical assistance opportunities for teachers, administrators, and school communities to provide explicit training on racial, linguistic and culturally responsive/sustainable pedagogy and practice, anti-racism, and social justice.
	Increase access to professional development, coaching, training, and technical assistance opportunities for teachers, administrators, and school communities to create guidance and recommendations that center AI/ AN culture, language and learning across multiple content areas of SB 13. Create recommendations and guidance for districts on oversight and intervention for teachers needing professional development and TA
	Increase access to professional development, coaching, training, and technical assistance opportunities for teachers, administrators, and school communities to provide SB 13 Tribal History/Shared History, Train-the-Trainer trainings to educators.
	Increase access to professional development, coaching, training, and technical assistance opportunities for teachers, administrators, and school communities to understand Oregon laws regarding bias and discrimination on all protected classes and in using trauma-informed practices to support LGBTQ2SIA+ students and students of color.
	Work with culturally specific community-based organizations and community partners to support the development of endorsement programs in education equity.
	Support the development of transparent and streamlined pathways from community colleges to university teacher preparation programs that include practices of transfer pathways and cross sector actions promoted by Career College Collaborative (C3) and the Educator Advancement Council.
	Increase the retention of AI/ AN personnel in schools by creating a support network.
	Realign professional development resources to support student success objectives by prioritizing collaborations that strengthen teacher development, teacher recruitment and teacher retention.
	Set aside funding to support professional development resources for teacher prep programs and accountability.
	Schools encourage educators to increase visible support of LGBTQ2SIA+ students.
	Districts invest in culturally responsive family engagement that support LGBTQ2SIA+ students, and are provided with the guidance and resources to do this well.
	Implement support systems at the school site/building level that promote professional development and academic achievement for English Learners.
	Identify a three to five year professional development plan based on research and teacher input. Seek teacher feed-back regarding effectiveness and applicability of training.
	All new and existing teachers and administrators in Oregon acquire knowledge and strategies regarding English Learners and language acquisition helping them provide students access to academic content regardless of language skills of teacher or students.

Programs/Curricula/Pedagogy	
 AABSS Plan  Latino/a/x & I Plan  AI/AN Plan  LGBTQ2SIA+ Plan  EL State Strategic Plan	
 	Identify and increase the use of culturally responsive pedagogy and practice (develop curricula, content, and instructional materials focused on culture, history, and language) specific to the learning styles and needs of African American/Black, and Latino/a/x and Indigenous* across all grades.
	Increase the amount of culturally specific information, supports, and services available to newly-arrived African/black immigrants regarding their social, emotional, cultural and educational needs at the family level.
	Invest in asset-based, developmentally appropriate discipline and restorative justice practices and implementation.
 	Increase availability and support development of culturally responsive curriculum and engagement in core courses (i.e. racial and ethnic studies) that also foster inclusive classroom environments.
	Implement credit recovery strategies.
	Provide culturally responsive counseling and career services.
	Provide culturally responsive supports and resources for students experiencing inequitable outcomes in academic and social contexts.
	Identify and develop new programmatic efforts and staff supports to ensure successful transitions for Latino/a/x and Indigenous* students entering middle school and high school. (People)
	Implement comprehensive projects that center Tribal Attendance Promising Practices strategies for AI/ AN students. TAPP's efforts are school-wide so all students have the potential to benefit from these strategies.
	Provide support so that AI/ AN students complete transitions efficiently and effectively, including those transitioning between schools. Set aside funds to target AI/ AN transition programs that increase the number of successful transitions for AI/ AN students that are informed by high-quality data.
	Support early identification of AI/ AN student strengths and challenges at critical transition points so students may transition ready to learn and with a cognitive foundation that prepares them for the future through school practices, educational support and research-based experiences that advance total well-being.
	Curriculum adapted for accessibility (accessibility for students and educators who are blind and deaf).
	Create a lesson plan that can be utilized in Early Learning Programs that support the SB 13 Tribal History/ Shared History.
	Identify practice and policy changes to support culturally responsive pedagogy.
	Students experience project-based, hands-on learning experiences through which their identity and lived experience is affirmed and valued.

Family Engagement and Supports	
 AABSS Plan  Latino/a/x & I Plan  AI/AN Plan  LGBTQ2SIA+ Plan  EL State Strategic Plan	
	Increase the amount of culturally specific information, supports and services available to newly-arrived focal student groups regarding their social, emotional, cultural and educational needs at the family level.
	Create access to culturally specific community-based wrap-around supports to guide students and families towards the path to graduation.
	Increase student and family engagement in college and career readiness planning.
	Develop guidance, communication tools and supports for AI/ AN students, families, tribes and communities on identification of AI/ AN students in the K-12 system.
	Set aside funds to support focal student groups family engagement and community involvement opportunities. Identify best practices for improving family, community and tribal engagement.
	Set aside funds to create and expand opportunities for Family Mentoring Programs that will help guide families in improving ways they can recognize their strengths and expand their resilience.
	Develop engagement opportunities with focal student groups and communities to identify new practices related to behavioral health.
	Identify and develop focal student groups leadership development efforts for families and community members.
	Districts invest in culturally responsive family engagement that support LGBTQ2SIA+ students, and are provided with the guidance and resources to do this well.
	Identify and develop engagement opportunities with focal student groups families for college readiness.
	Collect and utilize culturally specific input from parents and the community regarding areas needing improvement, enhancement of program design for English Learners, and how they can support.
	Increase parents attendance of events and trainings as a result of outreach efforts.

Mental Health	
 AABSS Plan  Latino/a/x & I Plan  AI/AN Plan  LGBTQ2SIA+ Plan  EL State Strategic Plan	
	Emphasize strengths-based, health promotion strategies that center their strengths and expand their resilience.
 	Provide access to linguistically and culturally responsive mental health advocates and services for staff, students and families.
	Ensure access to linguistically and culturally affirming and responsive resources, programming and supports for students of color, students with disabilities, and those identifying as LGBTQ2SIA+.
	Collaborate across health, education, county, coordinated care organizations, community and traditional health workers, peer support specialists, and community partners to expand access to mental health supports in and outside of school.
	Provide families, students, and staff with current lists of available mental health services and supports including individual therapy and crisis support services. Ensure that students have access to mental health resources via in-person or telehealth services.

Partnerships	
 AABSS Plan  Latino/a/x & I Plan  AI/AN Plan  LGBTQ2SIA+ Plan  EL State Strategic Plan	
 	Build strategic partnerships with community partners to create a pipeline to a culturally responsive and culturally diverse workforce.
 	Identify and support community advocates to serve as intermediaries with parents, youth and educators to strengthen social capital of focal student groups across Oregon schools.
	Collaborate with resettlement agencies and Oregon’s Refugee Program (DHS) Office, school districts and African/Black community based organizations (CBOs) to provide Accelerated Basic Literacy and Education (ABLE) for families and children for eight months prior to their placements in mainstream schools.
  	Increase in-school advocacy by focal student groups community-based organizations to promote, encourage and remove barriers to school attendance, student engagement/performance and family engagement.
   	Collaborate with culturally specific community-based organizations to provide wraparound services and support to students through youth mentoring and advocacy.
   	Create culturally responsive school, family and community partnerships that strengthen outcomes for focal student groups students and families.
	Develop strategic partnerships with existing after-school academic programs beginning in 9th grade (i.e. tutoring, enrichment, test preparation or other areas of need).
  	Identify best practices for persistence and retention for students including partnerships with culturally responsive community-based organizations to promote student access and success in post-secondary communities.
	Share and disseminate culturally relevant best practices and strategies for closing the opportunity gap for AI/ AN students. Including supporting districts’ collaboration with tribes and cultural organizations to identify and advocate for culturally responsive approaches to increase both attendance and graduation rates.
	Support meaningful community conversations between federally-recognized tribes in Oregon and ODE that lend to strengthened collaborations.
	Continue to support and monitor existing partnership efforts and expand to include additional partnerships to collaboratively develop parent and community engagement strategies.

APPENDIX G: ADDITIONAL GUIDANCE FOR ESSA PARTNERSHIP DISTRICTS

Oregon districts identified for Comprehensive School Improvement or Targeted School Improvement (CSI/TSI) programs using federal funds must follow this additional guidance.

Description of program: The Every Student Succeeds Act (ESSA) requires states to develop accountability models that meaningfully differentiate schools for additional support. As part of Oregon’s commitment¹¹⁵ to strengthen school district systems, ODE engages with school districts to better support schools in need of comprehensive or targeted support and interventions (CSI/TSI). These are referred to as ESSA Partnership Districts.

HOW DISTRICTS ARE IDENTIFIED

Identification of CSI and TSI schools takes a holistic approach by looking at multiple data points called indicators. Those indicators include:

- Chronic Absenteeism
- English Language Arts (ELA)/Math Achievement
- ELA/Math Growth
- English Learner (EL) Progress towards Proficiency
- 9th Grade On-Track
- 4-Year Graduation
- 5-Year Completion

Under the model, each indicator is ranked by levels (1-5). Level 3 represents the state average. Schools identified for Comprehensive and Targeted Supports for Improvement are defined as:

- CSI – Any Title I school with a Level 1 in at least half of the rated indicators and any high school with a four-year graduation rate below 67%.
- TSI – Any school with a specific group of students with a Level 1 in at least half of the rated indicators, which include the four-year graduation rate and five-year completer rate.

[Additional information pertaining to Accountability and School Improvement under ESSA](#) is available alongside [Executive Numbered Memo 002-2018-19](#) further detailing Oregon’s identification and support model.

TIMELINES FOR NEW IDENTIFICATION

In accordance with ESSA, states are required to identify CSI schools once every three years and TSI schools annually. The US Department of Education waived these requirements for the 2019-20 and 2020-21 school year due to the COVID-19 pandemic. ODE will work with currently identified schools and districts to review improvement efforts in order to determine whether or not the identified schools are still in need of additional support. ODE is monitoring requirements from the US Department of Education pertaining to identifying additional schools in the Fall of 2022.

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Allocation of subgrants:

Allocations previously released and still available for claims:

Subgrant Title in EGMS	Subgrant End Date
ESSA Partnerships 19-20 Supplement	9/30/22
ESSA Partnerships 20-21	9/30/22
ESSA Partnerships 22-22	9/30/23

Considerations for spending:

Funds to support CSI / TSI districts are Title IA funds and must be spent in accordance with Title IA rules, which can support a wide range of activities to help Title I-A students meet state academic standards.¹¹⁶ This includes, but is not limited to:

- Providing eligible students with a well-rounded education
- Instructional supports
- Non-instructional supports like behavior and mentoring supports, and social and emotional learning
- Improving school quality
- Activities addressed within the school’s comprehensive needs assessment

Additionally, these funds must adhere to the evidence-based provisions of ESSA. More information pertaining to these provisions can be found in the [Leveraging Evidence-Based Practices for Local School Improvement](#) document.

Finally, activities must be aligned in service to the focal student groups the school and/or district were identified for in terms of needing additional focus and support.

Aligning with integrated planning and budgeting:

Efforts have been made to integrate requirements for ESSA Partnerships with Continuous Improvement Planning (CIP) processes. Where appropriate, the four-year plan developed by the school district¹¹⁷ can include activities aimed at improving experiences and outcomes for focal students and can be documented in the braiding and blending across program resources described in Integrated Guidance.

¹¹⁶ Taken from the [OR Federal Funds Guide](#) (link directly downloads an MS Word resources)

¹¹⁷ For clarity, the four-year plan under the Integrated Guidance is the formal Continuous Improvement Plan (CIP).

APPENDIX H: PROGRAM-BY-PROGRAM DETAILS

This section provides detailed information about the programs included in this guidance with a particular focus on allowable uses of funds.

► HIGH SCHOOL SUCCESS

A. PROGRAM AREAS

Funding is provided to establish or expand programs in three areas:

- Career and Technical Education
- College-Level Education Opportunities
- Dropout Prevention

B. ALLOWABLE USES

In each program area, there are allowable uses to spend HSS funding.

Career and Technical Education: Establish or expand approved Career Technical Education (CTE) Programs of Study in high schools that are relevant to the job market in the district's community or region. Recipients must work with their CTE Regional Coordinator to develop a CTE Program of Study or Start-Up Program.¹¹⁸

This includes, but is not limited to:

- Purchasing equipment,
- Supporting student leadership organizations,
- Constructing facilities, and
- Recruiting, licensing, employing, and training of CTE staff.

College-Level Educational Opportunities: Establish or expand college-level educational opportunities for students in high schools.

This includes three areas:

1. College-level coursework -
 - a. Advanced Placement, International Baccalaureate, or comparable college-level courses; or
 - b. Dual credit and other accelerated college credit programs offered in conjunction with an Oregon community college, public university or other accredited institutions of high learning or post-high school career schools;
2. Assisting students with the selection and successful completion of college-level educational opportunities; and
3. The recruitment, licensing, employment, and training of personnel to provide college-level educational opportunities for students in high schools.

Dropout Prevention: Establish or expand dropout prevention strategies in all high schools. This requirement to implement dropout prevention strategies in every high school is distinct from the other program areas.

¹¹⁸ In order to use HSS funds on CTE programs, they must be approved as either start up or full CTE Programs of Study meeting all state/federal requirements. For more information see p.64 of the CTE Policy Guidebook

This must include:

1. Implementing activities to reduce chronic absenteeism;
2. Establishing and maintaining data management systems that provide timely reports on students' grades, absences, and discipline by school and by course;
3. Beginning with grade 8, using attendance, course grades, credits earned and disciplinary referrals to identify students at risk of not graduating;
4. Beginning in the summer after grade 8, providing academic and social supports for students at risk of not graduating to ensure that the students are on-track to graduate by the time the students enter grade 10 and stay on-track to graduate after entering grade 10, including such supports as:
 - a. Summer programs;
 - b. Additional instructional time before and after school hours;
 - c. Tutoring or small-group instruction during the school day; or
 - d. Counseling services.
5. Providing counseling and coaching to expose students to employment opportunities and requirements and options for post-secondary education.

C. SUPPLEMENT, NOT SUPPLANT

High School Success funds must be used to establish or expand programs, and may not be used to maintain programs, opportunities, or strategies established prior to December 8, 2016. There is an exception: High School Success funds may be used to replace the loss or expiration of time-limited grants or federal funds.

D. SPENDING PERCENTAGES

Every recipient— regardless of funding level— has the option to use funding to support all three program areas. Recipients that receive lower levels of funding have some flexibility to spend in fewer program areas, if they choose. This requirement is based on the funding the recipient receives in the first year of the biennium.

Funding Level during the first year of the biennium	Programmatic Area
Less than \$100,000	Up to all three, but at least one
More than \$100,000 but less than \$350,000	Up to all three, but must address CTE and one of the other two
More than \$350,000	Must address all three

E. FUNDING STUDENTS IN EIGHTH GRADE

Recipients may use up to 15 percent of their HSS funds (after deducting allowable administrative costs) to support programs, opportunities, and strategies for students in eighth grade. All other spending must be for students in grades 9-12.

F. ADMINISTRATIVE COSTS

Recipients may use up to four percent of funds for administrative costs directly related to the activities funded under HSS. For the purposes of HSS funds, administrative costs are synonymous with indirect costs. If recipients use administrative costs, they must conduct an annual analysis of:

- Student attendance in grades 9 through 12; and
- Disciplinary referrals, suspensions and expulsions in grades 9 through 12 disaggregated by race and ethnicity.

▶ STUDENT INVESTMENT ACCOUNT

A. PROGRAM AREAS

There are five allowable use areas:

- Increasing Instructional Time
- Addressing Student Health and Safety
- Reducing Class Size
- Expanding Availability of and Student Participation in Well-rounded Learning Experiences
- Ongoing Community Engagement

Within the allowable use areas, the law provides significant flexibility, but a district must demonstrate how a proposed expenditure:

1. Meets the specific goals of the Student Success Act;
2. Is incorporated into one of the allowable use areas;
3. Contributes to meeting the required Longitudinal Performance Growth Targets; and
4. Is informed by community engagement including focal student groups and families, needs assessment, and equity lens.

B. ALLOWABLE USES

Grantees can spend funding in one or more of the following categories:

- Increasing instructional time, which may include activities such as:
 - More hours or days of instructional time;
 - Summer programs;
 - Before-school or after-school programs; or
 - Technological investments that minimize class time used for assessments administered to students.
- Addressing students' health or safety needs, which may include:
 - Social-emotional learning and development;
 - Student mental and behavioral health;
 - Improvements to teaching and learning practices or organizational structures that lead to better interpersonal relationships at the school;
 - Student health and wellness;
 - Trauma-informed practices;
 - School health professionals and assistants; or
 - Facility improvements directly related to improving student health or safety.
- Reducing class sizes , which may include increasing the use of instructional assistants, by using evidence-based criteria to ensure appropriate student-teacher ratios or staff caseloads.

- Expanding availability of and student participation in well-rounded learning experiences, which may include:
 - Developmentally appropriate and culturally responsive early literacy practices and programs in prekindergarten through third grade;
 - Culturally responsive practices and programs in grades six through eight, including learning, counseling and student support that is connected to colleges and careers;
 - Broadened curricular options at all grade levels, including access to: art, music, physical education, science, technology, engineering, mathematics, CTE, electives, accelerated college credit programs, dual credit programs, International Baccalaureate programs, advance placement programs, dropout prevention programs, transition programs (including Kindergarten transition programs), life skills classes, or talented and gifted programs
 - Access to licensed educators with a library media endorsement
- Ongoing community engagement

C. BUILDING, EXPANDING, OR MODIFYING FACILITIES

Facility improvement directly related to improving student health or safety are allowable. However, beyond that, whether SIA funds can be used to build or expand facilities hinges on several variables. In order to be considered an allowable use of SIA funds, the SIA application would need to:

1. Identify how building, expanding, or modifying facilities meets the intent of the SIA,
2. Describe community engagement and input that elevates the need to build or expand facilities,
3. Articulate how an equity lens was applied in choosing this strategy to address equity-based disparities of student outcomes, and
4. Provide the context to show there is a true lack of space to execute the strategy and that building or expanding facilities is necessary to implement the strategy.

D. PRESCHOOL

The use of SIA funds to expand preschool/ pre-kindergarten programs is not allowable. However, the use of SIA funds for Kindergarten Transition programs is allowable based on this memo with more guidance. ODE staff reviewers will rest their assessment on a district's ability to address these variables in their SIA application.

E. UNIVERSAL CLASS SIZE REDUCTION

Universal class size reductions are not allowable under the SIA. Class size reductions must be targeted or focused by using evidence-based criteria to ensure appropriate student-teacher ratios or staff caseloads. For example, reducing K-3 classes would be allowable whereas reducing K-12 classes would not be allowable with SIA funds.

F. SUPPLEMENT, NOT SUPPLANT

The Student Investment Account does not have a supplement, not supplant provision.

G. SPENDING PERCENTAGES

The Student Investment Account does not have requirements around spending percentages.

H. ADMINISTRATIVE COSTS

A grant recipient may use funds for administrative costs, including indirect costs, directly related to allowed expenditures as provided in the grant agreement. Administrative costs for SIA Funds are limited to 5 percent of the total expenditures, or \$500,000, whichever is less regardless of rates for other funding streams. Any administrative costs incurred by participating charter schools must be accounted for within the sponsoring school district's overall limit of 5 percent or \$500,000, whichever is less.

► **ESSA PARTNERSHIP GRANTS**

A. PROGRAM AREAS

ESSA Partnership Grants are provided to districts with identified Comprehensive Support and Intervention (CSI) or Targeted Support and Intervention (TSI) schools. The funds are intended to support improved outcomes for focal students.

B. ALLOWABLE USES

ESSA Partnership Grant are Title I-A funds and must be spent in accordance with Title I-A rules. These rules allow funding to support a wide range of activities to help Title I-A students meet state academic standards (taken from the OR Federal Funds Guide). This includes, but is not limited to:

- Providing eligible students with a well-rounded education.
- Instructional supports.
- Non-instructional supports like behavior and mentoring supports, and social and emotional learning.
- Improving school quality.

These funds must adhere to the evidence-based provisions of the Every Student Succeeds Act. Refer to the Leveraging Evidence-Based Practices for Local School Improvement document for additional information.

Activities must be aligned in service to the focal student groups that the school and/or district identified as needing additional focus and support.

C. SUPPLEMENT, NOT SUPPLANT

Districts must assure that each school the district serves with section these funds will receive all of the State and local funds it would have received in the absence of the ESSA Partnership funds.

D. SPENDING PERCENTAGES

ESSA Partnership Grants do not have spending percentages.

E. ADMINISTRATIVE COSTS

Administrative costs are not allowed for these funds.

► PERKINS V – CTE

A. PROGRAM AREAS

The purpose of Perkins funds is to develop more fully the academic knowledge, technical skills, and employability of secondary and postsecondary students who elect to enroll in CTE Programs of Study. CTE Programs of Study are offered in grades 9-12 and community college pre-baccalaureate programs. Perkins funds are primarily for use to support CTE Programs of Study, but can also be used for career exploration and guidance down to middle school and transitions into postsecondary training.

B. ALLOWABLE USES

For local grant recipients, Perkins has a number of allowable uses of funds related to improving CTE Programs of Study and/or career guidance activities supporting recruiting students as well as transitioning students to and from a CTE Program of Study:

- Develop, coordinate, implement, or improve career and technical education programs to meet the needs identified in the comprehensive needs assessment
- Provide career exploration and career development activities through an organized, systematic framework
- Provide professional development for teachers, faculty, school leaders, administrators, specialized instructional support personnel, career guidance and academic counselors, or paraprofessionals
- Provide within career and technical education the skills necessary to pursue careers in high-skill, high-wage, and in-demand industry sectors or occupations
- Support integration of academic skills into career and technical education programs and Programs of Study
- Plan and carry out elements that support the implementation of career and technical education programs and Programs of Study and that result in increasing student achievement of the local levels of performance
- Develop and implement evaluations of the activities carried out with funds

Allowable Costs/Activities (*requires special pre-approval)

- *CTE interest, aptitude and ability inventories
- *CTE related software
- *Marketing and outreach activities related to specific CTE Programs of Study
- *Membership dues/fees to a professional
- *Repair of equipment if the cost of the repair is of greater benefit than upgrading to new industry grade equipment. The recipient is obligated for general equipment repair and maintenance.
- *Working lunch at CTE meeting with high burden of proof
- Costs associated with expansion of CTE Programs of Study into work-based learning
- Career and Technical Student Organization (CTSO) expenditures for newly chartered CTSO programs, 0-3 years
- CTSO expenditure for re-birth of CTSO programs or a new teacher to a CTSO program, 0-2 years
- Curriculum development/modification within a CTE Program of Study
- Curriculum expansion or supplemental resources, 0-3 year investment
- Equipment and upgrade to meet industry standards
- Expenditures for CTE career exploration and awareness down to the middle grades, including grades 5-8
- Meeting and conferences (registration fees, travel costs) related to CTE Programs of Study
- Organization that is embedded in a conference or professional development deliverable
- Professional development costs for CTE personnel
- Professional development related to CTE for non-CTE teachers/faculty/counselors involved in CTE initiatives such as advising, academic and technical integration, and career awareness.
- Professional services costs (consultants)
- Subscriptions to industry based software of resources
- Substitute pay for teachers, activities, and staff development related to CTE
- Supplemental support services for Perkins special populations
- Transportation costs incurred through professional development activities associated with approved CTE Programs of Study

Unallowable Costs/Activities

- Administration costs above the 5% cap
- Alcoholic beverages
- Alumni activities
- Basic classroom furniture and supplies
- Building maintenance and repairs
- Bus or Metro Transport pass
- Child care
- College credit to an individual student, teacher or instructor
- Commencement and convocation costs
- Construction, renovation and/or remodeling of facilities
- Consumable supplies
- Contributions and donations
- CTSO competitions
- CTSO expenditures to programs that are fully established
- CTSO uniforms
- Custodial services
- Entertainment, amusement and social activities including sports tickets
- Expenditures for career education unrelated to an approved CTE Program of Study
- Expenditures for non-approved CTE Programs of Study
- Expenditures that supplant
- Fines and penalties
- Food, beverages, snacks and meals for meetings and professional development
- Fundraising costs
- Gifts and gift cards
- Goods or services for personal use (e.g. laptop, phone, tablet)
- Individual awards, recognition, trophies, etc.
- International travel
- Items for young children even in early childhood education program
- Items retained by students
- Landscaping
- Licensure/exam fees for student/teacher
- Membership dues for a professional organization not embedded in professional development
- Monetary awards
- Non-instructional furniture
- Political activities, contributions, lobbying, etc
- Promotional materials (e.g. t-shirts, pens, cups)
- Remedial courses
- Routine operating expenses
- Safety equipment
- Scholarships
- Student direct assistance for tuition, car repair, fees, transportation etc.
- Student stipends
- Subscriptions to periodicals, journals and newspapers
- Teacher salaries
- Textbooks, toys, games
- Tuition

C. SUPPLEMENT, NOT SUPPLANT

Perkins V Sec 211(a) Funds made available for CTE activities shall supplement, and shall not supplant, non-federal funds expended to carry out career and technical education services.

D. SPENDING PERCENTAGES

There are no spending percentage requirements as in other programs. However, only 20% of the grant award amount will be available between July 1 and October 1 each year. The remaining 80% will be made available after final award announcements are made from the US Department of Education.

E. ADMINISTRATION COSTS

Regardless of negotiated indirect rate, the total direct and indirect administrative costs cannot exceed 5% of the grant award.

▶ EARLY INDICATOR INTERVENTION SYSTEM (EIIS)

A. PROGRAM AREAS

Grant funding is provided to support implementation of cohesive EIIS systems that include these elements:

- Active staff teams at school and district level
- Robust framework of supports and interventions
- Program innovation and improvement
- Student, family, and community engagement
- System for indicator data collection and analysis such as predictive analytics to identify supports for students and areas for improvement
- Integrated elements, connections across grade levels and schools, and alignment with other ODE initiatives— including the Student Investment Account, Continuous Improvement Plan, High School Success, or Every Day Matters— to identify areas of improvement and support students.

B. ALLOWABLE USES

EIIS grant funding is allowed to be spent in the following six areas. Recipients may choose to use funds in one, several, or all areas.

1. System software purchases and subscriptions
 - a. Software that provides reliable, easily accessible data that identifies student progress toward graduation in multiple dimensions, including student attendance, engagement in learning, and learning outcomes (grades, standardized test scores), as well as additional indicators and influencers of student success, including student empathy interviews, social-emotional well-being surveys, health and mental health supports, and opportunity for enrichment activities.
2. Staffing to maintain the system and facilitate corrective action
 - a. District or school staff who lead overall EIIS, manage the data system, make data available to the data team, lead the data team, provide direct support to students and families, and/or lead partnerships with community organizations related to activity of the EIIS.
3. Training for staff to maintain and use the system with fidelity
 - a. Related to staff learning and the development of equity-centered data analysis skills, increasing capacity for the data team or professional learning community, student-centered learning supports, increasing partnerships with families and students, developing culturally supportive and sustaining instructional strategies, or increasing the understanding of students, their families, and cultures.
4. Data analysis and research
 - a. Staff or other costs related to equity-centered analysis of a district or school's local student learning and participation data, including non-traditional and locally collected data.
 - b. Activities and processes that assist the district or school to analyze data from the EIIS implementation in order to apply.
5. Tribal government consultation
 - a. Related to developing strong relationships with local tribal governments and communities.
6. Student, family, staff, and community engagement
 - a. Initiatives and programs that authentically engage students and families in aspects of the EIIS.
 - b. Activities and events that build capacity for students, families, and the community to participate in EIIS, such as parent learning events about navigating the school system

C. SUPPLEMENT, NOT SUPPLANT

EIS funding may be used to establish new programs, as well as to expand or extend existing programs. EIS does not have a supplement, not supplant provision: EIS funds may be used for expenses related to implementing the EIS that were previously funded through a different source.

D. SPENDING PERCENTAGES

Recipients may choose to use funds in one, several, or all areas.

E. ADMINISTRATIVE COSTS

Districts cannot claim an administrative cost or indirect cost related to the EIS funds.

APPENDIX I: DETAILED GUIDANCE ON LONGITUDINAL PERFORMANCE GROWTH TARGETS (LPGTs)

DETAILED GUIDANCE FOR SETTING LONGITUDINAL PERFORMANCE GROWTH TARGETS

WHAT'S REQUIRED

[ORS 327.190](#) states that ODE shall collaborate with eligible applicants in the development of applicable Longitudinal Performance Growth Targets (LPGTs) and that these targets must:

Longitudinal Performance Growth Targets and that these targets must:

- Be based on data available for longitudinal analysis
- Use the “common metrics”
- Include overall rates and be disaggregated
- Allow for any locally defined metrics an applicant may include in their plan

It is important that applicants and ODE co-develop and build a framework for monitoring and evaluation that supports variance in needs and investment and reflects system improvement and growth over time.

Longitudinal Performance Growth Targets must apply to the applicant as a whole and to the following student focal groups, which have historically experienced academic disparities:

- Student navigating poverty, homelessness, and foster care
- Students with disabilities
- Emerging Bilingual students
- American Indian/Alaska Natives
- Black/African Americans
- Hispanic/Latinos
- Native Hawaiian/Pacific Islanders

Applicants may also choose to identify additional student groups to which targets apply.

COMMON METRICS - LONGITUDINAL PERFORMANCE GROWTH TARGETS:

1. [Four-year Graduation](#): The percentage of students earning a regular or modified diploma within four years of entering high school.
2. [Five-year Completion](#): The percentage of students earning a regular, modified, extended or adult high school diploma, or a GED within five years of entering high school.
3. [Third Grade Reading](#): The percentage of students proficient on statewide English Language Arts (ELA) assessments in 3rd grade.
4. [Ninth Grade On-Track](#): The percentage of students earning at least one-quarter of their graduation credits by the end of the summer following their 9th grade year.
5. [Regular Attenders](#): The percentage of students attending more than 90 percent of their enrolled school days.

SUBMITTING LPGTs WITH THE INTEGRATED APPLICATION

Longitudinal Performance Growth Targets are not formally part of the application and will not be reviewed in determining if application requirements are met. ODE requests that applicants share their drafted LPGTs at the point of application submission so that when an application is determined to meet requirements both parties can move quickly into the “co-development” phase of work to set LPGTs.

RECOMMENDED STEPS FOR LPGT DEVELOPMENT

Each of the following steps are outlined to support applicants in preparing their submission to ODE:

Step 1: Reflect and Review

Step 2: Examine Disaggregated Data

Step 3: Complete Growth Target Worksheet, including:

- Set Long-Term, Five Year Targets
- Set Baseline and Stretch Targets
- Set Gap Closing Targets for Focal Student Groups

STEP ONE: REFLECT AND REVIEW

Reflecting on your own local understanding data, student performance, and how you hope your plans and investments will bring benefits to students is the place to begin.

- What does the data bring to life? What might be missing?
- What principles can and should guide your setting of these LPGTs, now?
- Where do you want to be in five years? (this is your five-year target)
- How will you get there?
- Have you made the right investments to reach the gap closing targets you are setting?

ODE offers the following general guidelines and information to review as you get started.

GENERAL GUIDELINES

Each applicant should consider its own data and trends, as well as the programs that will be implemented with SIA, HSS, CSI/TSI, EIS, and Perkins (CTE) funds.

There is no single formula for setting these targets as investments in programs and interventions will vary from district to district.

Five-year targets should be based on:

- The applicant’s historic trends for that metric;
- An evaluation of the likely impact of new or expanded programs on that metric; and
- Statewide averages and trends.

ODE strongly recommends setting realistic and attainable targets. The table below shows the growth that the top ten percent of districts achieved or exceeded from 2013 to 2018. Average yearly growth at this pace represents a significant achievement. As you work to set realistic, attainable targets, ODE recommends you use this table to help you consider what might inform ambitious targets. Growth projected at rates higher than these percentages is likely to be unrealistic. Consider also your district’s plan for COVID recovery and any deviations from your usual trend that may have occurred as a result of COVID and the resulting instructional shifts.

Indicator	Yearly Growth Achieved by 10% of Districts
Regular Attenders	1.2
3rd Grade ELA	3.4
9th Grade On-Track	5.4
4-year Graduation	4.2
5-year Completion	2.6

CONSIDER STATE AND DISTRICT TRENDS

In order to set LPGTs it is instructive to consider the recent history of these metrics in Oregon. The goal is to provide some state context around achievable long term targets and ambitious and achievable yearly growth targets.

Here is an example of district data prior to COVID-19 impacts. These numbers are chosen in order to demonstrate a range of circumstances and considerations for setting targets. In general:

- Applicants, especially those below statewide averages, should strive to match or exceed statewide progress, and not to see a decline in indicators.
- Applicants at the very high end of achievement might expect less or slower growth, or perhaps to hold steady and see maintenance at these levels as a signal of excellence.
- Expecting growth above the “High” values outlined below may produce an unachievable target for districts.
- New programs or investments don’t always impact metrics immediately; we expect growth to accelerate over time. This means intermediate targets may rise slowly at first.

Indicator	2014-15	2015-16	2016-17	2017-18	2018-19	5-year Average	5-year Trend	State Average	State Trend
Regular Attenders	87.7	86.3	84.7	82.9	86.6	85.6	(0.5)	80.7	(0.6)
3rd Grade (ELA)	36.9	32.7	30.2	35.3	35.9	34.2	0.1	47.5	(0.2)
9th Grade On-Track	62.5	63.5	74.0	78.3	87.8	73.2	5.5	83.8	1.0
4-year Graduation	56.1	65.9	65.5	64.1	71.5	64.6	2.4	76.1	1.4
5-year Completion	79.1	75.1	78.9	80.5	81.4	79.0	0.8	83.4	0.6

When combined with the applicant’s own five-year trends and specific programs of implementation, the above guidelines can help applicants develop Longitudinal Performance Growth Targets for all students over five years.

WHY PAY ATTENTION TO THE TREND?

Individual applicants show a range of trends. The “trend” column is an indication of the typical year-to-year increases or decreases for each of the metrics. These are five-year trends so, for instance, one should note that the majority of the 9th grade on-track increase happened between years one and two, while most of the increase in five-year completion rates occurred in the last two years of data.

STEP TWO: EXAMINE DISAGGREGATED DATA

ODE will provide suppressed and unsuppressed data to applicants by January 2023 to support applicants in drafting LPGTs. It's important to note that data for the five common metrics has been significantly impacted by COVID-19 over the past two school years. ODE plans to release data for five years spanning from 2015-16 to 2019-20. Applicants are asked to examine the data provided as an input by ODE for your consideration in setting your own growth targets.

A NOTE ON SUPPRESSED DATA

Where the number of students (n) is 10 or fewer in any group, ODE will provide this information in a format that is both suppressed and unsuppressed. To protect the privacy of students, unsuppressed information will be for district internal use only. Only suppressed information should be used when presenting this information in any public setting.

STEP 3: COMPLETE A GROWTH TARGET WORKSHEET

Completing the [ODE provided worksheet to develop LPGTs](#) can help applicants identify questions, get support, and make any adjustments ahead of submitting their draft Longitudinal Performance Growth Targets as part of their application.

SET LONG-TERM, FIVE-YEAR TARGETS

Applicants will set long-term, five-year targets for each of the five metrics.

Four-Year Graduation					
District-Wide					
	Year 1 2023-24	Year 2 2024-25	Year 3 2025-26	Year 4 2026-27	Year 5 2027-28
Stretch Target					
Baseline Target					
Focal Student Groups					
	Year 1 2023-24	Year 2 2024-25	Year 3 2025-26	Year 4 2026-27	Year 5 2027-28
Gap Closing					

SET BASELINE AND STRETCH TARGETS

Applicants will set “baseline” targets – or the minimum growth they would be satisfied to meet or maintain over that five-year period.

Baseline targets are not formulaic, they should be based on:

- The applicant’s historic trends for that metric; and
- An evaluation of the likely impact of programs on that metric

Applicants will also set the higher end of the range which is called a “stretch” target - an ambitious achievement target. While ambitious, this “stretch” target is also realistic.

Stretch targets represent significant improvement by the district in either:

- Raising academic achievement; or
- Reducing academic disparities and closing gaps

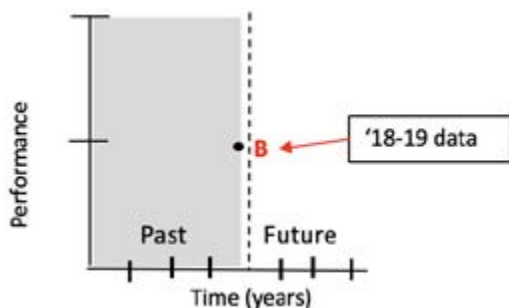
An example of baseline and stretch targets are shown in this appendix to illustrate the concept. The baseline and stretch targets are defined below:

- A baseline target represents the minimum expectations for progress
- A stretch target represents significant improvement and goes beyond prior expectations

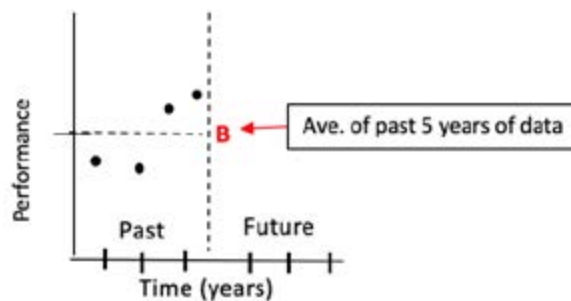
WHERE TO START?

For the purposes of Longitudinal Performance Growth Target setting, three options are suggested for determining your starting points. Each is illustrated below and includes setting targets:

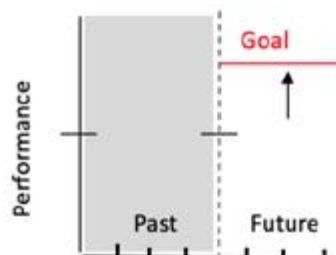
- **Option 1:** Based on previous year’s performance



- **Option 2:** Using the average of previous years of performance



- **Option 3:** Unrelated to prior data and past performance



STEP THREE: SET GAP-CLOSING TARGETS FOR FOCAL GROUPS

The purpose of the “Gap-Closing Targets” is for applicants to set targets and monitor the reduction of academic disparities between groups of students, especially for focal student groups. An achievement gap can be calculated in a number of ways, and for a number of purposes. When setting gap-closure targets we encourage districts to consider the following gaps:

- Within-district gap between the focal group and the applicant student population as a whole (e.g., Group A at the district level compared to all students in the district).
- Within-state gap between focal groups for the applicant and the statewide student population as a whole (e.g., Group A at the district level compared to all students in the state, or to Group A at the state level).

The reasoning is that a district can average high performance in one or all common metrics and still have significant gaps in some or all focal groups.

Another consideration is that a district can have small achievement gaps amongst student groups, but

collective performance could remain very low compared to the state average. In those situations it might be best to work to raise achievement toward state averages.

Gap-Closing Targets, while a single set of targets, are used for all focal groups meeting the minimum n-size requirement. The group of focal targets, while each group has different needs and strengths, allows for a projection that can put a central focus not just on achievement, but on closing gaps in academic disparity.

FINAL NOTES

The approach to setting LPGTs presented in this guidance has its strengths and will reveal areas for improvement. We hope that this approach:

- Meets the requirements, yet acknowledges that the future is difficult to predict.
- Creates the conditions for districts to really think about their local plans and consider the expectations of their community partners.
- Provides flexibility of districts to adapt targets to their individual plans.
- Does not create undue burden through the creation of page after page of targets.
- Creates a simpler system that still highlights those focal groups that are experiencing the greatest academic disparities.
- Eliminates the confusion of setting or not setting targets individually for small groups of students.
- Creates the most flexibility for districts to respond to the variance of differing demographics while keeping a focus on closing opportunity and achievement gaps.

As a final note, while these Longitudinal Performance Growth Targets will be required, they should not be the main focus of the application. Too often in the past the state and federal systems have incentivized “chasing the numbers” at the expense of continuous improvement and thoughtful implementation of policies and programs.

KEEP THE CONVERSATION GOING

Consider how you might share and discuss your draft work with your leadership teams, community, student groups, and governing board. While this information can be complicated to communicate due to the technical and complex nature, we encourage you to share the big picture. This might include explaining Longitudinal Performance Growth Targets, a snapshot of data for each metric and focal student group population, an explanation of progress markers and how you'll track progress year over year, and most importantly what they can do to stay involved.

Our hope is that setting a reasonable range of expected improvements, rather than a single, fixed target, will leave the focus where it belongs: improving the lives and outcomes of Oregon’s students.

PRESENTATIONS AND RESOURCES

ODE has previously shared webinars and slides related to LPGT development in 2019. They are provided here as additional resources, as helpful.

LPGTs [webinars](#)

- Setting Longitudinal Performance Growth Targets [Webinar 1: The Process](#)
 - Webinar 1 [Slides](#)
- Setting Longitudinal Performance Growth Targets [Webinar 2: Deeper Dive](#)
 - Webinar 2 [Slides](#)
- Longitudinal Performance Growth Targets [Workshop](#)
 - Workshop [Slides](#)

APPENDIX J: GLOSSARY OF KEY TERMS

The purpose of this Glossary is to help applicants in understanding terminology used throughout the Integrated Guidance, especially technical terms that require specific definitions for the purpose in which they are used here. The Glossary provides definitions and/or explanations of key terms used and is arranged in alphabetical order.

ACTIVITIES: Concrete plans, actions, or investments that are oriented to smaller steps or shorter time-frames within the arc of a given strategy or set of strategies

ALIGNED PROGRAM CONSORTIA: Two or more eligible grant recipients (districts, charter schools, Oregon School for the Deaf, and/or YCEPs/JDEPs) that apply for joint funding and implement through a joint grant agreement the programs covered in this guidance. When this kind of consortium is formed, each party is agreeing to operate in full alignment with shared fiscal responsibility, where multiple entities do one engagement, application, budget, etc., that are all completed together. One entity is named as the lead to assist in financial and programmatic monitoring and reporting.

CAREER CONNECTED LEARNING: Career Connected Learning is a continuum of awareness, exploration, preparation, and work experience developed through strong public and private partnerships. Participants develop, apply, and are assessed on academic, technical, trade, and entrepreneurial skills that support their future career success.

COMMUNITY-BASED ORGANIZATIONS (CBOs): CBOs are driven by and representative of a community or a significant segment of a community and work to meet community needs and amplify strengths.

CULTURALLY RESPONSIVE: means the implicit recognition and incorporation of the cultural knowledge, experience, and ways of being and knowing of students in teaching, learning and assessment. This includes identifying, valuing, and maintaining high commitment to: students' cultural assets in instruction and assessment; diverse frames of reference that correspond to multifaceted cultural perspectives/experiences; and behaviors in the classroom that can differ from White-centered cultural views of what qualifies as achievement or success.

CULTURALLY SPECIFIC ORGANIZATION: means an organization that serves a particular cultural community and is primarily staffed and led by members

of that community; these organizations demonstrate: intimate knowledge of lived experience of the community, including but not limited to the impact of structural and individual racism or discrimination on the community; knowledge of specific disparities, barriers or challenges documented in the community and how that influences the structure of their program or service; commitment to the community's strength-based and self-driven thriving and resilience; ability to describe and adapt their services to the community's cultural practices, health and safety beliefs/practices, positive cultural identity/pride, religious beliefs, etc.

DISAGGREGATED DATA: Data that has been divided into detailed categories such as, but not limited to, geographic region, race, ethnicity, English fluency, disabilities, gender, socioeconomic status, etc. It can reveal inequalities and gaps between different categories that aggregated data cannot. The accuracy and quality of this data is also dependent on data collection, analysis and decision-making practices that may be biased towards the values of the dominant, White-centered education system, and therefore require critical reflection on whether focal group issues are truly emerging through the disaggregated data and how intersecting categories compound various issues and dynamics.

DISBURSEMENT: allows for an EGMS claim to receive a percentage of funds in advance of expenditure.

DISPROPORTIONATE: refers to unequal or inequitable differences in access and outcomes that historical and current-day White supremacy has created between certain families, children and students based on race, gender/gender identities, sexual orientation, and other discriminating factors. What is "proportionate" must also be critically analyzed and addressed in terms of its values, intent, and ideology.

EVIDENCE-BASED: refers to forms of validation that do not just stem from dominant educational research but include community-driven, indigenous, tribal, culturally-responsive/sustaining/specific, non-

dominant and non-Western ways of knowing, being, and researching. Instructional practices, activities, strategies, or interventions that are “evidence-based” should not just privilege scientific evidence, but also be driven by evidence stemming from the perspectives of those affected by those practices, activities, strategies, or interventions.

OPPORTUNITY GAP: refers to the effects, system biases, and disparities the dominant, White supremacist system and culture has historically, currently, and intentionally created for students. Factors such as race, ethnicity, socioeconomic status, English proficiency, geography, financial wealth, gender, sexuality, familial situations, and disabilities determine or constrain what opportunities the system offers and how these affect their educational aspiration, achievement, and attainment. These effects and disparities represent a system bias and an educational debt that the dominant educational system owes to marginalized students, which necessitate the need to address and shift the system itself.

OUTCOMES: the changes in health, behavior, actions, attitudes, or policies that impact students, educators, people, groups and organizations with whom your work is in relationship with.

PARTNERSHIP: means a group of organizations, tribes, districts or individuals who agree to work together with a common interest and shared vision. In a partnership, there is a high level of trust and two-way communication, and differences in power and privilege are addressed. Roles and responsibilities on all sides are well-defined and developed with shared authority in decision making. There might be shared space and staff, with expectations and agreements in writing.

PLAIN-LANGUAGE: (also called plain writing or plain English) is communication your audience can understand the first time they read or hear it.

REIMBURSEMENT: when claims are made following expenditure.

RESOURCES: Resources are defined as people, time, and money. State and federal funds are key resources. Diversity of funding and resources can be leveraged to animate and execute plans and strategies to meet outcomes.

SOCIAL EMOTIONAL LEARNING (SEL): The process through which children and adults learn to pay attention to their thoughts and emotions, develop

an awareness and understanding of the experience of others, cultivate compassion and kindness, learn to build and maintain healthy relationships, and make positive, prosocial decisions that allow them to set and achieve their positive goals.

STRATEGIES: support your long-term outcomes and describe the approach you are planning to take. Strategies are typically implemented in one to three (and sometimes more) years. They may include a theory of action framework and consider resources, context, people and timelines.

SUPPLANT: meaning replace a prior existing use of a different fund source.

SUPPLEMENT: meaning it comes in addition to and is expected to be used in addition to existing resources.

TRAUMA-INFORMED: Trauma-informed principles and practices refer to a strengths-based, person-centered framework that recognizes the physical, psychological and emotional impacts of trauma, and prioritizes creating safe spaces to promote healing. It recognizes and honors the inherent strengths, resilience and funds of knowledge within each person, and works to increase awareness of how these assets can be accessed, within the trusting spaces of human relationships, to promote healing and flourishing.

UNDERSERVED: refers to communities, groups, families and students that the dominant or mainstream educational system has historically and currently excluded, impacted, marginalized, underserved and/or refused service due to institutionalized and intersectional racism and systemic oppression. This includes students of color, tribal students, English language learners, LGBTQ2SIA+ students, students experiencing and surviving poverty and homelessness, students with disabilities, women/girls, and students from rural communities.

UNDERREPRESENTED: refers to communities, groups, families and students that due to systemic barriers and intersectional oppression have been excluded and limited proportionate access to the dominant or mainstream educational system despite efforts to participate. This includes students of color, tribal students, English language learners, LGBTQ2SIA+ students, students experiencing and surviving poverty and homelessness, students with disabilities, women/girls, and students from rural communities.



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SECTION 6: MEANINGFUL REPORTING, MONITORING, AND EVALUATION PROCESSES



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SECTION 6: MEANINGFUL REPORTING, MONITORING, AND EVALUATION PROCESSES

Section Snapshot

This section describes an integrated approach to reporting, monitoring, and evaluation of impact and performance across the six aligned programs. This includes attention to local optional metrics, the skilled use of early indicator and intervention systems, meeting state CTE Perkins Performance Targets, working with progress markers, developing and finalizing Longitudinal Performance Growth Targets, and quarterly and yearly reporting. The responsibility and opportunity to share a performance review back to your community and board, revisiting if investments reached outcomes you were aiming for, is outlined. This section also includes information about the auditing steps required only under the Student Investment Account.

ODE'S APPROACH TO SHARED RESPONSIBILITY FOR PROGRESS

One of the challenges consistently raised to ODE and to legislators is the impact of having different terminology and processes to report and evaluate on progress related to different state and federal grant programs. For the six programs integrated here, the effort is being made to operationally align these processes for applicants. This will make for stronger reporting. This section reflects approaches to monitoring and evaluation that can support overall district and system improvement efforts. The terms "monitoring and evaluation" can create concern amongst educators. Here we are talking about the best version of processes that both meet our shared responsibilities for student outcomes as well as system and community health in ways that reflect what we value and can learn while tending to the constraints set forward in statutes and rules.

Working together, we can avoid accountability pitfalls experienced in No Child Left Behind, Race to the Top, education compacts, and other education initiatives over the last few decades. Previous accountability measures often served to narrow the curriculum, using shame and blame of schools as an overly simplistic tactic while offering over-promised or oversimplified outcomes. These efforts would often be distilled in media reports as news that was mostly about rankings and failed to offer enough nuance, depth, or realism to the important work of school improvement.

ODE is applying the following values in setting out guidance in this area:

1. **Monitoring and evaluation is central to learning.** Supporting the development and use of measures that are authentic, ambitious and realistic, and consider student and system growth over time is essential to support system learning and successful program implementation.
2. **Context matters.** Oregon has several districts with more than 10,000 students. It has almost as many districts with fewer than 10 students. Approaches to the development and monitoring of Longitudinal Performance Growth Targets must be flexible, responsive and adaptive.
3. **Progress is not linear and all measures of progress are not created equal.** We have the opportunity to develop and grow an approach to monitoring and evaluating systems for district learning as well as performance.
4. **Shared responsibility.** ODE is responsible for ensuring that taxpayer dollars are being expended appropriately in compliance with federal and state laws, regulations and policies, while also meeting the intent of the legislation and enacting real change in districts, charter schools, communities and the lives of students.

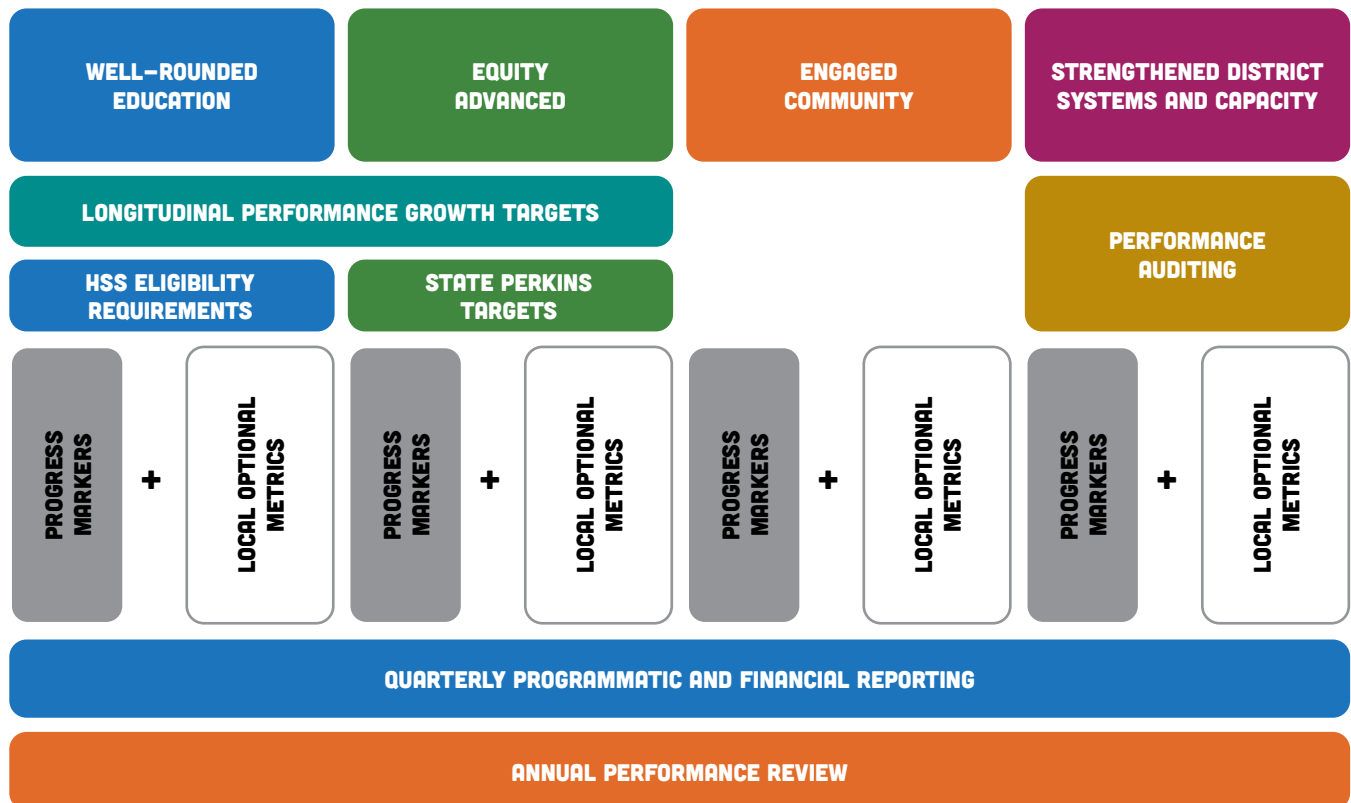
5. **Stay focused on the core purposes of each initiative, while seeing a bigger picture.** Each of the six initiatives covered in this guidance has distinct and complementary purposes. Our approach to evaluation must be able to both demonstrate the value and impact of a given initiative to its core purposes and take into account the contributions and intersections of each of the aligned initiatives.

SUMMARY OF PERFORMANCE MEASURES

There are seven distinct performance measures and processes used in the monitoring and evaluation process for implementation under this integrated guidance:

1. Longitudinal Performance Growth Targets (LPGTs)
2. High School Success Eligibility Requirements
3. State CTE Perkins Performance Targets
4. Progress Markers
5. Local Optional Metrics
6. Quarterly and Financial Reporting
7. Annual Reporting
8. Auditing (SIA funds only)
9. Performance Reviews

Here's one way to visualize how these evaluation components fit together:



In the details that follow, a more precise picture of what contributes to success is put forward. There are clear Performance Measures and Targets within CTE Perkins and the co-development of Longitudinal Performance Growth Targets with applicants.

ODE is also sustaining use of progress markers to help set clear indicators of the kinds of changes we'd expect to see over time but likely ahead of changes in traditional educational metrics.

Finally, recipients are encouraged to make full use of their freedom to develop and set local optional metrics as a means of demonstrating how these significant resources are being well used to further the outcomes put forward in the planning process.

ATTENDING TO OREGON'S SMALLEST DISTRICTS

ODE recognizes the importance of local context and the need for a differentiated approach for very small districts, especially those with an Extended ADMw enrollment of 100 or lower. Oregon's smallest districts are required to be members of a CTE regional consortium,⁷⁵ but for the other programs contained in this guidance, ODE will focus solely on the local optional metrics and the progress markers as described below.⁷⁶ While ODE will monitor changes to the required five common metrics that the LPGTs are based on, Oregon's smallest districts will not be required to provide any projections or forecasts of these measures.

LONGITUDINAL PERFORMANCE GROWTH TARGETS (LPGTS)

LPGTs, also referred to as "common metrics," are required in statute by the Student Investment Account but correspond to key improvement measures also outlined for the High School Success, Every Day Matters, CSI/TSI, and CTE. These five common metrics are identified in legislation and are described here. Grantees are welcome to develop and submit additional growth targets using the same or similar framework if it supports their local monitoring and evaluation efforts⁷⁷.

Extensive technical and conceptual guidance ([Appendix I: LPGT Development](#)) on setting LPGTs can be found in the appendices.

COMMON METRICS – LONGITUDINAL PERFORMANCE GROWTH TARGETS:

1. [Four-year Graduation](#): The percentage of students earning a regular or modified diploma within four years of entering high school.
2. [Five-year Completion](#): The percentage of students earning a regular, modified, extended or adult high school diploma, or a GED within five years of entering high school.
3. [Third Grade Reading](#): The percentage of students proficient on statewide English Language Arts (ELA) assessments in 3rd grade.
4. [Ninth Grade On-Track](#): The percentage of students earning at least one-quarter of their graduation credits by the end of the summer following their 9th grade year.
5. [Regular Attenders](#): The percentage of students attending more than 90 percent of their enrolled school days.

⁷⁵ Link back to information on CTE Consortium

⁷⁶ Small districts must still comply with all Perkins monitoring and reporting requirements as part of a CTE consortium.

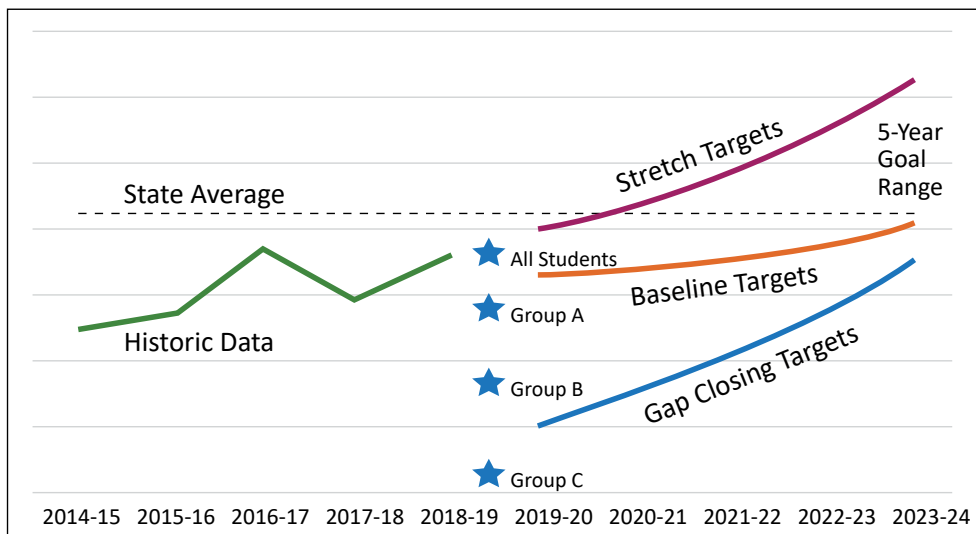
⁷⁷ Remediation rates encourage using postschool outcomes and indicators such as FAFSA/ORSA Completion, college enrollment, remediation rates, college completion, and employment.

All of these common metrics are research-based indicators of the effectiveness and health of our educational system. Additionally, these metrics are influenced by what systems and schools do to target improvement. These metrics can be slow-moving, lagging measures that can be difficult to explicitly link to or be solely reflective of the allowable investments described in this guidance. **Some of these measures may have data quality impacts related to system responses to COVID-19.**

The Longitudinal Performance Growth Targets required by the [Student Success Act](#) can still provide a picture of key points of student progress and growth. They don't, however, show every aspect of student growth, cohort growth, or system improvement, nor are they intended to. It is important to acknowledge that several of the ways the funds and programs described in this integrated guidance can be used support corresponding changes in these metrics over time. It is also important to name that there are meaningful and allowable investments that could be pursued that would not directly or immediately correspond to changes in these metrics. This further supports attention to local optional metrics and progress markers alongside these growth targets.

A Visual of Longitudinal Performance Growth Targets

The graph below shows baseline and stretch targets for “all students” over five years along with a single, gap-closing target.



Recipients are asked to create baseline targets (the minimum growth they would be satisfied with) and stretch targets (a more ambitious but still realistic set of targets) for all students, as well as gap-closing targets (to monitor the reduction of academic disparities between groups of students) for focal student groups.

HIGH SCHOOL SUCCESS ELIGIBILITY REQUIREMENTS

Eligibility requirements for High School Success must remain fully in place. These were assessed in 2020-2021 and 2021-2022 and attention will be sustained to remedy where requirements are not in place at the established baseline. Now, the goal is to strive for continuous improvement and these requirements will continue to be revisited and monitored.

The requirements for eligibility, as outlined in [ORS 327.883](#) are:

1. Teacher Collaboration Time around Key Student Data
2. Practices to Reduce Chronic Absenteeism
3. Equitable Assignment of Students to Advanced Courses
4. Systems Ensuring On-Time Graduation, including for English Language Learners

Any new high schools will be assessed around eligibility implementation and will have a timeline to ensure that these requirements are fully put into place. See [Appendix I](#) for additional details on High School Success Eligibility Requirements.

INTEGRATING AND MEETING STATE CTE PERKINS V PERFORMANCE TARGETS

Under Perkins V, states are required to report annually on [core indicators of performance](#) for all students being served by CTE Programs of Study as well as by student population and career cluster. Schools report their CTE data through the CTE Information System, CTE Course Collection, and CTE Student Collection for approved programs no matter how these programs are funded. Oregon's state developed [CTE performance targets](#) can be found in the CTE State Plan. While the Perkins V framework offers less flexibility, the CTE Perkins targets and trajectories have still been set at reasonable but ambitious levels based on Oregon's history of high performance for CTE Concentrators⁷⁸.

Perkins targets, as required by federal law, were set at a statewide level using a public engagement process. Recipients are not responsible for creating their own targets; however, Perkins recipients and CTE consortia members will use data from the annual Perkins 90% Report and CTE data dashboard as part of the needs assessment process and to inform use of funds to meet student needs and maintain high program quality. As a federal program, Perkins V requires disaggregation of data to reveal any impact on different student groups. Data disaggregation is a best practice in research equity, and a core commitment of each of the initiatives covered in this integrated guidance. Oregon's statewide Perkins performance targets provide an opportunity for local education entities to identify gaps that may exist for students who have historically and are currently marginalized by educational systems. Each and every student can and should be engaged and benefit from participation in CTE Programs of Study and benefit from career education training.

CTE performance target monitoring can be used as a model for ways to track and monitor student opportunity and program quality for other school programs such as accelerated learning opportunities and summer programs.

Perkins recipients who don't meet 90% of the CTE performance targets are prioritized for support using performance improvement plans. The 90% threshold can be thought of as a buffer and warning indicator for schools to focus on improvements. The performance measures specified here may be chosen by districts as local optional metrics (see section on local optional metrics below). **Further integration of these target measures, and of Perkins with other initiatives, benefits students by centering authentic student experiences and learning, and by promoting deeper connections to communities. CTE targets can offer a model for ways applicants can shape and expand targets for all students even if only federally required for CTE concentrators.**

⁷⁸ The number of secondary CTE concentrators using the new definition will decrease by 45 to 55 percent but will also reflect students who have more intentional participation in CTE, in line with congressional intent.

CTE PERFORMANCE MEASURES

- Reading Attainment: The percentage of secondary CTE concentrators who demonstrate proficiency in reading/language arts as measured by the statewide assessment.
- Math Attainment: The percentage of secondary CTE concentrators who demonstrate proficiency in mathematics as measured by the statewide assessment.
- Science Attainment: The percentage of secondary CTE concentrators who demonstrate proficiency in science as measured by the statewide assessment.
- High School Graduation (4-year): The percentage of secondary CTE concentrators who graduate within four years.
- High School Graduation (Extended): The percentage of secondary CTE concentrators who graduate within five years.
- Postsecondary Placement: The percentage of CTE concentrators who, in the second quarter after exiting from secondary education, are in postsecondary education; are in advanced training, military service, or a service program; or are employed.
- Non-Traditional Participation: The percentage of CTE concentrators in CTE programs and Programs of Study that lead to fields that are non-traditional for the gender of the concentrator.
- Participated in Work-Based Learning: The percentage of CTE concentrators graduating from high school having participated in work-based learning.

Please Note: Specific CTE data [are available at this website](#) for school districts, community colleges and consortia in Oregon.

PROGRESS MARKERS

For each of the five common metrics, ODE is solidifying the use of *progress markers*. Progress Markers are sets of indicators, potential milestones, that identify the kinds of changes towards the outcomes expected and desired in action, attitude, practice, or policies over the next four years that can help lead applicants to reaching Longitudinal Performance Growth Targets and the four common goals.

Progress Markers are intended to support applicants and grantees to learn and attend to their changemaking efforts and to support understanding how specific activities/strategies are *contributing* to desired outcomes and targets. Progress Markers illuminate the depth and complexity of changes that advance over time. Moving from early and expected changes, towards likely changes; and extending all the way toward profound changes desired based on the efforts of grant recipients.

The theoretical underpinnings of progress marker development for ODE is informed by [Outcome Mapping](#)⁷⁹ - an approach to planning, monitoring and evaluation that puts people at the center, defines outcomes as changes in behavior, and helps measure contribution to complex change processes. ODE offers these progress markers to partner with applicants in determining and assessing where changes are occurring.

Recipients are not expected or required to meet all progress markers, only to track changes when the investments create or contribute to the changes outlined (as determined by the recipient). That's worth repeating. Reporting on progress markers is required under this guidance but attainment or accomplishing each marker is not expected or anticipated. Progress marker reporting is most helpful to grantees when they establish consistent ways to review what changes they are seeing in the implementation of their plans. ODE, under this guidance, requires progress marker updates be shared with ODE on a quarterly and annual basis.

The information provided from progress marker reporting will inform the technical assistance and coaching that ODE provides throughout the year. The information will also support ODE to keep the educational field, the public, and the legislature informed about the important kinds of progress being

79 Earl, S., Carden, F., & Smutylo, T. (2001). Outcome mapping: building learning and reflection into development programs. Ottawa: IDRC.

made with significant taxpayer investments that might not otherwise be illuminated as quickly by slower moving metrics. As described above, LPGTs represent metrics that applicants will be held accountable to with potential for state intervention if targets are not met over time. Progress Markers represent an avenue to track and learn how change-making is occurring, leading to system growth, effective engagement and instruction, and stronger student learning outcomes.

PROGRESS MARKER FRAMEWORK FOR 2023–2025

The following progress marker framework is put forward to provide a clear picture and preview of what progress markers will look like under this guidance from July 1, 2023 to June 30, 2025. This framework was developed through rounds of engagement with more than 30 leading experts in Oregon in each common metric, including practitioners and policy advocates with refinement from their optional use over the last two years.

These indicators will get additional engagement and input through workshops in the Spring and Fall of 2022 before being finalized.⁸⁰ They are offered here to support district planning and the general dimensions of what is covered are unlikely to change significantly.

It is also important to note that this framework would be stronger if there was a full slate of progress markers capturing the kinds of changes we'd expect to see for each common metric and even each common goal within the state ESSA plan. Out of respect for the current complexity of COVID response and keeping the commitment to only ask for the information that ODE is at capacity to monitor and use, this framework maintains a curated and integrated set of progress markers. Functionally, this means that progress markers work across the growth targets and common goals but ideally will, in their final form, reflect a meaningful effort to mark the kinds of changes we'd expect and hope to see happen as a result of these significant state investments.

EXPLAINING HOW PROGRESS IS MARKED

- **“Expect to see”** progress makers represent initial, easy to achieve changes that would likely occur in the first three to six months of implementation of the programs put forward in this integrated guidance.
- **“Would like to see”** progress markers represent the kinds of changes that would occur within six to eighteen months of implementation and indicate more significant changes in engagement and student and educator learning conditions.
- **“Would love to see”** progress markers describe the kinds of profound changes that would occur in the first 18-months to four-years of implementation. For many grantees, these markers of progress would be unusual to see in the first year of implementation under this guidance.

Individually, progress markers can be considered indicators of behavioral change, but their real strength rests in their utility as a set, as cumulatively they illustrate the complexity of the change process. This is something no single indicator can accomplish.

⁸⁰ For example, new performance standards for K-12 education accreditation have been released by Cognia in support of continuous improvement at <https://www.cognia.org/wp-content/uploads/2021/08/Performance-Standards.pdf> ODE will explore where further alignment is valuable.

2023–25 PROGRESS MARKERS

6 changes we <u>expect</u> to see:	6 changes we would <u>like</u> to see:	4 changes we would <u>love</u> to see:
Consistent community engagement recognizes and honors the strengths that educators, students and families bring to the educational experience and informs school and district planning.	Educators use student-centered approaches to foster student voice, reinforce student engagement and motivation, and increase academic achievement.	Financial stewardship is reflected in both accurate and transparent use of state and federal funds with integrity and purpose, while also centering student and community voices in resource allocation.
Equity tools are utilized in continuous improvement cycles, including the ongoing use of an equity lens or decision-tool that impacts policies, procedures and practices.	Dedicated time for professional learning and evaluation tools are in place to see if policies/procedures are adequately meeting the needs of students and address the root-causes of chronic absenteeism.	Educators experience a balanced approach to assessment systems that help them identify student learning in the areas of reading, writing, research, speaking, and listening that are clearly connected to Oregon’s English Language Arts and Literacy Standards.
Data teams are forming, and they frequently review data that inform a school’s decision-making processes, including barriers to engagement, attendance, contextual factors influencing the data, and participation and completion of experiences such as career exploration, CTE Programs of Study, Accelerated Learning courses and work-based learning experiences. ⁸¹	Comprehensive literacy strategies, including professional development plans for educators, are documented and communicated to staff, students (developmentally appropriate), and families.	Schools and districts have a process to identify and analyze the barriers that disconnect students from their educational goals and/or impede students from graduating on time ⁸² and/or transitioning to their next steps after high school.
Schools and districts have an inventory of literacy assessments, tools, and curriculum being used.	A review of 9th grade course scheduling is conducted, accounting for student core and support course placement, and disaggregated by student focal groups. ⁸³	Students have avenues to share and communicate their dreams and aspirations at all levels, including a clear picture of the contributions and next steps they plan to take after they graduate from high school.
Effective communication exists between educators and families about student growth, literacy trajectory, areas for improvement, and individualized supports are provided. This includes communication around graduation requirements and advanced courses, including CTE. ⁸⁴	Foundational learning practices are visible or emerging that ensure safe, brave, and welcoming classroom and school environments that are strengths-based, equity-centered, trauma-and SEL-informed. This means policies and practices exist that prioritize health, well-being, care, connection, and relationship building, and honor individuals’ ways of being and knowing through culturally affirming and sustaining practices for students, staff, and administrators. ⁸⁵	
Schools and districts co-develop and communicate a shared understanding (among educators, students, families and community members) of what it means to be on-track by the end of the 9th Grade. This includes evidence of increased enrollment in advanced courses as well as ensuring English Language Learners are enrolled in appropriate courses to ensure on-time graduation. ⁸⁶	Schools strengthen partnerships with active community organizations and partners, including local public health, mental health, colleges, workforce development boards, employers, faith communities, tribal leaders, and others.	

- 81 Providing sufficient time for teachers and staff of 9th grade students to review data is an eligibility requirement for High School Success (Measure 98) funding in high schools. This suggests the value of that practice when well designed for all developmental levels. Duplication in focus is acceptable and strategic in this case. Funds should be braided but grantees can’t use funding for the same purpose with both initiatives.
- 82 ODE considered and received substantial but mixed feedback about the value of mapping the math strategy, and while we chose not to include formally, SIA recipients are encouraged to review the literature and develop an understanding of what Math proficiency is, what it looks like for students and how shared competencies are taught in 9th grade Math.
- 83 Again, this is intentionally aligned with High School Success goals and best practices. Changes in progress that might come in part from SIA investments and in part from HSS investments are acceptable to include as “contributions to change” as what we are most interested in is that change is occurring and learning from what is unfolding.
- 84 Aligns to HSS requirements
- 85 Aligned with ODE’s [Integrated Model of Mental Health](#)
- 86 Aligns to HSS requirements

PARTNERS* CONTRIBUTE TO CHANGE

ODE understands, and our evaluation efforts must therefore include awareness of, the different people and roles that contribute to powerful systems change and improvement in student engagement and learning conditions. As grantees picture the work that will unfold and who will contribute to change, we recommend seeing and imagining all of the different people that will be involved in the effort. Below is a list that is not intended to be exhaustive, but to rather showcase the amount of diversity and roles successful implementation will take. Who will be essential to success in your system?

Educators	Business and Industry partners	Higher Education Coordinating Commission
Principals	Vocational Rehabilitation and Transition Specialists	Community college partners
Superintendents	Attendance officers / coordinators	University faculty (preservice program)
School board members	After School Providers	Pre-K and childcare providers
Instructional Coaches	School safety and prevention specialists	Early Learning Hubs
Instructional Assistants/ Paraprofessionals Curriculum and Instruction (district level)	Mental Health Teams	Non-profit/volunteer reading programs (e.g. SMART Readers)
9th grade on-track coaches	Counselors and guidance counselors	Educator Advancement Council
Special Education educators (K-12)	Community-based and culturally-specific organizations	STEM Hubs
School personnel	Psychologists, social workers, traditional health workers, and community-based mental health professionals	Researchers
Scheduling Administrators Parents and Families	Primary care providers	Legislators
Bus Drivers	Graduation coaches	Judicial representatives
CTE Regional Coordinators	Family resource liaisons	McKinney-Vento liaisons
CTE Student Leadership Organization Representatives and Student Officers	ODE staff	Tribal/cultural/community leaders
Local workforce development boards	ESD staff	DHS/child welfare
Local chamber of commerce		Media

*Grantees will be asked to describe in annual reports how partners like these have contributed to the changes they see within their implementation efforts.

LOCAL OPTIONAL METRICS

The next aspect of this overall evaluation framework are local optional metrics. So far, these have been an underutilized tool that both legislators and ODE believe offer schools and districts a meaningful opportunity to name and utilize metrics they find significant and to demonstrate how they are improving and meeting outcomes named in their planning on their own terms.

WHY DEVELOP LOCAL OPTIONAL METRICS?

1. State level measures can be valuable for state policy, state investments, and high-level interventions in district and school improvement but can never account for the local and immediate ways in which data and information can support actionable improvement.
2. Applicants can leverage this opportunity to name and create their own tools and ways to be reviewed by ODE in addition to the state-level frameworks.
3. With the passage of HB 2060 in the 2021 Session, grantees are encouraged to set optional metrics and growth targets that speak to student and school staff well-being and health -- something that aligns the purposes put forward in several of the programs but where there previously has not been a structural avenue to show meaningful progress and action on what is being accomplished over time.

CRITERIA FOR A LOCAL OPTIONAL METRIC

Local optional metrics should be measurable, valid, and reliable (i.e. measured in a consistent way each time new data are generated), and evidence-based. ODE recommends metrics with numeric, proportional measurements (such as percent of students experiencing..., student-counselor ratio, etc.), but other measures may be approved if there is good evidence that they are meaningful indicators of progress. For all but the smallest districts, local optional metrics referring to student experiences and outcomes should be collected in such a way that they can be examined by focal student populations as well as overall.

Local optional metrics should be measured at least annually in order to provide good feedback on the improvements being made under these programs. ODE

will consider metrics measured biennially if an interim measure is available in off-years (e.g. alternating student health survey results with a local climate survey). Metrics must be broadly representative of the students being served - when possible, they should aim to represent all students within a district, school or grade level. Metrics focusing on a specific focal student group may be approved in combination with broader-based metrics or when deemed appropriate for the specific challenges the district hopes to address under these initiatives.

An equity lens requires that metrics and related data should be considered, evaluated, and reported with significant consideration of individual and local context. This means asking not only what is occurring, but why. For example, if a certain proportion of students are missing school, it is essential to obtain qualitative information regarding the conditions, barriers or limitations that are interfering with attendance. Data collection may take the form of additional qualitative questions, or by asking a representative sample of respondents to assist with data interpretation. This level of inquiry is essential to creating a nuanced understanding of challenges and growth opportunities, and to ensuring that data collection and interpretation incorporate an equity lens.

Using optional metrics and local growth targets to support student mental and behavioral health

[HB2060](#) allows for targets to be established related to student mental and behavioral health needs, as established by the State Board of Education by rule. The State Board is anticipated to complete rule development in late Spring 2022. These are not required, but they do create an important avenue to align uses of state dollars to desired changes that traditional metrics might not capture.

It is recommended that mental and behavioral health-related metrics focus on systems level considerations rather than individual, static outcomes. Domains such as safety, belonging, school culture and climate, and access to quality mental health services and supports can help to identify needs, barriers, and growth opportunities.

APPLICANTS MAY CUSTOMIZE WITH OPTIONAL LOCAL METRICS AND ADDITIONAL PROGRESS MARKERS

Applicants are encouraged to put forward optional local metrics that may more accurately align to the particular strategies, activities and investments outlined in their integrated grant application and plan. Examples could include school climate surveys and/or surveys and assessments of student belonging.

Grantees are also welcome to put forward additional progress markers toward the common metrics based on the framework provided.

These measures will be solidified and agreed upon in setting the final grant agreement as part of the co-development process.

For example, where a district might be prioritizing investments in reading proficiency, they are welcomed and encouraged to consider a range of optional metrics in addition to the 3rd Grade Reading common metric. A district could add their own formative and interim assessment strategies and data along with assessments of Cognitive Academic Language Proficiency that might show measures of literacy in languages other than English or show a fuller student learning profile that they want to customize and use as part of their overall monitoring and evaluation framework.

QUARTERLY PROGRAMMATIC AND FINANCIAL REPORTING

Grantees are asked to report their financial and programmatic progress on a quarterly basis - more information describing the components of and process for completing that process follows.

REPORTING ON PROGRESS MARKERS

To track progress markers over time, ODE will further embed questions that mark progress into quarterly programmatic reports. ODE will provide additional technical assistance to support understanding of how this approach to monitoring and evaluation works. Once established, these progress markers will help ODE monitor and share back learning across the state and to the legislature. Progress Markers can be helpful at the immediate local level. They may also be used, eventually, to inform ODE considerations on requiring grantees to participate in the coaching programs and/or corrective action planning outlined in the next section of this guidance.

HOW IS PROGRESS REPORTED?

The reporting and monitoring framework for this integrated guidance has been designed to support the values named previously and our efforts to honor the many moving pieces that applicants are navigating while trying to offer a rigorous and robust reflection, learning, monitoring, and support structure. Progress for all applicants will be reported and monitored primarily through three methods:

1. Quarterly Programmatic and Financial Progress Reports
2. Annual Reports
3. Check-ins with ODE points of contact

QUARTERLY PROGRAMMATIC AND FINANCIAL PROGRESS REPORTING

Reporting for all six programs will be completed through one quarterly report submission, where recipients will detail their progress and spending on outcomes, strategies and activities of their integrated plan. Most likely recipients will submit their programmatic and financial reports via a Smartsheet dashboard, similar to what has been built for the SIA Reporting Dashboard in the 2021-23 biennium. Recipients will receive a link to their reporting dashboard and instructions via Smartsheet each fall prior to the first reporting deadline and additionally every quarter as a reminder one month before a quarterly progress report is due. A template and detailed guidance for these quarterly reports will be released to the field at a later date; however, grantees should be prepared to include the expenses for each programmatic funding stream for each budgeted activity (i.e. for each activity in the approved budget, state the amount spent from HSS funds, EIS funds, etc.).

Each quarter, grant recipients will be required to submit Progress Reports that include expenditure reports⁸⁷, status of activity implementation and journaling progress narrative responses. Once a year, an Annual Report submission will also be required which will include narrative responses and updates on progress markers which is outlined in more detail below.

CTE Regional Coordinators will have access to district quarterly reports to help inform regional work.

For the 2023-2024 School Year, the quarterly reports are due on the following dates:

Due Date	Reporting Period	Included in the Progress Report
October 31, 2023	Quarter 1 (July 1, 2023 - September 30, 2023)	Expenditure report; status of activity implementation; journaling progress questions ⁸⁸
January 31, 2024	Quarter 2 (October 1, 2023 - December 31, 2023)	Expenditure report; status of activity implementation; journaling progress questions AND Financial Audit and board minutes
April 30, 2024	Quarter 3 (January 1, 2024 - March 30, 2024)	Expenditure report; status of activity implementation; journaling progress questions
November 30, 2024 ⁸⁹	Quarter 4 (April 1, 2024 - September 30, 2024)	Expenditure report; status of activity implementation; journaling progress questions AND Annual Report narrative responses and status of meeting progress markers and local optional metrics

⁸⁷ Note: expenditure reports are separate from the financial claims process and occur on a different timeline than indicated in this table. More detail outlined below.

⁸⁸ What is included in the quarterly Progress Report is subject to change depending on Grant Agreement/Amendment approval from the Department of Justice.

⁸⁹ For any recipients who opt out of the SIA universal extension, the reporting period for Quarter 4 and Annual Report is April 1, 2024 - June 30, 2024. For any HSS recipient who requests a summer extension, the reporting period for Quarter 4 and Annual Report is April 1, 2024 - September 30, 2024. There are plans in place to work with the State Board of Education to request rule adjustments to this process to align HSS timelines with the SIA Universal Summer Extension timeline. Additional guidance will be coming on this piece before the Spring 2023 application window.

For the 2024-2025 School Year, the quarterly reports are due on the following dates:

Due Date	Reporting Period	Included in the Progress Report
October 31, 2024	Quarter 1 (July 1, 2024 - September 30, 2024)	Expenditure report; status of activity implementation; journaling progress questions
January 31, 2025	Quarter 2 (October 1, 2024 - December 31, 2024)	Expenditure report; status of activity implementation; journaling progress questions AND Financial Audit and board minutes
April 30, 2025	Quarter 3 (January 1, 2025 - March 30, 2025)	Expenditure report; status of activity implementation; journaling progress questions
November 30, 2025 ⁹⁰	Quarter 4 (April 1, 2025 - September 30, 2025)	Expenditure report ⁹¹ ; status of activity implementation; journaling progress questions AND Annual Report narrative responses and status of meeting progress markers and local optional metrics

ANNUAL REPORTING

ANNUAL PROGRESS REPORT

Several statutes and rules⁹² require grantees to complete a progress review on an annual basis for HSS, SIA, and EIS funding. The annual report will ask recipients to review their implementation efforts, progress with any local metrics that were established in the grant development process, review how their strategies worked (or didn't), and work with ODE to substantiate changes within progress markers.

ODE will develop the Annual Report⁹³ to ensure that recipients receiving these funds report on the necessary requirements for each program outlined in statute and rules. This includes but is not limited to:

1. Students' progress toward graduation beginning in grade 9, graduation rates, rates of college attendance and need for remedial classes in college;
2. Analysis of student attendance, including for students in grade 9 through 12;
3. Analysis of disciplinary referrals, suspensions and expulsions in grades 9 through 12, disaggregated by race and ethnicity, if using HSS funds for administrative costs; and
4. Progress towards meeting Longitudinal Performance Growth Targets.

⁹⁰ The November 30 deadline applies to all SIA recipients with the universal summer extension. For any recipients who opt out of the universal extension, the deadline for the Quarter 4 and Annual Report will be September 30 and the end of Quarter 4 reporting period will be June 30. Currently, HSS recipients have to request a summer extension. There are plans in place to work with the State Board of Education to make adjustments to this process to align with the SIA Universal Summer Extension timeline. Additional guidance will be coming on this piece before the spring 2023 application window.

⁹¹ For reimbursement grants final EGMS claims must be made by November 15 of the year after the grant is made.

⁹² The statutes and rules include: [ORS 327.892](#) (HSS), [ORS 327.889](#) (HSS), [OAR 581-013-0035](#) (HSS), [ORS 327.201](#) (SIA), and [OAR 581-017-0672](#) (EIS).

⁹³ The Annual Report for 2023-25 is still in development and will be shared once complete.

The annual report questions and guidance will be added to the recipient's Smartsheet dashboard prior to the fourth quarter reporting period each year. In addition to narrative responses that describe progress towards implementation efforts, grant recipients will also include a status update on progress markers to indicate where change may be starting in policies, practices and approaches over the next three years that we think would lead to applicants reaching their Longitudinal Performance Growth Targets⁹⁴.

The annual report serves as the review for this first year of integrated implementation. In order to complete the review, three steps need to be taken:

1. The annual report must be posted to the grantee's webpage⁹⁵;
2. The annual report must be presented at an open meeting with the opportunity for public comment (not a consent agenda item); and
3. The annual report must be approved by the governing board.

The annual report is a chance to pull back and reflect on the whole of what you've learned and any impact you are seeing. It's also an opportunity to share an update with your students, parents, and community.

ANNUAL PERKINS MONITORING

Under section 211 of the Strengthening Career and Technical Education for the 21st Century Act (Perkins V), and section 200.329 of the Education Department General Administrative Regulations (EDGAR), ODE and the Higher Education Coordinating Commission (HECC) are required to monitor eligible recipients and their sub-recipients annually for the purposes of:

- Assuring that Perkins V funds have been expended appropriately to meet the intent of the legislation and in compliance with federal and state laws, regulations, and policies;
- Reviewing and verifying accurate data collection;
- Analyzing, identifying, and changing policies and activities that hinder quality program development and student achievement; and
- Ensuring that equal educational opportunities are provided to all students, including full opportunity to participate in programs, activities, and career opportunities, and to benefit from services

Reviewers look at the following elements:

- Local budget management (allocability, supplement vs supplant, professional development and administrative caps, inventory)
- Equity (disaggregated data review and a system to identify discrepancies and determine root cause analysis, MOA findings)
- Perkins leadership and staff
- Program performance indicators (including the attainment of postsecondary CTE credits and credentials)
- Late, substandard, or inaccurate submissions (data, grant application, grant reports, program of study applications, renewals, and updates)

94 Note: this change was captured as a dropdown menu (with options for no change, low, medium, or high) in the SIA Annual Report for 2020-21, but reporting may evolve in the coming biennium.

95 There is not required format for recipients when presenting their annual report questions and response to the community and board. Grantees may post the annual report questions and response in a slide deck, downloaded from Smartsheet, or in any other format that is accessible to the community and board. Recipients can satisfy the annual report approval requirement by providing ODE with the board meeting minutes and URL showing where the annual report questions and responses are posted.

ANNUAL AUDIT (SIA FUNDS ONLY)

All districts are required to submit an annual Financial Audit to ODE; however, only those grant recipients of SIA funding will be required to submit an annual financial audit. Under Section 15 of the Act, SIA recipients are required to conduct a financial audit in accordance with the Municipal Audit Law⁹⁶, which includes consideration of SIA compliance and reporting. The audit is structurally designed to be embedded in the school district or eligible charter school's annual financial audit, and is similar to work performed for the State School Fund (e.g. considering high-risk areas such as ADM, Transportation Grant and others)⁹⁷. To assist with audit planning, ODE has published [Financial Audit Guidance](#) and [Suggested Audit Procedures](#).

The annual financial audit for SIA must be:

- Made available at the main office of the grant recipient and on the grant recipient's webpage;
- Presented to the governing body of the grant recipient at an open meeting with the opportunity for public comment on the results; and
- A copy of the financial audit and board meeting minutes will need to be forwarded to ODE.

Also specific to SIA funding, ODE is required by law to establish a procedure and conduct performance and financial audits on a random basis, or based on just cause, with rules adopted by the State Board of Education. In June 2021, the State Board of Education adopted the [Just Cause and Random Audit Process rules](#).

PERFORMANCE REVIEWS

[Performance Review Standards rules](#) have also been set by the State Board of Education and are required of SIA grantees every four years. The first SIA Performance Reviews will be completed by December 31, 2023 (covering the initial three-years of plan execution). [ORS 327.892](#) provides similar authority for review of performance and use of High School Success funds. ODE will be developing the process and procedure for an integrated review of performance under this guidance with an anticipated review occurring no later than December 31, 2027.



⁹⁶ https://oregon.public.law/statutes/ors_297.405

⁹⁷ The discretion and levels of testing and materiality remain with the auditors

581-022-2000 Diploma Requirements

(1) Each district school board and public charter school with jurisdiction over high school programs shall award diplomas to all students who fulfill all state requirements as described in sections (2) to (118) of this rule and all local school district requirements as described in district school board policies or all public charter school requirements as described in the policies or charter of the public charter school.

~~(2) Unit of Credit Requirements for students graduating before July 1, 2009:~~

~~(a) Each student shall earn a minimum of 22 units of credit to include at least:~~

~~(A) English Language Arts — 3 (shall include the equivalent of one unit in Written Composition);~~

~~(B) Mathematics — 2;~~

~~(C) Science — 2;~~

~~(D) Social Sciences 3 — (including history, civics, geography and economics (including personal finance));~~

~~(E) Health Education — 1;~~

~~(F) Physical Education — 1;~~

~~(G) Career and Technical Education, The Arts or World Languages — 1 (one unit shall be earned in any one or a combination).~~

~~(b) A district school board or public charter school with a three-year high school may submit through the waiver process alternative plans to meet unit requirements;~~

~~(c) A district school board or public charter school may increase the number of units required in specific areas, and may increase or decrease the number of elective units; however, the total units of credit required for graduation shall not be less than 22;~~

~~(d) A school district or public charter school may grant high school credit for courses taken prior to grade 9 if students taking pre-grade 9 courses are required to meet performance criteria that are equivalent to the performance criteria for students taking the same high school courses;~~

~~(e) Course syllabi shall be written for courses in grades 9 through 12 and shall be available to students, staff, parents, the district school board and other interested individuals.~~

~~(3) Except as provided in section (4) of this rule, Unit of Credit Requirements for students graduating on or after July 1, 2009 and who were first enrolled in grade 9 prior to the 2008–2009 school year:~~

~~(a) Each student shall earn a minimum of 24 units of credit to include at least:~~

- (A) English Language Arts — 4 (shall include the equivalent of one unit in Written Composition);
 - (B) Mathematics — 3;
 - (C) Science — 2;
 - (D) Social Sciences 3 — (including history, civics, geography and economics (including personal finance));
 - (E) Health Education — 1;
 - (F) Physical Education — 1;
 - (G) Career and Technical Education, The Arts or World Languages — 1 (one unit shall be earned in any one or a combination).
- (b) A district school board or public charter school with a three-year high school may submit through the waiver process alternative plans to meet unit requirements;
- (c) A district school board or public charter school may increase the number of units required in specific areas, and may increase or decrease the number of elective units; however, the total units of credit required for graduation shall not be less than 24;
- (d) A school district or public charter school may grant high school credit for courses taken prior to grade 9 if students taking pre-grade 9 courses are required to meet performance criteria that are equivalent to the performance criteria for students taking the same high school courses;
- (e) Course syllabi shall be written for courses in grades 9 through 12 and shall be available to students, staff, parents, the district school board and other interested individuals.
- (4) Notwithstanding sections (2) and (3) of this rule, for students who began grade 9 during the 2005–2006 school year and who attended school during the 2006–2007, 2007–2008 and 2008–2009 school years, the unit of credits required for graduating is as described in section (2) of this rule if the student graduates prior to July 1, 2010.
- (5) Unit of Credit Requirements for students who were first enrolled in grade 9 during the 2008–2009 or 2009–2010 school year:
- (a) Each student shall earn a minimum of 24 units of credit to include at least:
 - (A) English Language Arts — 4 (shall include the equivalent of one unit in Written Composition);
 - (B) Mathematics — 3;
 - (C) Science — 3;
 - (D) Social Sciences 3 — (including history, civics, geography and economics (including personal finance));
 - (E) Health Education — 1;

~~(F) Physical Education — 1;~~

~~(G) Career and Technical Education, The Arts or World Languages — 3 (units shall be earned in any one or a combination).~~

~~(b) A district school board or public charter school with a three-year high school may submit through the waiver process alternative plans to meet unit requirements;~~

~~(c) A district school board or public charter school may increase the number of units required in specific areas, and may increase or decrease the number of elective units; however, the total units of credit required for graduation shall not be less than 24;~~

~~(d) A district school or public charter school may grant high school credit for courses taken prior to grade 9 if students taking pre-grade 9 courses are required to meet performance criteria that are equivalent to the performance criteria for students taking the same high school courses;~~

~~(e) Course syllabi shall be written for courses in grades 9 through 12 and shall be available to students, staff, parents, the district school board and other interested individuals.~~

~~(62) Unit of Credit Requirements for students who were first enrolled in grade 9 during the 2010–2011 school year or first enrolled in grade 9 in any subsequent school year:~~

(a) Each student shall earn a minimum of 24 units of credit to include at least:

(A) English Language Arts — 4 (shall include the equivalent of one unit in Written Composition);

(B) Mathematics —3 (shall include one unit at the Algebra I level and two units that are at a level higher than Algebra I);

(C) Science — 3;

(D) Social Sciences 3 — (including history, civics, geography and economics (including personal finance));

(E) Health Education — 1;

(F) Physical Education — 1;

(G) Career and Technical Education, The Arts or World Languages — 3 (units shall be earned in any one or a combination).

(b) A district school board or public charter school with a three-year high school may submit through the waiver process alternative plans to meet unit requirements;

(c) A district school board or public charter school may increase the number of units required in specific areas, and may increase or decrease the number of elective units; however, the total units of credit required for graduation shall not be less than 24;

(d) A district school board or public charter school must waive any additional district requirements if students are or, were at any time from grade 9-12:

(A) A foster child, a child receiving 24-hour substitute care for children placed away from their parents or guardians and for whom the child welfare agency has placement and care responsibility. This includes, but is not limited to, placements in foster family homes, foster homes of relatives, group homes, emergency shelters, residential facilities, child care institutions, and pre-adoptive homes. A child is in foster care in accordance with this definition if the foster care facility is licensed and payments are made by the State, Tribal or local agency for the care of the child, whether adoption subsidy payments are being made prior to the finalization of an adoption, or whether there is Federal matching of any payments that are made;

(B) Homeless, a child who lacks a fixed, regular, and adequate nighttime residence; a child who is sharing the housing of other persons due to loss of housing, economic hardship, or a similar reason; is living in motels, hotels, trailer parks, or camping grounds due to the lack of alternative adequate accommodations; is living in emergency or transitional shelters; or is abandoned in hospitals; a child whose primary nighttime residence that is a public or private place not designed for or ordinarily used as a regular sleeping accommodation for human beings; a child who is living in cars, parks, public spaces, abandoned buildings, substandard housing, bus or train stations, or similar settings; an unaccompanied youth not in physical custody of a parent or guardian;

(C) A runaway, an unmarried child under 18 years of age who, without consent of the parent or other person having legal custody of that child, leaves and stays away from the home or other dwelling place provided for the child by that person;

(D) A child in a military family covered by the Interstate Compact on Educational Opportunity for Military Children;

(E) A child of a migrant worker, a worker that moved as an migratory agricultural worker or migratory fisher due to economic necessity from one residence to another residence, and from one school district to another; or

(F) Enrolled in the Youth Corrections Education Program or the Juvenile Detention Education Program.

(e) A school district or public charter school must accept any credits earned by students qualified for the additional district credit requirements waiver in another school district or public charter school and must apply them toward the 24 Units of Credit Requirements for the diploma.

(f) A school district or public charter school may grant high school credit for courses taken prior to grade 9 if students taking pre-grade 9 courses are required to meet performance criteria that are equivalent to the performance criteria for students taking the same high school courses;

(g) Course syllabi shall be written for courses in grades 9 through 12 and shall be available to students, staff, parents, the district school board and other interested individuals.

(63) Unit of Credit Requirements for students who were first enrolled in grade 9 during the 2010~~22~~–2011~~23~~ school year or first enrolled in grade 9 in any subsequent school year:

(a) Each student shall earn a minimum of 24 units of credit aligned to the Oregon State Board adopted standards to include ~~at least~~:

(A) English Language Arts — 4 (shall include the equivalent of one unit in Written Composition);

(B) Mathematics —3 (shall include one unit at the Algebra I level and two units that are at a level higher than Algebra I);

(C) Science — 3;

(D) Social Sciences 3 — (shall include 0.5 unit of US civics credit in addition to at least 2.5 units of credit aligned to the Oregon State Board adopted standards for U.S. history, world history, geography, economics, and financial literacy~~including history, civics, geography and economics (including personal finance)~~);

(E) Health Education — 1;

(F) Physical Education — 1;

(G) Career and Technical Education, The Arts or World Languages — 3 (units shall be earned in any one or a combination).

(b) A district school board or public charter school with a three-year high school may submit through the waiver process alternative plans to meet unit requirements;

(c) A district school board or public charter school may increase the number of units required in specific areas, and may increase or decrease the number of elective units; however, the total units of credit required for graduation shall not be less than 24;

(d) A district school board or public charter school must waive any additional district requirements if students are or, were at any time from grade 9-12:

(A) A foster child, a child receiving 24-hour substitute care for children placed away from their parents or guardians and for whom the child welfare agency has placement and care responsibility. This includes, but is not limited to, placements in foster family homes, foster homes of relatives, group homes, emergency shelters, residential facilities, child care institutions, and pre-adoptive homes. A child is in foster care in accordance with this definition if the foster care facility is licensed and payments are made by the State, Tribal or local agency for the care of the child, whether adoption subsidy payments are being made prior to the finalization of an adoption, or whether there is Federal matching of any payments that are made;

(B) Homeless, a child who lacks a fixed, regular, and adequate nighttime residence; a child who is sharing the housing of other persons due to loss of housing, economic hardship, or a similar reason; is living in

motels, hotels, trailer parks, or camping grounds due to the lack of alternative adequate accommodations; is living in emergency or transitional shelters; or is abandoned in hospitals; a child whose primary nighttime residence that is a public or private place not designed for or ordinarily used as a regular sleeping accommodation for human beings; a child who is living in cars, parks, public spaces, abandoned buildings, substandard housing, bus or train stations, or similar settings; an unaccompanied youth not in physical custody of a parent or guardian;

(C) A runaway, an unmarried child under 18 years of age who, without consent of the parent or other person having legal custody of that child, leaves and stays away from the home or other dwelling place provided for the child by that person;

(D) A child in a military family covered by the Interstate Compact on Educational Opportunity for Military Children;

(E) A child of a migrant worker, a worker that moved as an migratory agricultural worker or migratory fisher due to economic necessity from one residence to another residence, and from one school district to another; or

(F) Enrolled in the Youth Corrections Education Program or the Juvenile Detention Education Program.

(e) A school district or public charter school must accept any credits earned by students qualified for the additional district credit requirements waiver in another school district or public charter school and must apply them toward the 24 Units of Credit Requirements for the diploma.

(f) A school district or public charter school may grant high school credit for courses taken prior to grade 9 if students taking pre-grade 9 courses are required to meet performance criteria that are equivalent to the performance criteria for students taking the same high school courses;

(g) Course syllabi shall be written for courses in grades 9 through 12 and shall be available to students, staff, parents, the district school board and other interested individuals.

(74) Each student shall demonstrate proficiency in essential skills adopted by the State Board of Education as provided in OAR 581-022-2115;

(85) School districts shall develop a process that provides each student the opportunity to develop an education plan and build an education profile in grades 7 through 12 with adult guidance. The plan and profile shall be reviewed and updated periodically (at least annually) and be supported by a Comprehensive Guidance Program as defined in OAR 581-021-0435.

(96) Each student shall develop an education plan and build an education profile.

(a) Each student shall develop an education plan that:

(A) Identifies personal and career interests;

(B) Identifies tentative educational and career goals and post high school next steps (i.e. college, workforce, military, apprenticeship, other);

(C) Sets goals to prepare for transitions to next steps identified in section (7)(b);

(D) Designs, monitors and adjusts a course of study that meets the interest and goals of the student as described in subsection (a) (A), (B) and (C) of this rule that includes but is not limited to:

(i) Appropriate coursework and learning experiences;

(ii) Identified career-related learning experiences; and

(iii) Identified extended application opportunities.

(b) Through the education profile each student shall:

(A) Monitor progress and achievement toward standards including:

(i) Content standards;

(ii) Essential skills;

(iii) Extended application standard; and

(iv) Other standards where appropriate (e.g. industry standards).

(B) Document other personal accomplishments determined by the student or school district.

(C) Review progress and achievement in subsection (b)(A) and (B) of this subsection at least annually.

~~(107)~~ Each student shall build a collection of evidence, or include evidence in existing collections(s), to demonstrate extended application (as defined in OAR 581-022-0102);

~~(118)~~ Each student shall participate in career-related learning experiences outlined in the education plan (as defined in OAR 581-022-0102);

~~(129)~~ Notwithstanding sections (1) to ~~(118)~~ of this rule, each district school board or public charter school governing board with jurisdiction over high school programs shall award a modified diploma to those students who have demonstrated the inability to meet the full set of academic content standards even with reasonable modifications and accommodations and who fulfill all requirements as described in OAR 581-022-2010.

~~(1310)~~ Notwithstanding sections (1) to ~~(118)~~ of this rule, each district school board or public charter school governing board with jurisdiction over high school programs shall award an extended diploma to those students who have demonstrated the inability to meet the full set of academic content standards even with reasonable modifications and accommodations and who fulfill all requirements as described in OAR 581-022-2015.

~~(1411)~~ Notwithstanding sections (1) to ~~(118)~~ of this rule and as provided in OAR 581-022-2020, schools districts and public charter schools shall make an alternative certificate available to students as an alternative for students who do not obtain the regular diploma, modified diploma or extended diploma.

~~(1512)~~ Attendance Requirements:

(a) Twelve school years shall be required beginning with grade 1, except when the school district adopts policies providing for early or delayed completion of all state and school district credit and performance requirements;

(b) Notwithstanding subsection (a) of this section, a student may satisfy the requirements of sections (2)(6) of this rule in less than four years. If the school district or public charter school has the consent of the student's parent or guardian, a school district or public charter school shall award a diploma to a student upon request from the student, if the student satisfies the requirements for the diploma that apply to the student based on the date of graduation of the student or the school year when the student first enrolled in grade 9, as applicable.

(c) If a school district or public charter school has the consent of a student's parent or guardian, the school district or public charter school may advance the student to the next grade level if the student has satisfied the requirements for the student's current grade level.

(d) The requirement for obtaining the consent of a student's parent or guardian under subsections (b) and (c) of this section does not apply to a student who is:

(A) Emancipated pursuant to ORS 419B.550 to 419B.558; or

(B) 18 years of age or older.

(e) The district school board may adopt policies for alternative learning experiences, such as credit by examination and credit for off-campus experiences;

(f) With any modification of the attendance requirements for graduation, school district and public charter school staff shall consider age and maturity of students, access to alternative learning experiences, performance levels, school district or public charter school guidelines and the wishes of parents and guardians.

~~(1613)~~ A school district or public charter school shall ensure that students have access to the appropriate resources to achieve a diploma at each high school in the school district or at the public charter school.

Statutory/Other Authority: ORS 326.051 & 329.451

Statutes/Other Implemented: ORS 326.051, 329.451 & 339.280

Oregon State Board of Education

March 17, 2022

AGENDA ITEM: 4.D.

<p>SUBJECT: Civics Requirement/581-022-2000 Diploma Requirements STAFF NAME & OFFICE: Amit Kobrowski OTLA</p> <p>SB513 requires a change in diploma requirement rules to communicate the need for students to earn at least .5 civics credit prior to graduation in 2026. The total amount of credits for diploma (24) remains unchanged. An adjustment to the OAR will create clear communication for school districts on Oregon diploma requirements.</p> <p><input checked="" type="checkbox"/> New Rule <input type="checkbox"/> Amend Existing Rule <input type="checkbox"/> Repeal Rule</p>	<p><input checked="" type="checkbox"/> First Reading <input checked="" type="checkbox"/> Presentation <input type="checkbox"/> No Presentation</p> <p><input type="checkbox"/> Action <input type="checkbox"/> Temp Rule <input type="checkbox"/> Presentation <input type="checkbox"/> No Presentation</p>
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BACKGROUND

Include the following points for new OARs, OAR updates or changes.

1. History:
SB 513 was passed in May of 2021. The law intends to improve civic education by requiring high school students to complete at least a half credit (.5 units) of civics before graduating in 2026.
Currently, 3 credit units of social science (geography, history, civics, economics, and personal finance) are required for a standard high school diploma.
Passage of SB513 requires a change in rule to clarify that students must earn at least .5 civics credits in addition to the 2.5 credits for other social science domains. The graduating class of 2026 will enter high school in the 2022-2023 school year and will need a pathway to earn .5 civics credit.
2. Purpose:
581-022-2000 Outlines and lists the credit and course requirements for students to earn a diploma. These rules were last updated for 2011-2012.
3. Does the board have any areas of discretion or is this strictly mirroring statute?
The statute has not yet been updated. There is minimal language in SB513 updating ORS 329.451. "(C) One half-credit of civics." However, the legislature's intent is to create a separate .5 civics course rather than the current practice of some school districts to attempt to integrate civics within another social science course.
4. Stakeholder voice/input (individual and collective i.e., groups)
During engagement sessions on SB 513 with the Office of Indian Education, ODE identified potential opportunities for deeper connections between social science civic standards and Tribal History Shared History lessons. Engagement sessions with classroom teachers on ethnic studies have included opportunities to integrate civics with the new ethnic studies integrated social science standards.

Oregon State Board of Education

March 17, 2022

AGENDA ITEM: 4.D.

ODE issued a communication to school districts in January 2022 explaining the new law and possible needed adjustments in high schools schedules. ODE held open sessions for educators and provided in-person/virtual updates to ESD and school districts on the new requirements of SB 513.

SUMMARY OF PREVIOUS BOARD ACTION

This is a first read for the State Board of Education. The draft language has been shared with the Rules Advisory Committee in November and February.

HAS THE RULE CHANGED SINCE LAST BOARD MEETING?

- N/A; first read—hasn't been before board
- No; same as last month
- Yes – As follows:

POLICY ISSUE OR CONCERNS

Throughout engagements with ESD, school districts, and educators, the main concern or barrier shared by educators from school districts not currently offering a stand-alone civics and government course, is how and where during the four-year matriculation to create a new course. Schools offering International Baccalaureate courses will need to identify a civic course outside of the IB curriculum. High schools with Advanced Placement courses can offer AP US Government to satisfy the SB 513 requirement.

Student engagement sessions have been limited due to Covid-19 protocols. However, students have shared the need for greater relevancy and opportunities for civic engagement during civics and government courses.

School districts without a current course may need to identify appropriate instructional materials needed for a stand-alone course.

EQUITY IMPACT ANALYSIS

The following questions are designed to examine how the proposed rule, policy or action systematically affect historically underserved students and/or communities.

Students from underserved communities are often absent from extension activities or outside student organizations with a primary focus on civics and government. The creation of stand-alone courses allows teachers and students to explore civics content more deeply and create more relevancy and practical application of the new ethnic studies integrated social science standards. A well-designed and culturally responsive civics/government course will increase student engagement with standards, improve academic outcomes, and provide identified opportunities for students to practice democratic citizenship.

The identification of civics/government as a required .5 credit does not change the total credits required for graduation.

Oregon State Board of Education

March 17, 2022

AGENDA ITEM: 4.D.

FISCAL ANALYSIS

What is the fiscal impact of the proposed rule changes to the Department of Education, school districts, education service districts or schools? Use the following suggestions as a guide:

Students from underserved communities are often absent from extension activities or outside student organizations with a primary focus on civics and government. The creation of stand-alone courses allows teachers and students to explore civics content more deeply and create more relevancy and practical application of the new ethnic studies integrated social science standards. A well-designed and culturally responsive civics/government course will increase student engagement with standards, improve academic outcomes, and provide identified opportunities for students to practice democratic citizenship. The identification of civics/government as a required .5 credit does not change the total credits required for graduation.

EFFECT OF A "YES" OR "NO" VOTE

Approval of the change in rule prior to June of 2022 allows for clear communication to school districts of the ORS requirement for the purpose of creating a four-year plan for students. Communication of changes in the ORS was sent from ODE to school districts, advanced program leaders, counselors, and social science teachers prior to and during high school forecasting. However, a rule change in OAR 581-022-2000 will create a consistent reference point for diploma requirement inquiries.

STAFF RECOMMENDATION

Approve Approve next month No recommendation at this time
Prompted by: State law changes Federal law changes other

ATTACHMENTS

Attachment 1:
Draft OAR



High School Graduation Civics Requirement

581-022-2000

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Alexa Pearson: Director Standards and Instructional Support
Amit Kobrowski: Office of Teaching, Learning, and Assessment
Amit.Kobrowski@ode.oregon.gov

Civics Credit Requirement for Graduation 2026

Background: Passed in May 2021, SB 513 creates a 0.5 credit requirement with the intention to have students focus on government and civics standards in a stand-alone class.

Goals of Civics:

- Improve Civic Knowledge and Engagement
- Maintain Robust Civic Health
- Understand Principles and Practices of Democracy
- Encourage and Expand Participation in Community
- Identify Rights and Responsibilities of Citizenship
- Recognize Structure and Functions of Government
- Strengthen National Identity



Social Science Timeline 2018-2027

Ethnic Studies Review of Social Science Standards

Advisory group, teacher panel, feedback session

2018-2020

Civics Laws SB513 & SB702

Renewed Focus on Civics Instruction and Standards

2021-2026

Social Science Standards Review & Revision & Instructional Materials Adoption

Next cycle of standards review will begin in 2024

2024-2026

February 2021

SBE Adopts New Social Science Standards with Ethnic Studies

Optional for districts until 2026-2027. Some districts are planning to implement in 2021

Where we are now

2026-2027

Social Science Standards with Ethnic Studies Required Implementation

2026 Standards also to include:

- New Civic
- Holocaust and Genocide K-12
- Additional Legislative Mandates

Rule Change: 581-022-2000 Diploma Requirements

Timeline:

- November 2021: Introduction of proposed rule to RAC
- December 2021: Discussion with district social science specialists
- January 2021: ODE communication to superintendents/principals/teachers
- Jan./Feb. 2022: Engagement sessions with educator advisory groups
- March 2022: First read with State Board of Education/Update school districts
- April 2022: RAC update and rules at a-glance
- May 2022: Second read at State Board with adoption
- May/June 2022: Communication to school districts

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581-022-2000 Diploma Requirements

Proposed Rule Changes-Added Language

(3) Unit of Credit Requirements for students who were first enrolled in grade 9 during the **2022–2023** school year or first enrolled in grade 9 in any subsequent school year:

(a) Each student shall earn a minimum of 24 units of credit **aligned to the Oregon State Board adopted standards** to include:

(A) English Language Arts — 4 (shall include the equivalent of one unit in Written Composition);

(B) Mathematics —3 (shall include one unit at the Algebra I level and two units that are at a level higher than Algebra I);

(C) Science — 3;

(D) Social Sciences 3 — (**shall include 0.5 unit of US civics credit in addition to at least 2.5 units of credit aligned to the Oregon State Board adopted standards for U.S. history, world history, geography, economics, and financial literacy**);

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(E) Health Education — 1;

(F) Physical Education — 1;

(G) Career and Technical Education, The Arts or World Languages — 3 (units shall be earned in any one or a combination).

581-022-2000 Diploma Requirements

Proposed Rule Changes-Delete Expired Text

(1) Each district school board and public charter school with jurisdiction over high school programs shall award diplomas to all students who fulfill all state requirements as described in sections (2) to (11) of this rule and all local school district requirements as described in district school board policies or all public charter school requirements as described in the policies or charter of the public charter school.

(2) Unit of Credit Requirements for students graduating before July 1, 2009:

- (a) Each student shall earn a minimum of 22 units of credit to include at least:
- (A) English Language Arts — 3 (shall include the equivalent of one unit in Written Composition);
 - (B) Mathematics — 2;
 - (C) Science — 2;
 - (D) Social Sciences 3 — (including history, civics, geography and economics (including personal finance));
 - (E) Health Education — 1;
 - (F) Physical Education — 1;

((G) Career and Technical Education, The Arts or World Languages — 1 (one unit shall be earned in any one or a combination).

(b) A district school board or public charter school with a three-year high school may submit through the waiver process alternative plans to meet unit requirements;

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(c) A district school board or public charter school may increase the number of units required in specific areas, and may increase or decrease the number of elective units; however, the total units of credit required for graduation shall not be less than 22;

(d) A school district or public charter school may grant high school credit for courses taken prior to grade 9 if students taking pre-grade 9 courses are required to meet performance criteria that are equivalent to the performance criteria for students taking the same high school courses;

Feedback From Engagement Sessions

- Opportunity to improve relevance
- No change to modified or extended diploma
- Advanced program courses and new requirement
- Support for civics and government teachers



Example Courses For .5 Credit Civics Requirement

Course examples and non-examples include:

Current Course Codes <i>Qualifying</i> for SB 513 Civics Credit	4151- U.S. Government-Comprehensive 4152- Topics in U.S. Government 4157- AP U.S. Government 4158- AP Comparative Government 4159- AP Government 4161- Civics
Current Course Codes <i>Not Qualifying</i> for SB 513 Civics Credit. (These courses only partially address the 9-12 Civics Standards)	4101- U.S. History-Comprehensive 4102- Early U.S. History 4103- Modern U.S. History 4104- AP U.S. History 4107- U.S Ethnic Studies 4160- U.S. Govt., Civics, Econ



Note that this is not an exhaustive list of courses. If there is a question about a course, please contact ODE Social Science specialist, Amit Kobrowski Amit.Kobrowski@ode.oregon.gov

Civics & 2021 Ethnic Studies Integrated Social Science Standards

Civics and Government Focus On:

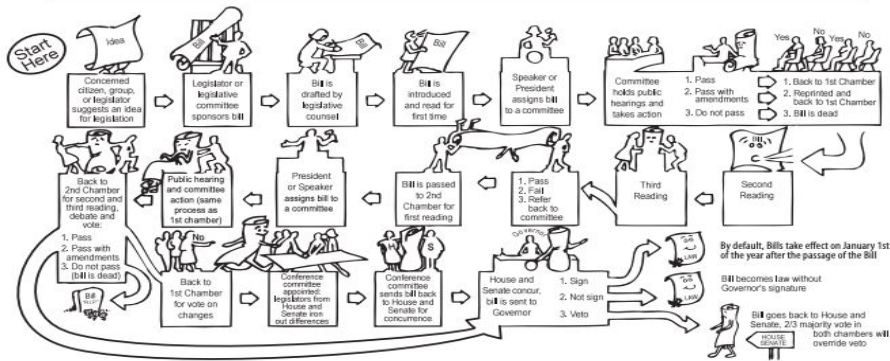
- Structure and Function of Governments
- Impact of Government
- Civic Engagement



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How an Idea Becomes Law

A simple view of the Oregon Legislative Process



Questions



Oregon Department of Education

581-022-2000 Diploma Requirements

Next Steps:

- Feb. 8 & 9 2022 Engagement sessions with educator advisory groups
- March 2022: 1st read State Board of Education/Update school districts
- April 2022: RAC update and rules at a-glance
- May 2022: Second read at State Board with adoption
- May/June 2022: Communication to school districts

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Proposed Rule Impacts: 581-022-2000 Diploma Requirements

Racial Equity:

- Ensuring civics as a minimum 0.5 credit creates additional opportunities to implement new ethnic studies integrated social science standards. Tribal History/Shared History includes tribal governance structures, Holocaust/genocide studies requires civic responsibility, new social science standards expand inquiry and understanding on civil rights and justice movements.

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Fiscal Impact:

- School districts without a civics course will need to identify teacher and materials for use in civics course.

DRAFT CREATED BY AM

581-011-0090 Assessment of Submission Fees

The following provisions shall govern the payment and collection of submission fees required of publishers who submit instructional materials for adoption. These rules are established pursuant to ORS 337.065.

(1) The fee, the retail price or \$50 whichever is greater, will be levied for each title or item of instructional material which is submitted by the publisher for review and possible adoption by the State Board of Education. An "item of instructional material" as used in this subsection is a component, set or kit of instructional materials packaged and sold as a unit. The publisher will indicate on the submission forms and the official proposal forms furnished by the Department of Education only the item(s) proposed for adoption.

(2) No fee will be required for teacher's editions of instructional materials which contain the same textual material as students' content for teacher use even though they may be evaluated in conjunction with the basic instructional program to support its strength. However, in those instances in which a teacher's guide in itself constitutes the basic program, the fee will be charged.

(3) An item of instructional material which is submitted in multiple forms (e.g., hardback, softback, electronic, loose-leaf or broken into several parts which are produced as separate units -- unless these parts are submitted for adoption at separate grade levels) which contain the same content and are evaluated essentially as one item will be assessed only one fee for the most costly format. If the materials are submitted as a set or kit for a continuous sequence of grades, a separate fee will be charged for each grade encompassed. If an item of instructional material is submitted in more than one category, a separate submission form and official proposal form must be completed for each category. A separate fee will be assessed for each category.

(4) Official forms for submission of instructional materials by publishing companies for consideration for adoption shall carry instructions and provide columns for entering the retail price and the fee to be paid for each item. Such fees will be checked for accuracy by the Department of Education on receipt of the forms, and the company will be billed for the amount due. The publisher's materials are approved for evaluation for adoption upon receipt of the correct fee. No fees will be refunded once the evaluation has been completed except in cases of fees miscalculation.

(5)(a) The Department of Education may waive the fee described in subsection (1) of this rule for an item of instructional material if the item is:

(A) A teaching and learning resource that resides in the public domain or that has been released under an intellectual property license that permits the free use and/or repurposing by others of the title or item;

(B) A basal instructional program as defined in OAR 581-011-0050; and

(C) Submitted in the format described in paragraph (A) of this subsection.

(b) The Department of Education may determine the number of waivers each year, no later than 90 days prior to the evaluation, based on the annual fee assessment.

(c) The submitter of instructional materials must request a waiver using forms provided by the Department of Education.

(d) The Department of Education shall prioritize waiver requests for materials described in subsection (5)(a) and for materials created by Oregon educators and school districts.



OR 581-011-0090

Open Educational Resource (OER) Fee Waiver

Aujalee Moore

Office of Teaching, Learning, and Assessment

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581-011-0090 Assessment of Submission Fees

Subject: [OAR 581-011-0090 Assessment of Submission Fees](#)

Concept: Open Educational Resources (OER) Fee Waiver

Background: In 2017 Chapter 337 of Oregon Revised Statute was revised to allow ODE to waive fees for teaching and learning resources that reside in the public domain and/or are licensed to allow the "free use and repurposing by others", otherwise referred to as open educational resources (OER).

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What are OER?

- Teaching and learning materials that you may freely use and reuse at no cost
- Users have permission to engage in one or more of the 5 Rs without violating copyright

Retain

- Make and own a copy

Reuse

- Use in a wide range of ways

Revise

- Adapt, modify, and improve

Remix

- Combine two or more

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Redistribute

- Share with others

"5Rs image" by [David Wiley](#), [Lumen Learning](#) is licensed under [CC BY 4.0](#)

Why Open Education Resources (OER)?



Photos (L to R): TypoArt BS from [Pixabay](#), Rawpixel.com from [Pixabay](#), Olivier Le Moal from [Pixabay](#)

Why change the rule?

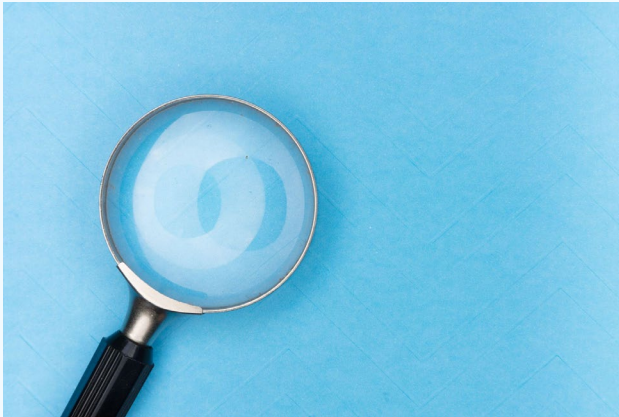
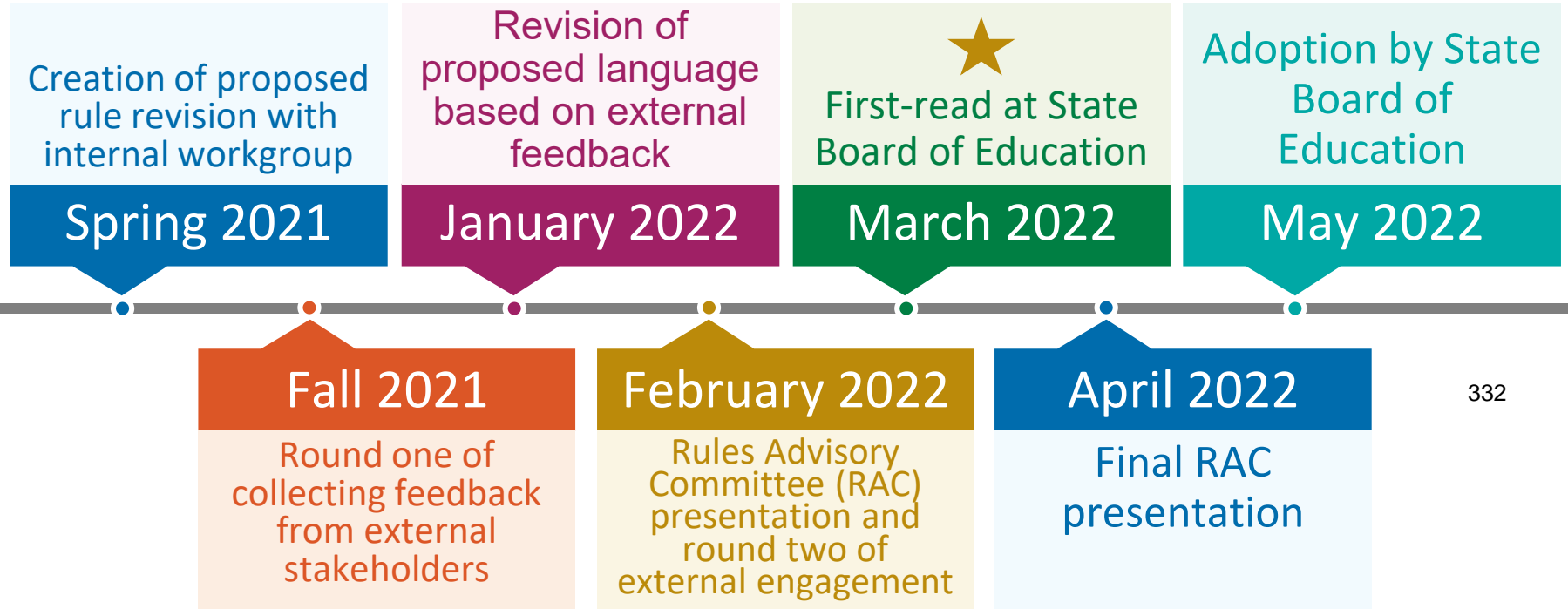


Photo by [Markus Winkler](#) on [Unsplash](#)

Oregon Department of Education

- Chapter 337 of Oregon Revised Statute instructs ODE to provide a waiver, pursuant to rules adopted by the State Board of Education.
- Eliminating fees for OER which meet the definition of "instructional materials" broadens access to ODE's process and increases the options available to districts.

Engagement and Rule Writing



Engagement



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Oregon Department of Education

- Office of Indian Education
- The Oregon Open Learning team
- Education Specialists within the Office of Teaching, Learning, and Assessment (OTLA)
- District and ESD curriculum leaders
- State Instructional Materials Review Association (SIMRA)
- OER Policy and Advocacy Workgroup

Feedback



Photo by [AbsolutVision](#) on [Unsplash](#)

Oregon Department of Education

This will **increase access to quality and representative texts** for our students. I believe this to be a win for our state.

OER intend for the materials to be **shared without cost** to the people using the materials, so it makes sense for the State to waive fees.

I think this is a great revision. OER hold **significant potential for Oregon students**, and barriers to finding good OER should be removed if possible. Waiving these fees is a good barrier to remove.

In general **reducing fees for submission of instructional materials seems like an effective strategy**. With high fees in place, some publishers simply aren't willing or able to pay the required fees, limiting options to be reviewed by ODE.

581-011-0090 Assessment of Submission Fees

Proposed addition to OAR 581 -0110090:

(5)(a) The Department of Education may waive the fee described in subsection (1) of this rule for an item of instructional material if the item is:

(A) A teaching and learning resource that resides in the public domain or that has been released under an intellectual property license that permits the free use and/or repurposing by others of the title or item;

(B) A basal instructional program as defined in OAR 581 -0110050; and

(C) Submitted in the format described in paragraph (A) of this subsection.

(b) The Department of Education may determine the number of waivers each year, no later than 90 days prior to the evaluation, based on the annual fee assessment.

(c) The submitter of instructional materials must request a waiver using forms provided by the Department of Education.

(d) The Department of Education shall prioritize waiver requests for materials described in subsection (5)(a) and for materials created by Oregon educators and school districts.

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Next Steps

- **March:** first-read for State Board of Education
- **April:** presentation to update RAC on feedback received and any changes to the proposed revision.
- **May:** Adoption by State Board of Education

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Questions?



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Oregon State Board of Education

March 17, 2022

AGENDA ITEM: 4.E.

<p>SUBJECT: Open Educational Resource (OER) Instructional Materials Fee Waiver (OAR 581-011-0090)</p> <p>STAFF NAME & OFFICE: Aujalee Moore, Office of Teaching, Learning, and Assessment (OTLA)</p> <p>Revision to OAR 581-011-0090 Assessment of Submission Fees permitting a fee waiver for instructional materials that are open educational resources (OER). This rule change is in response to a revision in Ch. 337 of Oregon Revised Statute allowing ODE to waive fees for teaching and learning resources that reside in the public domain and/or are licensed to allow the "free use and repurposing by others."</p> <p><input type="checkbox"/> New Rule <input checked="" type="checkbox"/> Amend Existing Rule <input type="checkbox"/> Repeal Rule</p>	<p><input checked="" type="checkbox"/> First Reading</p> <p><input checked="" type="checkbox"/> Presentation</p> <p><input type="checkbox"/> No Presentation</p> <p><input type="checkbox"/> Action</p> <p><input type="checkbox"/> Temp Rule</p> <p><input type="checkbox"/> Presentation</p> <p><input type="checkbox"/> No Presentation</p>
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BACKGROUND

On an annual basis, the Oregon Department of Education (ODE) conducts an evaluation and adoption of instructional materials for the content-area listed on the State Board of Education's adoption schedule. Currently, ODE only evaluates publisher submitted instructional materials, and publishers must pay an assessment fee in order to be evaluated in Oregon. Publisher fees are used to pay for the criteria development process and evaluation of materials each year.

In 2017, Chapter 337 of Oregon Revised Statute was amended to allow ODE to waive fees for teaching and learning resources that reside in the public domain and/or that are licensed to allow the "free use and repurposing by others." Such resources are commonly referred to as open educational resources (OER). [ORS 337.065](#) instructs the Department of Education to waive publisher fees for OER; however, the current rules do not.

SUMMARY OF PREVIOUS BOARD ACTION

In June 2016, [OAR 581-011-0080 Contract Forms and Authority](#) was revised to waive the bond requirement for approved instructional materials that qualify as OER. Once a publisher's materials have been approved for adoption, ODE may collect a bond or an irrevocable letter of credit up to \$10,000 from that publisher. The Department may collect a lower bond amount when the following conditions are met:

- (A) The materials under contract are Open Educational Resources; and
- (B) Are submitted for review in their free (\$0 cost to obtain content) format."

A rule change to [OAR 581-011-0090 Assessment of Submission Fees](#) that addresses Open Educational Resources has not been before the Board.

Oregon State Board of Education

March 17, 2022

AGENDA ITEM: 4.E.

HAS THE RULE CHANGED SINCE LAST BOARD MEETING?

- N/A; first read—hasn't been before board
- No; same as last month
- Yes – As follows:

POLICY ISSUE OR CONCERNS

ORS 337.065 instructs the Department of Education to waive publisher fees for OER; however, the current rules do not reflect the fee waiver language in OAR 581-011-0090. [OAR 581-011-0090 Assessment of Submission Fees](#) should be revised to include language about the fee waiver referenced in ORS 337.065.

There has been extensive education partner engagement, which began in November and remains ongoing, related to the rule revision. This engagement included the following:

- The Office of Indian Education has been consulted; they are in support of the revision and did not have modifications to offer related to the proposed revision.
- Internal to ODE, the Oregon Open Learning team and education specialists within the Office of Teaching, Learning, and Assessment have offered feedback and helped to iterate the language for the proposed rule revision.
- Feedback provided in writing via surveys sent to district and ESD curriculum leaders, State Instructional Materials Review Association (SIMRA), publishers of instructional materials, and the OER Policy and Advocacy Workgroup was overwhelmingly positive and indicated strong support from the field.
- Finally, the Rules Advisory Committee (RAC) has been engaged and offered feedback related to the proposed revision.

EQUITY IMPACT ANALYSIS

The proposed rule revision aligns with ODE's equity stance because OER support not only equity of access to high quality resources, they also enable a shift in the power structures that have historically driven the development of educational materials by broadening access to authorship, and supporting the inclusion of historically marginalized voices. The fee waiver for OER instructional materials will increase the presence of OER in K-12 Oregon schools.

In 2016 the Council of Chief State School Officers (CCSSO) reported that “students using open textbooks scored significantly higher on standardized tests than students using traditional textbooks.”¹ Available survey data suggest that many teachers perceive

¹Robinson, T. J., Fischer, L., Wiley, D., & Hilton, J. (2014). The impact of open textbooks on secondary science learning outcomes. *Educational Researcher*, 43(7), 341-351.

Oregon State Board of Education

March 17, 2022

AGENDA ITEM: 4.E.

OER as being higher quality than traditional curriculum materials, and teachers and students report that OER improve both instruction and student engagement.^{2 3}

Additionally, one of the benefits of OER is that many resources can be revised and adapted to meet the local and cultural context of specific students and classrooms. In order to compete in the national market, many commercial textbooks reflect systemic biases and reinforce the status quo. Due to the all rights reserved copyright that commercial materials are protected under, traditional textbooks do not have the adaptability that OER provides. The increased presence of OER in K-12 classrooms should increase culturally responsive instructional practices within Oregon classrooms.

FISCAL ANALYSIS

If OER are present on the State Board of Education approved lists of instructional materials, districts would be allowed to adopt the approved OER materials as their basal instructional materials. This would lead to significant cost-savings for districts each year. For districts that cite cost as a barrier to adopting instructional materials, this would increase the likelihood that up-to-date, high-quality materials are available in their classrooms. Additionally, even for districts who hold funds to invest in curriculum and instruction, the funds traditionally used on textbooks could then be invested into other areas such as professional development for teachers. The presence of OER on the approved list of instructional materials will be financially beneficial to districts that choose to adopt OER as their basal instructional materials.

EFFECT OF A “YES” OR “NO” VOTE

A “Yes” vote will revise OAR 581-011-0090 to allow OER publishers to obtain a waiver of submission fees to the evaluation and adoption process of instructional materials.

A vote of “No” will require all submitted instructional materials, both OER and non-OER, to be assessed the publisher fee during the evaluation and adoption process.

STAFF RECOMMENDATION

Approve Approve next month No recommendation at this time

Prompted by: State law changes Federal law changes other

ATTACHMENTS

² Kimmons, R. (2015). OER quality and adaptation in K–12: Comparing teacher evaluations of copyright-restricted, open, and open/adapted textbooks. *International Review of Research in Open and Distributed Learning*, 16(5), 39–57.

³ De los Arcos, B., Farrow, R., Pitt, R., Weller, M., & McAndrew, P. (2016). Adapting the curriculum: How K–12 teachers perceive the role of open educational resources. *Journal of Online Learning Research*, 2(1), 23–40.

Oregon State Board of Education

March 17, 2022

AGENDA ITEM: 4.E.

Attachment 1: Proposed Rule Revision

581-021-0580 Definitions

The following definitions apply to OAR 581-021-0580 ~~to and~~ 581-0021-0584:

(1) "Assessment" means any of the measurements identified by the Department of Education and used to determine target language proficiency.

(2) "Biliteracy" or "biliterate" means the ability to demonstrate ~~a high level of~~ proficiency in reading, writing, listening, and speaking in ~~English and one or more world~~ two languages.

~~(3) "Multiliteracy" or "multiliterate" means the ability to demonstrate proficiency in reading, writing, listening, and speaking in three or more languages.~~

~~(34) "Oregon State Seal of Biliteracy" means a seal issued by the Deputy Superintendent of Public Instruction, or their representative, that certifies a student is biliterate, as defined in this rule in English and one or more world languages.~~

~~(5) "Oregon State Seal of Multiliteracy" means a seal issued by the Deputy Superintendent of Public Instruction, or their representative, that certifies a student is multiliterate, as defined in this rule.~~

~~(46) "Portfolio of evidence" means the body of work collected to demonstrate a high level of determine Biliteracy target language proficiency.~~

~~(5) "World language" means American Sign Language and languages other than English.~~

Statutory/Other Authority: ORS 326.051

Statutes/Other Implemented: ORS 326.051

581-021-0584 Oregon State Seals of Biliteracy and Multiliteracy

(1) The Department of Education shall develop a process by which school districts shall submit to the Department ~~information on all data required as proof for~~ each student who is a candidate for a State Seal of Biliteracy or State Seal of Multiliteracy.

(2) The Deputy Superintendent of Public Instruction, or their representative, shall award a State Seal of Biliteracy to a student who meets all of the following criteria:

(a) Completed all state and district graduation requirements; and

~~(b) Met the Essential Skills for reading and writing in English;~~

~~(c) Demonstrated proficiency in one-two or more world languages ~~other than English~~ in reading, writing, listening and speaking through:~~

~~(A) One or more examinations and passing scores for each that are identified by the Department of Education; or~~

~~(B) Work sample, body of evidence or portfolio.~~

(3) The Deputy Superintendent of Public Instruction, or their representative, shall award a State Seal of Multiliteracy to a student who meets all of the following criteria:

(a) Completed all state and district graduation requirements; and

(b) Demonstrated proficiency in three or more world languages in reading, writing, listening and speaking through:

(A) One or more examinations and passing scores for each that are identified by the Department of Education; or

(B) Work sample, body of evidence or portfolio.

(34) The Oregon Seal of Biliteracy is available to students who received a diploma, or will receive a diploma, in 2015-16 and future years.

(5) The Oregon Seal of Multiliteracy is available to students who received a diploma, or will receive a diploma, in 2021-22 and future years.) Notwithstanding subsection (2) of this rule, the Superintendent of Public Instruction shall award a State Seal of Biliteracy to student who was first enrolled in ninth grade in the 2017-18 or 2016-17 and meets all of the following criteria:

~~(a) Completed all state and district graduation requirements; and~~

~~(b) Demonstrated proficiency in one or more world languages other than English in reading, writing listening and speaking through:~~

~~(A) One or more examinations and passing scores for each that are identified by the Department of Education; or~~

~~(B) Work sample, body of evidence or portfolio.~~

Statutory/Other Authority: ORS 326.051

Statutes/Other Implemented: ORS 326.051

Oregon State Board of Education

March 17, 2022

AGENDA ITEM: 5.A.

<p>SUBJECT: Proposed rule changes to the Oregon State Seal of Biliteracy</p> <p>STAFF NAME & OFFICE: Taffy Carlisle, Office of Equity, Diversity and Inclusion Asst. Superintendent is Deborah Lange</p> <p>We request that the Board will remove the State Summative requirement for the Oregon State Seal of Biliteracy, place English as one of the many languages in which students can demonstrate proficiency, and create the Oregon State Seal of Multiliteracy.</p> <p><input type="checkbox"/> New Rule <input checked="" type="checkbox"/> Amend Existing Rule <input type="checkbox"/> Repeal Rule</p>	<p><input type="checkbox"/> First Reading <input type="checkbox"/> Presentation <input type="checkbox"/> No Presentation</p> <p><input checked="" type="checkbox"/> Action <input type="checkbox"/> Temp Rule <input checked="" type="checkbox"/> Presentation <input type="checkbox"/> No Presentation</p>
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BACKGROUND

Include the following points for new OARs, OAR updates or changes.

1. History:
 - a. What prompted the rule (why do we have it?) State law? Federal law? Incident? Why are changes/amendments being proposed?
 - i. *The rule was created to recognize and award the Oregon State Seal of Biliteracy Oregon (OSSB) students, who demonstrate proficiency in English and another language.*
 - ii. *There are several rule changes recommended:*
 1. *To remove the State Summative requirement for the Biliteracy Seal for the 2022 graduating students.*
 2. *To place English as one of the many languages in which a student can prove proficiency, thereby allowing students to demonstrate proficiency in any two languages to earn the OSSB.*
 3. *To move the State Summative to the list assessment options. Students would then use this assessment options to demonstrate proficiency in English, should they choose.*
 4. *To form the Oregon State Seal of Multiliteracy option under the Oregon State Seal of Biliteracy, to recognize students who are proficient in three or more languages.*
 - b. What is the current requirement in rule or statute?
 - i. *For a student to become a candidate for the Oregon State Seal of Biliteracy, that student would be required to pass the State Summative (SBAC/Essential Skills) assessment in reading and writing in English, meet all graduation requirements*

Oregon State Board of Education

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AGENDA ITEM: 5.A.

as outlined by the district, and score at the expected level proficiency in English and another language.

- c. Why is this rule being brought forward right now?
 - i. *In 2020 and 2021, the Board waived the State Summative (SBAC/Essential Skills) assessment due to COVID, thus waiving that criteria for the Biliteracy Seal. Due to instructional and assessment challenges faced by COVID in 2020-2021, high school students were not able to take the State Summative assessment, thereby denying them the ability to meet one of the criteria to earn the Biliteracy Seal.*
 - ii. *Students have faced similar challenges with instruction and access and it is believed that the waiver should be continued for the 2022 graduating class.*
 - iii. *Students come with a variety of linguistic skills to Oregon schools. They should be able to earn the OSSB in any two languages in which they are proficient, even when neither of those languages are English.*
 - iv. *There were 31 high school graduates who earned the OSSB in three languages in 2021. The formation of the Oregon State Seal of Multiliteracy will recognize their higher level of achievement and linguistic skills.*
2. Purpose
 - a. What function does the current rule hold?
 - i. *The current rule holds the requirement of English as one of the two languages for the OSSB and the function of the State Summative measurement of proficiency in reading and writing in English.*
 - b. How long has the rule been in place?
 - i. *This rule has been in place since the Board adopted it in April 2016.*
3. Does the board have any areas of discretion or is this strictly mirroring statute?
 - a. *We believe the Board has discretion in this matter, as we are asking for a continuance of a decision to waive the State Summative assessment for the OSSB, which the Board has already granted for graduating years 2020 and 2021.*
 - b. *The Board has the discretion to place all languages on equal footing and importance*
 - c. *The Board also has the discretion to create another level of the linguistic award by initiating the Oregon State Seal of Multiliteracy (OSSM).*
4. Stakeholder voice/input (individual and collective i.e., groups)
 - a. Who was involved in bringing this to the Board?
 - i. *OSSB external K-12 workgroup consisting of tribal representatives from the Education Departments of the Confederated Tribes of Grand Ronde and the Confederated Tribes of the Umatilla Indian Reservation, World Language & Title III/EL teachers, program administrators, district administration, and data teams.*
 - ii. *OSSB external Post-Secondary workgroup consisting of representatives from Chemeketa CC, George Fox U, and Linfield U.*
 - iii. *OSSB internal cross-office team with representation from the OEDI, OEII, OESO, and OTLA.*
 - iv. *EL Advisory Committee*
 - b. What did engagement in this process entail?
 - i. *Both external and internal workgroups have met several times this fall 2021. The external workgroup input was informed by the general OSSB district meeting in September 2021, a meeting in December 2021, and two meetings in January 2022. We also met with the EL Advisory Committee.*

Oregon State Board of Education

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AGENDA ITEM: 5.A.

- c. Who may be affected by this?
 - i. *Students preparing to graduate this spring 2022 are the most impacted if this waiver is not granted. They did not all have the opportunity to take the State Summative/Essential Skills assessment as juniors and cannot take it in their senior year. To meet this requirement, the school would have only 1 month to gather evidence on the student's proficiency in English reading and writing by portfolio process.*
 - ii. *Students graduating in years subsequent to 2022 will be affected by the removal of the State Summative as a required assessment and English language criteria and possibly earn the OSSB/OSSM in two or more languages, independent of the English language.*
- d. Whose voice is missing?
 - i. *Direct student voice.*
- e. What additional information does the Board need prior to moving forward?
 - i. *The Board may wish to review the previous waiver decision to know if it would make that recommendation again for the 2022 graduating OSSB candidates.*
 - ii. *In the past, the Board has ruled that the OSSB could not add another sticker to the diploma of students earning the award in three or more languages. By creating the OSSM, there would still be only one sticker seal to affix to the diploma, one certificate, and still have wording of the award on the student's transcript.*

SUMMARY OF PREVIOUS BOARD ACTION

- 1. Has this been before the board before? If so, what action did the board take?
 - a. *This was presented before the Board in January of 2022 for first read, with no action taken yet.*

HAS THE RULE CHANGED SINCE LAST BOARD MEETING?

- N/A; first read—hasn't been before board
- No; same as last month
- Yes – As follows:

POLICY ISSUE OR CONCERNS

These policy issues or concerns could be from the field, stakeholder groups, statements submitted during the comment period, or discussions among ODE staff. Consider the following questions:

- 1. Stakeholders
 - a. How have you intentionally involved stakeholders who are also members of communities affected by this rule?

Oregon State Board of Education

March 17, 2022

AGENDA ITEM: 5.A.

- of taking the State Summative/Essential Skills assessment opportunity when they were juniors in 2021.*
- ii. *This decision would also open the criteria for the OSSB/OSSM to any student proficient in two or more languages, without one of those languages required to be English.*
 - c. What is the impact on eliminating the opportunity or achievement gap?
 - i. This could eliminate gaps in achievement and recognition for skills students already possess.
 - d. Have all the potential unintended consequences been considered?
 - i. *Yes, if this opportunity for this waiver is not extended to the graduating class of 2022, there will be strong consequences in the reduced number of students eligible to earn the Oregon State Seal of Biliteracy.*
 - ii. *If the opportunity to remove English from the required language for the Biliteracy Seal, the decision would hide the vast literacy skills students may have in languages other than English.*
 - e. Does this rule advance the ESSA goals?
 - i. *We believe it does, as it removes the barrier of instruction and access to the 2022 graduating seniors in their missed opportunity to take the state assessment to prove reading and writing proficiency in English, especially due to COVID.*
 - ii. *We believe it also advances the ESSA goals of creating multilingual opportunities for students and empowering their skills to the fullest recognition.*
3. What are the barriers to more equitable outcomes, either:
- a. State or federally mandated?
 - b. Political?
 - c. Emotional?
 - a. *Access to the assessment was out of the student's control, and therefore, if the student had worked for years for this award, the student may feel strongly about the lack of opportunity to earn the award. There were enough emotional welfare concerns for our students that waiving the assessment would remove one of those concerns.*
 - b. *If the Biliteracy Seal was only in English and another language, students could feel a barrier to Biliteracy when they know they are literate in more than one language, that second just not being English.*
 - d. Financial?
 - a. *If the Board does not decide to continue the waiver for the 2022 graduating students and the English proof of proficiency remains, districts would need to rush instruction and scheduling for students to take a summative assessment in English or take a 3rd party assessment for cost and possibly pass some or all of that cost to students. Moving the State Summative assessment to the list of possible assessments, the State Summative assessment would be used as one way to prove English proficiency.*

Oregon State Board of Education

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- e. Programmatic? No.
 - a. *This would be a waiver for the OSSB/OSSM state and program-wide for 2022.*
 - b. *This would put all languages on the same footing by moving English to the list of languages from which students can demonstrate Biliteracy or Multiliteracy state and program-wide.*
 - c. *This would be the creation of the Oregon State Seal of Multiliteracy state and program-wide.*
- f. Language? No.
- g. Geography? No.
 - a. *These changes are requested for implementation statewide.*
- h. Size? No.
 - a. *These changes would be for districts of all sizes statewide.*

EQUITY IMPACT ANALYSIS (This section to be continued, but halted to get the docket topic submitted)

The following questions are designed to examine how the proposed rule, policy or action systematically affect historically underserved students and/or communities.

1. How are historically underserved populations impacted by this docket item?
 - a. Demonstrate how the rule changes, policy, or action could produce other unintended consequences not listed in the docket.
 - b. Refer to *Policy Issue or Concerns* and identify the historically underserved populations affected. Conduct a reflection and examination, which will and should answer 1a.
2. Examine the impact of the rule changes, policy, or action on historically underserved populations in Oregon. Describe this ongoing and/or foreseeable impact, using as much detail as possible.
3. Explain how the rule change, policy or action works toward improving achievement, opportunities and a sense of worthiness for underserved students?

FISCAL ANALYSIS

What is the fiscal impact of the proposed rule changes to the Department of Education, school districts, education service districts or schools? Use the following suggestions as a guide:

1. How does the proposed rule fit within the budget of the agency?
 - a. Which units/divisions/offices will be impacted and how?
 - i. The OEDII has been the funding source for the OSSB in the past, under HB 3499.
2. How does the proposed rule change impact school districts and ESDs?

Oregon State Board of Education

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AGENDA ITEM: 5.A.

- a. If the waiver from the Essential Skills requirement is not granted, districts and ESDs may be required to pay out of pocket for 3rd party English assessments for their students with limited time to schedule and assess.
3. How does the proposed rule change impact schools and other educational institutions?
 - a. If the waiver is granted, schools would not have to fund and schedule a 3rd party assessment for English proficiency.
4. Does the proposed rule change impact other stakeholders?
 - a. The proposed rule benefits other stakeholders in opening the availability for student recognition and linguistic diversity.
 - b. The proposed rule does not impact the post-secondary acceptance of the Oregon State Seal of Biliteracy.

EFFECT OF A “YES” OR “NO” VOTE

Explain the consequences of a Board approving or not approving the staff recommendation.

Should the Board effect a “YES” vote for these requests, it would waive the requirement for the Essential Skills assessment for the 2022 graduating students, thereby recognizing that they did not have access to the assessment and hold them harmless. It would also decentralize English as being a required language to prove Biliteracy. Lastly, a “YES” vote would allow districts to expand their Biliteracy Seal program to include additional students who may be bilingual or multilingual, but not yet proficient in English.

The effect of a “NO” vote would create an undo urgency and fiscal impact on districts and students when needing to, in a short turnaround, find and pay for an English proficiency assessment. In addition, the “NO” vote would deny students who are bilingual or multilingual in any combination of languages the honor of earning the Oregon State Seal of Biliteracy or the Oregon State Seal of Multiliteracy. It is important to recognize linguistic skill, whether one of the languages is English or not.

STAFF RECOMMENDATION

Approve Approve next month No recommendation at this time

Prompted by: State law changes Federal law changes other

ATTACHMENTS

Attachment 1:



Seal of Biliteracy/Seal of Multiliteracy

OAR 581-021-0580 and 581-021-0584

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Deb Lange, Assistant Superintendent
Taffy Carlisle, OSSB Coordinator
Office of Equity, Diversity, and Inclusion



Oregon State Seal of Biliteracy or Multiliteracy

OAR 581-021-0580

Subject: Oregon State Seal of Biliteracy

Concept:

- Waive the State ELA Summative requirement for students graduating in 2022
- Move the State ELA Summative from required elements list to the assessment options list (if students wish to demonstrate proficiency in English)
- Also, we are proposing the creation of a Seal of Multiliteracy, which would recognize literacy in three or more languages.

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Rule Changes

- Remove the State ELA Summative requirement and for students who wish to demonstrate English proficiency, they will use the State ELA Summative.
- Amends the rules to set all languages on equal footing to earn the Biliteracy Seal ³⁵³
- Removes the word “World” from World Languages
- Creates an Oregon State Seal of Multiliteracy for students who earn the award in three or more languages.
- Clarifies who issues the Oregon State Seal of Biliteracy/Multiliteracy

Oregon State Seal of Biliteracy or Multiliteracy OAR 581-021-0580 Timeline

Timeline:

- Since we last met with the Board -
 - February 2022
 - Met with the internal workgroup
 - Held two meetings with the external workgroup
 - Met with the EL Advisory Committee
 - March 2022
 - Meeting with State Board for 2nd Read

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Oregon State Seal of Biliteracy or Multiliteracy

OAR 581-021-0584

(3) The Oregon Seal of Biliteracy is available to students who received a diploma, or will receive a diploma, in 2015-2016 and future years.

(4) The Oregon Seal of Multiliteracy is available to students who received a diploma, or will receive a diploma, in 2022-2023 and future years.

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Feedback from the RAC and StateBoard

Enthusiasm for:

- The Oregon State Seal of Multiliteracy
- Putting all languages on equal footing when earning the OSSB/OSSM
- District level notification form for committee formation and communication plan

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Wonderings about:

- Access for students receiving modified diplomas
- Continued efforts around racial and linguistic equity
- State-level of expectation, guidance for dissemination of access and opportunity at the student level, and measurement of success
- Could the OSSB logo contain a more global map representation

Feedback from the External Workgroup

Enthusiasm for:

- The Oregon State Seal of Multiliteracy
- Opportunities to demonstrate Biliteracy in any two languages

Wonderings about:

- Access for students receiving modified diplomas
- Calibration of the portfolio rubric
- The clearer the OAR definitions, the more likely the transfer to higher education opportunities
- The State Summative is only a 2-domain assessment; while partner language assessments require all 4 domains

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Feedback from the EL Advisory Workgroup

Enthusiasm for:

- The support provided for districts to implement program
- The number of recipients who speak languages other than English
- The additional work that can/should be done to make the OSSB available

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Wonderings about:

- Why aren't all districts participating in the OSSB program? Could students participate, regardless of district connection?
- What about languages that do not have one or more language domains? Are they allowed to prove proficiency in the available language domains?
- How are students on modified diplomas accessing the OSSB?
- Could the OSSB program be publicized in lower grades to generate interest?

Oregon State Seal of Biliteracy or Multiliteracy

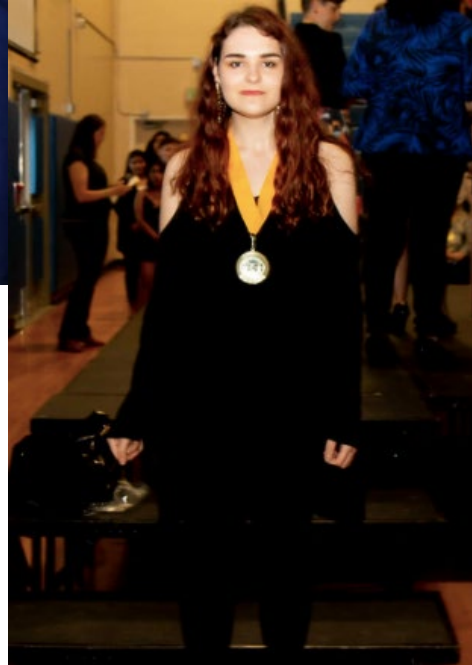
OAR 581-021-0580 and 581-021-0584

Next Steps:

- Build guidance and an evaluation plan at the district level on the new rules for statewide communication and improved pathways to access the OSSB/OSSM
- Build promotional materials for the Oregon State Seal of Multiliteracy
- Continue articulation work with HECC and state-wide post-secondary schools

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Biliteracy Seal Recipients and Bling



Thank You

Taffy Carlisle

Office of Equity, Diversity, and Inclusion

taffy.carlisle@ode.oregon.gov

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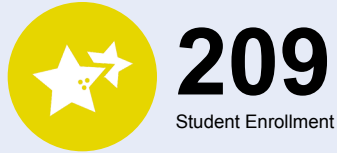


OREGON AT-A-GLANCE SCHOOL PROFILE Lighthouse Charter School

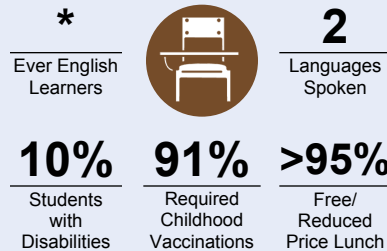
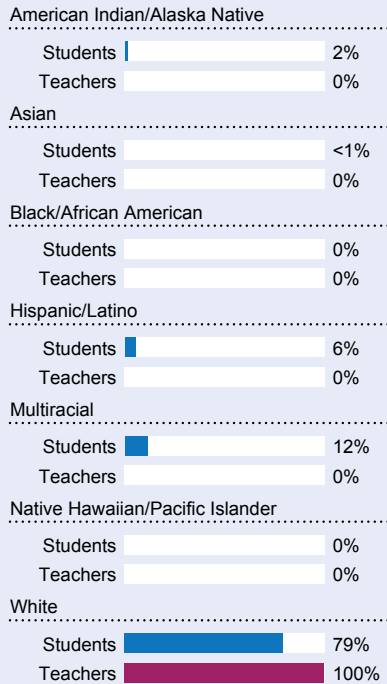
PRINCIPAL: Shelly Lake | GRADES: K-8 | 62858 HWY 101, Coos Bay 97420 | 541-751-1649



Students We Serve



DEMOGRAPHICS



*<10 students or data unavailable

Special Note

The At-A-Glance School and District profiles tell a story about Oregon's schools and districts. The story is harder to tell this year as the COVID-19 pandemic significantly impacted our schools and the data we collect...

Academic Success

ENGLISH LANGUAGE ARTS

Students meeting state grade-level expectations.

For 2020-21 English Language Arts data please visit:

www.oregon.gov/ode/schools-and-districts/reportcards/reportcards/Pages/Statewide-Assessment-Results-2021.aspx

School Environment

REGULAR ATTENDERS

Students who attended more than 90% of their enrolled school days.

For 2020-21 Regular Attenders data please visit:

www.oregon.gov/ode/schools-and-districts/reportcards/reportcards/Pages/Regular-Attenders-2021.aspx

MATHEMATICS

Students meeting state grade-level expectations.

For 2020-21 Mathematics data please visit:

www.oregon.gov/ode/schools-and-districts/reportcards/reportcards/Pages/Statewide-Assessment-Results-2021.aspx

Academic Progress

INDIVIDUAL STUDENT PROGRESS

Year-to-year progress in English language arts and mathematics.

Data not available in 2020-21

362

SCIENCE

Students meeting state grade-level expectations.

For 2020-21 Science data please visit:

www.oregon.gov/ode/schools-and-districts/reportcards/reportcards/Pages/Statewide-Assessment-Results-2021.aspx

School Goals

Our mission is to provide students and their families with a challenging and creative learning environment dedicated to academic excellence. The Lighthouse School utilizes an eclectic approach to holistic education.

State Goals

The Oregon Department of Education is partnering with school districts and local communities to ensure a 90% on-time, four year graduation rate by 2025.

Safe & Welcoming Environment

We are a K-8 school, with class sizes ranging from 20-26 students. Our small school environment encourages student accountability regarding both learning and behavior.



Outcomes

Our Staff (rounded FTE)



17 Teachers



1 Educational assistants



0 Counselors/ Psychologists



77% Average teacher retention rate



57% % of licensed teachers with more than 3 years of experience



No Same principal in the last 3 years

	REGULAR ATTENDERS	ENGLISH LANGUAGE ARTS	MATHEMATICS
American Indian/Alaska Native			
Asian			
Black/African American			
Hispanic/Latino			
Multiracial			
Native Hawaiian/Pacific Islander			
White			
Free/Reduced Price Lunch			
Ever English Learner			
Students with Disabilities			
Migrant			
Homeless			363
Talented and Gifted			
Female			
Male			
Non-Binary			

About Our School

BULLYING, HARASSMENT, AND SAFETY POLICIES

The Lighthouse School has a zero tolerance on bullying and we rise to challenge our school community with individual responsibility, perseverance, compassion and integrity. Bullying is identified as unwarranted, aggressive behavior directed towards someone. Bullying may have serious and lasting consequences that can result in: undue stress, absenteeism from school, the inability to focus in school and an increase in self-doubt or negative self-talk, and self-harm, among other things. The person who bullies needs help to stop the cycle of cruelty.

EXTRACURRICULAR ACTIVITIES

The Lighthouse School offers limited enrichment opportunities daily and weekly, which include experiences in the arts, foreign language and nature. In grade 6-8, students are offered elective classes which are attractive to, and reinforce, multiple learning styles.

PARENT ENGAGEMENT

The Lighthouse School was founded by parents in 2001 and parents continue to be highly involved in the governance and fundraising for our school. Volunteerism is an integral part of our daily routines and include activities such as: classroom help in reading, math, gardening, special events, festivals, and the maintenance of our nature trail.

COMMUNITY ENGAGEMENT

The Lighthouse School encourages community engagement through the Lighthouse Parent Organization (LPO) and through the Friends of the Lighthouse (FOLS) organizations. These organizations are vital in all areas of classroom enrichment, specialties course and maintaining our school's inclusive climate and culture.

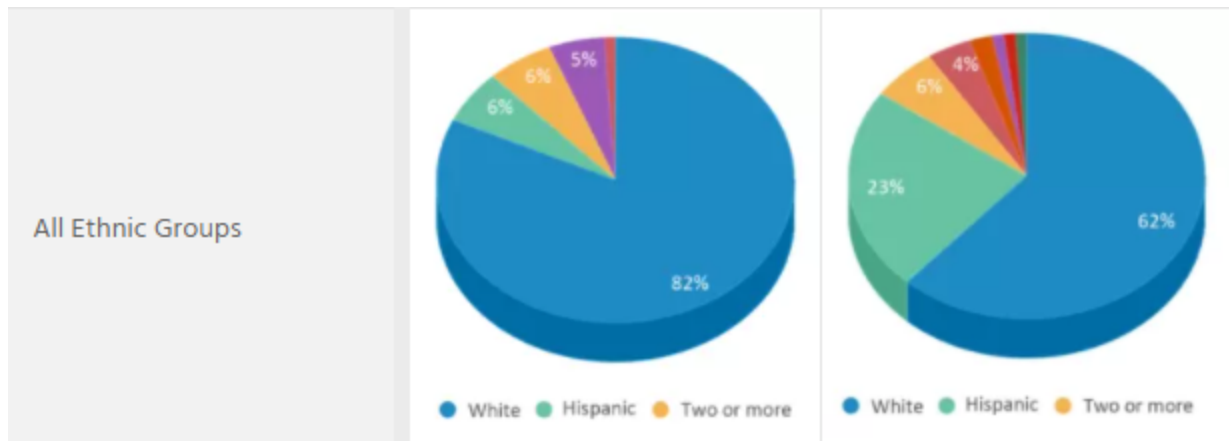
2021 Charter School Waiver Request Form

Charter School Overview	
Charter School Name	The Lighthouse School
Address	62858 US-101 Coos Bay, OR
Administrator Name	Shelley Lake
Contact Information	director@thelighthouseschool.org
School District	Coos Bay School District
Year School Opened	2002
Current Charter Contract Dates (Start and End Date)	7/7/2021-7/7/2026
Brief description of your charter school's educational model (max 500 characters)	The Lighthouse School (TLS) is an independent public Charter School within the Coos Bay School District. TLS is a K-8 with a class size cap at 26 students per class. Our small school environment allows for the integration of Waldorf philosophy through specialty classes to include: Music, Drama, Handwork, Spanish and Art. The school was founded in 2002 by Parents, and the incorporation of parent volunteers continue as an integral part of our school governance, fundraising, classroom activities and community building. Our mission is to “provide students and their families with a challenging and creative learning environment dedicated to academic excellence. Utilizing an eclectic approach to holistic education. Creating an atmosphere in which children can reach their social, creative and intellectual potential. TLS values and models compassion for all living things, respect for the environment, and an appreciation for a changing and diverse world. We nurture the whole child—head, heart and hands.
Waiver Request Summary	
What statute would you like the State Board to waive?	We are seeking a waiver to allow our enrollment to be more equitable to our surrounding area for all Coos County Residents including North Bend, Coquille, Reedsport, and Bandon who are left out after Coos Bay fills all of our registration.
Please summarize the waiver request (max 500 characters)	Resident District students enrolled in the Charter School will not exceed 65% of total Charter School enrollment unless the number of non-resident students enrolled in or applying for admission to, the Charter School is less than 35% of total Charter School enrollment, in which case the Charter School may enroll additional students seeking admission without regard to residency.
Waiver Request Detail	
1. Who are the racial/ethnic and underserved groups affected? What is the potential impact of the resource allocation and strategic investment to these groups?	
The Lighthouse School serves 215 students in Kindergarten-eighth grades. The Lighthouse Charter school placed in the bottom 50% in all Oregon schools for overall test scores. Our School is decreasing in ethical diversity due to the Coos Bay Priority enrollment. Minority enrollment is 19% of the student population (majority are Hispanic and American Indian) which is lower than the Oregon state average of 38% and lower than our surrounding districts. The diversity score of the Lighthouse Charter School is 0.34 and the school's diversity has stayed relatively flat over the last 5 school years. This waiver would allow the ethnic groups to	

have increased opportunity for enrollment in our school, not just from the Coos Bay School District, but through the inclusion of surrounding districts and communities as well.

The Lighthouse School district has the following diversity: 81.9% white, 5.4% Hispanic/Latino, 2.3% American Indian, 1.4% Asian, 0.5% Pacific Islander

The Lighthouse School has 35.3% of our students that qualify for free and reduced meals.



Our Sponsoring District has the following diversity: 73.9% White, 13.9% Hispanic/Latino, 3.6% Native American, 0.6% Asian, 0.5% Pacific Islander. Coos Bay School District has 58.8% of their students that qualify for free and reduced meals.

North Bend School District has the following diversity: 74.2% White, 11.5% Hispanic/Latino, 2.2% Native American, 1.9% Asian, 0.4% Pacific Islander. NBSD has 29.1% of their students that qualify for free and reduced meals.

Coquille School District has the following diversity: 75.1% White, 10.3% Hispanic/Latino, 2.5% Native American, 0.2% Pacific Islander, 0.3% African American. 58.2% of their student population qualifies for free and reduced meals.

Reedsport School District has the following diversity: 80.6% White, 8.9% Hispanic/Latino, 1.9% Native American, 0.6% Asian. Reedsport School district 66.8% of their student population qualify for free and reduced meals.

2. Does the decision being made ignore or worsen existing disparities or produce other unintended consequences? What is the impact on eliminating the opportunity gap?

The decision being made would not ignore or worsen existing disparities. We allow a viable option for families in our tribal community by providing bus transportation that would otherwise not be available to them. We have qualified for the Tribal grant for the past 5 years and utilized these funds in the areas of school security enhancement, gardens, a school nature trail, an outdoor classroom and other educational opportunities provided through the Tribe’s ongoing support. Our reading and literacy program is dedicated to the increased fluency of all students through the inclusion of explicit dyslexia interventions to all General education classrooms throughout kindergarten-eighth grade that are otherwise not available in surrounding districts

3. What are the barriers to more equitable outcomes? (E.g. mandated, political, emotional, financial, programmatic or managerial)

The Location of The Lighthouse Charter School and the limited transportation opportunities as provided through our sponsoring district limit the opportunity for financial and ethnic diversity. Therefore, as a charter we would be providing transportation for additional communities that exceed the immediate community. The school is expanding the bus routes in hopes to increase diversity. Particularly, the charter school will be including a bus route that stops near the Coquille Tribal center.

4. How have you intentionally involved stakeholders who are also members of the communities affected by the waiver request? How do present your information in questions (1), (2) and (3) to these stakeholders?

We provide all of our information to stakeholders through a variety of communication strategies, including but limited to: Email, Community input, charter negotiations with the sponsoring district, and public board meetings. Through the approval of this waiver, we hope to begin the intentional advertising of our school to include Coos County's surrounding school districts; North Bend, Reedsport, Coquille and Bandon, as well as our local coast guard facilities and The Coquille Tribal Center. Many of our intermediate students are from The North Bend area as North Bend was our previous Sponsoring School district prior to our school creating our current charter agreement with Coos Bay School District. The purpose behind our district transfer was intentional design for expansion and building capacity.

5. How will you modify or enhance your strategies to ensure each students' and communities' individual and cultural needs are met?

The Charter has established alternative bussing strategies, and seeks the state waiver to increase diversity for enrollment outside of the limited allotment as provided through CBSD. Our school has included intense teacher training in the areas of Reading and math interventions, hired an additional reading coach, and contracted with second language educators to include ASL in grade K-1 and Spanish in grade 1-8. Our school culture meets the needs through Waldorf inspired education including specialties course(s) in the areas of drama, art and music in all of our K-8 grades. As a school we encourage and depend on parent volunteers through our Lighthouse Parent Organization as well as through community investors in our Friends of the Lighthouse Organization.

6. How are you collecting data on race, ethnicity, and native language?

TLS collects data on race, ethnicity and native languages through our Annual Student Enrollment forms.

7. What is your commitment to P-20 professional learning for equity? What resources are you allocating for training in culturally responsive instruction?

TLS Teachers and staff are trained through PACE and Vector Solutions in all areas of school safety and child welfare. Our curriculum trainings are in the area of Reading Horizons and JumpMath for focused interventions in the areas of ELA and Math for the inclusion of academic growth and safe school compliances. We have prioritized equity focused training through the inclusion Coos Health and Wellness and through the ODE Care and Connect week to enhance our Staff's SEL instruction. TLS has adopted a Cyber Civics curriculum in our 6-8 grades for inclusion and prevention strategies applicable for all of our middle school students. TLS offers sensory support and has since hired additional administration through our Dean of Students to include school wide PBIS training and implementation.

Data Collection

All charter schools with approved waivers will be required to report the impact of the wavier annually to the State Board. What is the charter school's plan for collecting data on how the proposed waiver will impact students and the quality of education? The plan must minimally include disaggregated data by student demographics and stakeholder engagement.

The school will keep record of students' data for the period of 5 years per the charter agreement.

Sponsor Acknowledgment

The State Board is interested to understand the charter school sponsor's position on the waiver request. Please include evidence that the sponsor acknowledges being notified of the waiver request and whether or not the sponsor is in favor of the request.

Resident District students enrolled in the Charter School will not exceed 65% of total Charter School enrollment unless the number of non-resident students enrolled in or applying for admission to, the Charter School is less than 35% of total Charter School enrollment, in which case the Charter School may enroll additional students seeking admission without regard to residency. Included as separate attachment



COOS BAY PUBLIC SCHOOLS

One Team, One Goal!

"Preparing all of our kids for a successful future."

8/25/2021

This letter is in support of the waiver for The Lighthouse Charter School to open enrollment to all families, in accordance with our charter agreement. Coos Bay School District supports this process as long as the parameters are followed, and the percentage of in-district students does not dip below 65%. If you have questions, please reach out to me.

Sincerely,

Bryan Trendell
Coos Bay Public Schools
Superintendent
541-267-1309
bryant@coos-bay.k12.or.us

Oregon State Board of Education

March 17, 2022

AGENDA ITEM: 5.C.

<p>SUBJECT: The Lighthouse School Public Charter School Waiver Request</p> <p>STAFF NAME & OFFICE: Kate Pattison & Emily Nazarov, Government and Legal Affairs, Director’s Office; John Gibson, The Lighthouse School Board President</p> <p>The Lighthouse School is requesting a waiver of the enrollment requirements for resident and nonresident students in ORS 338.125(2)(a)-(b) allowing up to 35% of the total enrollment to be reserved for nonresident students.</p>	<p><input type="checkbox"/> First Reading</p> <p><input type="checkbox"/> Presentation</p> <p><input type="checkbox"/> No Presentation</p> <p><input checked="" type="checkbox"/> Action</p> <p><input type="checkbox"/> Temp Rule</p> <p><input checked="" type="checkbox"/> Presentation</p> <p><input type="checkbox"/> No Presentation</p>
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BACKGROUND

Public Charter School Waivers

The State Board of Education has been granted the authority to waive certain provisions of the Public Charter School Statutes in [ORS Chapter 338](#). The standards and process for requesting a waiver of ORS 338 have been set forth in [OAR 581-026-0130](#) and the 2020 Process to Request a Charter School Waiver.

ORS 338.025 Rules; waiver of provisions of chapter; exceptions.

- (1) The State Board of Education may adopt any rules necessary for the implementation of this chapter. The rules shall follow the intent of this chapter.
- (2) Upon application by a public charter school, the State Board of Education may grant a waiver of any provision of this chapter if the waiver promotes the development of programs by providers, enhances the equitable access by underserved families to the public education of their choice, extends the equitable access to public support by all students or permits high quality programs of unusual cost. The State Board of Education may not waive any appeal provision in this chapter or any provision under ORS 338.115 (1)(a) to (aa), 338.120, 338.125 (4), 338.135 (2)(b) or 339.122.

OAR 581-026-0130: Procedure to Waive Certain Provisions of the Charter School Law

- (1) A public charter school may petition the State Board of Education for a waiver of any provision of ORS 388. The written petition must specify the reason(s) the charter school is seeking the waiver and any other relevant information.
- (2) The public charter school must notify the sponsor if a waiver under this section is being considered. Waivers granted by the State Board to a charter school may require amending the charter under the provisions of OAR 581-026-0100 (7).
- (3) The State Board of Education, upon receipt of a waiver petition, will review the petition and may grant the waiver upon a showing that approving the waiver would:
 - (a) Promote the development of programs by providers;
 - (b) Enhance the equitable access by underserved families to the public education of their choice;
 - (c) Extend the equitable access to public support by all students; or
 - (d) Permit the development of high quality programs of unusual cost.
- (4) The State Board of Education may not waive any review provision under the Act or any provision under ORS 338.115(1).

Oregon State Board of Education

March 17, 2022

AGENDA ITEM: 5.C.

ODE Staff Analysis of Waiver Request

The charter school is requesting to waive ORS 338.125(2)(a)-(b), which provides students who reside in the district where the charter school is located (resident students) to have first access to enroll in the charter school if space is available. Then, if additional space is available, students who do not reside in the school district (nonresident students) may be enrolled. The school is requesting to waive the requirement to allow up to 35% of the school's total enrollment to be made available to nonresident students. In recent years, there has been more demand from resident students resulting in limited to no access to nonresident students. The school hopes to create and maintain access for nonresident students who want to enroll. The Lighthouse School is currently located within and sponsored by the Coos Bay SD. Originally, the school was established within the North Bend SD but closed and reopened in Coos Bay SD when the current facility became available. Since the move to Coos Bay SD, fewer students from neighboring districts have been able to enroll in the school.

ORS 338.125 Student enrollment; nonresident students; appeals; written notices. (1) Student enrollment in a public charter school is voluntary.

(2)(a) All students who reside in the school district in which the public charter school is located are eligible for enrollment in the public charter school if space is available.

(b) Students who do not reside in the school district in which the public charter school is located are eligible for enrollment in the public charter school if space is available

SUMMARY OF PREVIOUS BOARD ACTION

The State Board of Education has granted four previous waivers for The Lighthouse School.

April 2002	Waived ORS 338.155 and the 80% minimum funding to allow for in-kind services.
April 2002	Waived ORS 338.125 and allowed priority enrollment for children of founders.
April 2006	Waived ORS 338.135 and allowed additional TSPC licenses to count toward the 50% requirement for the 2006-07 school year only.
May 2017	Waived ORS 338.125 and allowed all students who had been enrolled in the school under North Bend SD sponsorship to have priority enrollment in the initial year of operation under Coos Bay SD sponsorship.

This was before the Board as a first read in December 2021.

POLICY ISSUE OR CONCERNS

The State Board has considered and approved five similar requests since 1999. The original charter school statute required at least 80% of a charter school's enrollment to be made up of resident students. Between 1999 and 2004, the State Board approved five requests to waive this requirement and allow more nonresident students to enroll if space was available. This statute was eventually amended and the 80% requirement was removed. Currently, statute allows resident students priority over nonresident students as space allows.

Across the state, some charter schools and their sponsor districts negotiate caps on resident students and nonresident students within their charter contracts. These contractual caps dictate if "space is

Oregon State Board of Education

March 17, 2022

AGENDA ITEM: 5.C.

available” to each group of students. This charter school and sponsor district are requesting a waiver to ensure the policy to limit resident student enrollment is formally allowed by State Board waiver.

The Board asked The Lighthouse School staff questions that required follow-up during the December 2021 meeting. Below are the questions and responses from the charter school.

How will this waiver change the number of underserved students who have access to your school? The Lighthouse School is a school of choice. Parents must go through the enrollment process and be drawn by lottery. However, the choice becomes preferential for families of the district. The underserved families of Surrounding districts who understand what we do and how we do it are placed at the very bottom of the list, if they aren’t dejected by the wait times and turnover.

What is the possibility for expanding the school's program?

We would love to expand but under the current priority, the underserved for surrounding districts would need to understand that they would receive equal opportunity of admission.

What is the percentage of students in our school by district?

- 72% Coos Bay School District (Sponsoring district)
- 26% North Bend School District (Former sponsoring school district)
- 2% Coquille School District

As stated before, our concern is not the current make-up, however the future percentage break down as the waiver request would primarily impact our entering kindergarten class. We have a lottery for 24 students with the current priority going to CBSD students.

- Kindergarten 2021-22 has 83% CBSD and 17% NBSD
- Kindergarten 2020-21 had 72% CBSD and 28% NBSD
- Kindergarten 2019-20 81% CBSD and 19% NBSD

It should also be noted that in the 3 years listed above, the NBSD percentages are siblings of older students who attended The Lighthouse School when NBSD was our sponsoring district and therefore get priority otherwise they would be drawn from the lottery AFTER CBSD students.

EQUITY IMPACT ANALYSIS

See application narrative provided by the requestor.

FISCAL ANALYSIS

There is no fiscal impact on the Department or the State Board of Education.

EFFECT OF A “YES” OR “NO” VOTE

Yes = If the Board grants the waiver as requested, The Lighthouse School will be allowed to offer priority enrollment of up to 35% of the total enrollment for nonresident students through the lottery process.

Oregon State Board of Education

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AGENDA ITEM: 5.C.

No = If the Board denies the waiver as requested, The Lighthouse School must continue to comply with ORS 338.125(2) and enroll resident students first and then nonresident students if space is available.

ATTACHMENTS

Attachment 1: Lighthouse School Waiver Request

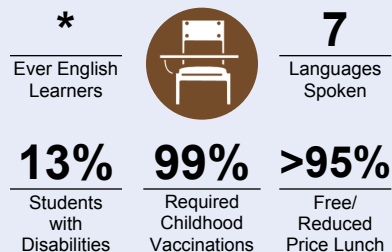
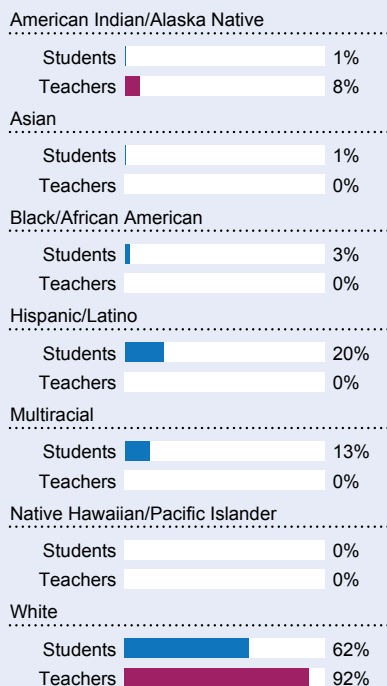
Attachment 2: Lighthouse Waiver SD Letter

Attachment 3: 2020-21 Lighthouse School Profile

Students We Serve



DEMOGRAPHICS



*<10 students or data unavailable

Special Note

The At-A-Glance School and District profiles tell a story about Oregon's schools and districts. The story is harder to tell this year as the COVID-19 pandemic significantly impacted our schools and the data we collect. As a result, statewide assessment and attendance data cannot be compared to prior years and are not shown here. We have included links to our website where you can view the 2020-21 statewide assessment and attendance data and read a detailed description of how these data were impacted. We're thankful for your partnership as we focus on care, connection and the creation of safe, inclusive and supportive learning environments.

Academic Success

ENGLISH LANGUAGE ARTS

Students meeting state grade-level expectations.

For 2020-21 English Language Arts data please visit:

www.oregon.gov/ode/schools-and-districts/reportcards/reportcards/Pages/Statewide-Assessment-Results-2021.aspx

School Environment

REGULAR ATTENDERS

Students who attended more than 90% of their enrolled school days.

For 2020-21 Regular Attenders data please visit:

www.oregon.gov/ode/schools-and-districts/reportcards/reportcards/Pages/Regular-Attenders-2021.aspx

MATHEMATICS

Students meeting state grade-level expectations.

For 2020-21 Mathematics data please visit:

www.oregon.gov/ode/schools-and-districts/reportcards/reportcards/Pages/Statewide-Assessment-Results-2021.aspx

Academic Progress

INDIVIDUAL STUDENT PROGRESS

Year-to-year progress in English language arts and mathematics.

Data not available in 2020-21

373

SCIENCE

Students meeting state grade-level expectations.

For 2020-21 Science data please visit:

www.oregon.gov/ode/schools-and-districts/reportcards/reportcards/Pages/Statewide-Assessment-Results-2021.aspx

School Goals

Our school is committed to helping every child reach their goals. Through MicroSociety classes, engaging classroom instruction, schoolwide behavior expectations, targeted interventions, and family engagement, we see growth for our students. As we strive to increase the number of students who regularly attend school, we will collaborate with community partners to help families overcome barriers that affect school attendance.

State Goals

The Oregon Department of Education is partnering with school districts and local communities to ensure a 90% on-time, four year graduation rate by 2025. To progress toward this goal, the state will prioritize efforts to improve attendance, provide a well-rounded education, invest in implementing culturally responsive practices, and promote continuous improvement to close opportunity and achievement gaps for historically and currently underserved students.

Safe & Welcoming Environment

At Eagle Charter School, it is important to us that all of our students and their families feel safe, welcomed and included. Everyone is welcome in our school regardless of race, gender identity, sexuality, immigration status, country of origin or other factors. Everyone is entitled to academic success regardless of their background or family circumstances and each student will be provided the necessary supports to ensure that success. We want students to focus on learning without fear of discrimination or harassment. Thank you for making our school a safe and welcoming place for everyone.



OREGON AT-A-GLANCE SCHOOL PROFILE CONTINUED

Eagle Charter School

Outcomes

Our Staff (rounded FTE)



7

Teachers



2

Educational assistants



<1

Counselors/
Psychologists



70%

Average teacher retention rate



78%

% of licensed teachers with more than 3 years of experience



Yes

Same principal in the last 3 years

	REGULAR ATTENDERS	ENGLISH LANGUAGE ARTS	MATHEMATICS
American Indian/Alaska Native			
Asian			
Black/African American			
Hispanic/Latino			
Multiracial			
Native Hawaiian/Pacific Islander			
White			
Free/Reduced Price Lunch			
Ever English Learner			
Students with Disabilities			
Migrant			
Homeless			
Talented and Gifted			
Female			
Male			
Non-Binary			
			374

About Our School

BULLYING, HARASSMENT, AND SAFETY POLICIES

The safety of our children is our greatest priority. Everyone is welcome in our schools regardless of race, gender identity, sexuality, immigration status, country of origin or other factors. We work collaboratively to ensure all students feel safe and free from hazing, harassment, intimidation, discrimination, bullying and menacing.

Our school staff create lessons to raise awareness about bullying and how to prevent and respond to it if witnessed. We have also joined SafeOregon, a statewide platform to report unsafe behaviors to authorities who help us investigate every report.

EXTRACURRICULAR ACTIVITIES

Enrichment Academy Program provided in partnership with the YMCA.

PARENT ENGAGEMENT

Our school strives to partner with parents and families to support success for all students. There are many opportunities to get involved.

- Parent Club
- Monthly parent information meetings
- Volunteer at school events
- Guest speaker for MicroSociety

COMMUNITY ENGAGEMENT

We partner with local businesses, non-profit organizations, and community members to enhance our education programs and support families. We were also able to provide a field trip for each grade level with sponsorship from business partners. Call us to learn more about opportunities to get involved. Volunteer
Donate supplies
Sponsor an event

Eagle Student Demographic Information - 3 Year Comparison

	2019-2020	2020-2021	2021-2022
Enrollment	144	141	135
Race/Ethnicity*			
White	62%	61%	71%
Hispanic/Latinx	21%	10%	12%
Black/African American	8%	2%	10%
Asian	3%	2%	3%
American Indian/Alaskan Native	3%	<1%	<1%
Hawaiian/Pacific Islander	3%	2%	<3%
Multiracial	*	23%	*
Languages Spoken			
	English, Spanish, Russian, German, Telugu, Vietnamese, Hawaiian	English, Spanish, Russian, German, Ukrainian, Telugu, Vietnamese, ASL, Hawaiian, French	English, Spanish, Russian, German, Ukrainian, Telugu, Vietnamese, ASL, Hawaiian, French
Gender			
Male	49.3%	46%	49.6%
Female	50%	54%	50.4%
Nonbinary	<1%	0	0
Economically disadvantaged			
	43%	60%**	56.5%
Special Education			
	19%	25%	22.5%***
EL			
		17%	12.5%
TAG			
	0%	0%	<1%

*ODE only counts students in one category, so while a student may personally identify as a member of a particular group, they may not necessarily be counted in that group by the state (example: a student who identifies as Pacific Islander but is listed as Multiracial by the state). Eagle's demographic information for 2019-2020 is based on how parents self-identified.

**Eagle staff delivered weekly food boxes to 24% of the Eagle student body through December 2020.

***This total does not include students who are currently going through the identification process but have not yet been found eligible.

Eagle Staff Demographic Information

	2019-2020	2020-2021	2021-2022
Number of Staff*	20	21	21
Total FTE	14.5	14	15.5
Licensed Staff	13	14	14
Classified Staff	6	6	6
Administration	1	1	1
Race/Ethnicity			
White	18	18	18
Hispanic/Latinx	1	1	1
Black/African American	0	0	0
Asian	0	0	0
American Indian/Alaskan Native	1	1	2
Hawaiian/Pacific Islander	0	0	0
Multiracial	0	0	0
Languages Spoken			
	English, Spanish	English, Spanish, Russian	English, Spanish
Gender			
Male	5	5	5
Female	15	16	16
Nonbinary	0	0	0

*Special education staff provided by Salem-Keizer through an MOU with Eagle Charter. The LRC teacher is counted in Eagle's total FTE, the SLP teacher is not.

The number of staff is calculated in February of each school year.



Oregon

Kate Brown, Governor



OREGON
DEPARTMENT OF
EDUCATION

Oregon achieves . . . together!

Colt Gill

Director of the Oregon Department of Education

BEFORE THE OREGON STATE BOARD OF EDUCATION

PUBLIC HEARING: Renewal Request for Eagle Charter School

HEARING OFFICER'S REPORT

The Department held a public hearing on February 1, 2022 from 6:00 – 7:00PM, to receive public comment on the renewal request for the Eagle Charter School. Notice of hearing was published in a timely manner and was sent to interested parties and persons who requested notice. The public hearing was necessary to comply with ORS 338.065(5)(c). The hearing was held online via Zoom before Kate Pattison, Hearing Officer. Corey Rosenberg, State Board of Education Administrator, also represented the Department at the hearing. Vice Chair Guadalupe Martinez Zapata was in attendance for the State Board.

A sign-up form was shared with interested parties with notice of the hearing and allowed members of the community to provide written testimony or indicate interest in speaking at the hearing.

18 adults and one student attended the public hearing.

9 people spoke at the public hearing. Everyone who spoke was in favor of the renewal of the charter school.

14 people submitted written testimony in advance of the public hearing. No one provided written testimony that was opposed to the renewal.

Parents expressed high levels of satisfaction with the school and reported it was the best fit for their child. Many reported higher levels of engagement with school at Eagle than experienced at previous schools.

Public testimony provided high level of support for how the teaching staff and school leadership navigated the COVID-19 pandemic response.

[Full text from written testimony.](#)

Respectfully submitted this 7th day of March, 2020

Kate Pattison, Hearing Officer

Eagle Charter School – Charter Renewal Application, January 1, 2022

I. Executive Summary

Demographic Information (Find a 3 year comparison of staff and student demographics [here.](#))

Current Year Enrollment & Demographic Information	
Total Enrollment	
Grades Served	K-5
# of Students Enrolled	135
# of Students on Waiting List	8
Gender	
# Male	67
# Female	68
# Nonbinary	0
Ethnicity/Race	
# White	98
# Black	13
# Hispanic	16
# Asian	4
# Other	4
Special Populations	
# Students with Disabilities	30
# English Language Learners	17
# Homeless Students	0
# Eligible for Free and Reduced Lunch	77
Projected Enrollment and Grades Served	
Total Enrollment	
Projected Grades Served	K-6
Maximum Projected Enrollment	168

Mission/Vision

Eagle Charter School is a miniature replica of the global society, bringing real-life experiences into the classroom. Hands-on activities, student-initiated ventures, and traditional coursework combine to encourage student investment in the learning process, engage diverse needs, and ensure high academic standards.

Eagle Charter School is focused on promoting a safe, respectful, equitable society by empowering students with knowledge and tools to succeed. In order to achieve this focus, the Eagle School Board started the IDEA (Inclusion, Diversity, Equity, and Access) Committee, which has a specific mission, vision, and core values. These guide Eagle in meeting its goals of empowered, educated citizens who have knowledge and experience to improve their community and the world.

Mission: To apply an equity lens to the entire Eagle Charter School community to ensure full inclusion and access.

Vision: We envision a school where systemic inequalities are challenged regularly to remove barriers and improve outcomes for students and the community.

Core Values: We honor the uniqueness of each individual and embrace diverse backgrounds, cultures, traditions, values, and points of view to build a *kind*, strong, and inclusive community, and to prepare students for lives in a multicultural society.

Educational Program: MicroSociety

At Eagle, we believe that students benefit when they are exposed to real-world learning experiences. As members of a MicroSociety, students create and operate businesses and non-profit organizations, produce goods and services, manage inventory, market and sell products and services, and adjust to meet customer demand. Eagle Charter School uses traditional academic methods in concert with the MicroSociety Program to involve students in their education. Students become leaders, business managers, workers, non-profit board members, consumers, bankers, legislators, judges, peace officers, journalists, and more. In doing so, students create and take part in every aspect of a model society and are better prepared for life in the “real world” after elementary school.

Changes due to the COVID-19 Pandemic

Prior to the pandemic, Eagle’s MicroSociety classes were daily, mixed grade-level classes that focused on student-driven business, non-profit, and governmental experiences. Students in grades 1-5 worked together in classes and this daily interaction built a tight-knit community where students saw themselves as friends working for a common goal; staff saw this as a primary contributor to our positive school atmosphere that focused on kindness. Students were able to demonstrate leadership, with some as young as second grade taking Management 101 or Government 101 classes and learning to be leaders among their peers.

The shift to distance learning meant that MicroSociety also had to change. For the 2020-2021 school year, Eagle staff created community-centered themes that had a different focus every two months. Staff members took turns teaching online lessons to all students on a weekly basis. Students participated in schoolwide virtual field trips and virtual assemblies with guest speakers.

In 2021-2022, students were back to in-person learning, but COVID restrictions did not allow for mixed-grade (mixed-cohort) classes. For that reason, Eagle kept some of the aspects from distance learning – sharing the responsibility for lesson planning and teaching across staff – and continued with a community focus and weekly theme. The first part of the year lays the foundation for students to begin businesses and nonprofits in February. This year, each classroom will have a literacy focus; businesses and nonprofits will create newsletters, books, or tv stations so that they can share their creations with other classes while maintaining COVID-safe protocols.

In future years, Eagle plans to continue its community-centered approach to MicroSociety even as we return to multi-grade, blended, experiential learning after the pandemic.

Community & Local Connections

Every year, Eagle Charter has worked to partner with local businesses and take students on field trips so that they can learn more about businesses in their community and apply that learning to their MicroSociety classes. The COVID-19 pandemic caused some of this to shift. While students could no longer visit local businesses for in-person field trips, the use of technology to connect Eagle with the outside world opened up many opportunities. Eagle students were able to attend virtual assemblies with local and international authors, participate in field trips for local and national businesses, and interview adults in a wide variety of careers, all from the safety of their home (2020-2021) or classroom (2021-2022). The flexibility Eagle found using technology to connect the school to the broader world has been very beneficial and Eagle plans to continue connecting in this way even after the pandemic ends.

Leadership & Governance

Eagle has had stable board leadership since prior to the COVID-19 lockdown. Our board is currently composed of four non-parents and two parents. There is one open position on the board and no currently anticipated changes. The bylaws governing the Eagle school board state that parent members shall make up no more than half of the governing board; the rest of the board must be non-parents. Recently, the board used OSBA to update/rewrite school policies to ensure that Eagle is in compliance with all required policies. Eagle's school board has repeatedly demonstrated its commitment to and support of the school staff throughout the COVID-19 pandemic.

Eagle has an active, involved Parent Club that managed to survive and thrive even through the COVID lockdown. Throughout the 2020-2021 school year, the Eagle Parent Club met regularly on Zoom, hosted Zoom play dates and schoolwide activities, and had a monthly fundraiser (bottle drop). With the return to in-person learning, the Parent Club moved to hybrid offerings; the monthly meetings are held in person (following all COVID protocols) and on Zoom and hosted events are also planned as hybrid experiences.

Eagle has had stable instructional staff during the pandemic. All of the teaching staff that were with Eagle when COVID-19 caused a lockdown in March 2020 have remained at the school. While most of the staff have been hired since August 2018 and are new since the last charter renewal, they are committed to Eagle and its long-term growth and success. In addition to the teaching staff, Eagle increased its instructional support and its special education support to help students recover from the COVID-19 lockdown and its aftermath. It is the hope that education will be properly funded in the wake of the pandemic so that Eagle can keep its increased staffing and thus its capacity to meet the various needs of all students.

II. Looking Back: The Record of Performance

Eagle Charter School underwent a charter review in early 2020 just as the COVID-19 pandemic began. The review was extensive and ended in April 2020, so this look back will cover what has happened at Eagle since that time. For information prior to April 2020, please review the data and documents submitted as part of the midpoint review.

Students have not been able to participate in the Smarter Balanced assessments since spring 2019 due to the COVID-19 pandemic. In order to track student progress toward grade-level standards, Eagle Charter uses iReady diagnostics several times each year as well as easyCBM data, DRA data, and teacher-created formative assessments. Please see the folder on [Academics & Assessments](#) for several examples of data.

Pandemic Observations

Eagle Charter School staff do not consider the iReady diagnostic data from 2020-2021 to be valid because much of the year was spent in distance learning and numerous caregivers were “helping” their children complete the assessments. For that reason, staff determined to use data from the 2021-2022 school year as a more accurate reflection of students’ knowledge and understanding.

Students returning to in-person learning after over a year of distance and hybrid learning struggle in many ways. As noted in many news and opinion articles around the country in the fall of 2021, students’ maturity appears to be about 1.5-2 years younger than expected in a typical year; fifth grade students act as third graders, kindergarten students behave more like toddlers. The social impact of a lengthy pandemic is significant. This in turn affects academics; for example, when kindergarten students do not know how to listen, take turns, follow directions, or even hold a pencil and they present developmentally more like 2-3 year olds, it takes longer to teach basic lessons and academic progress is slower. For upper grades, the maturity and developmental level plays a role in how quickly a teacher can move a group through a standard; teachers are also finding gaps in student knowledge and understanding. While most Eagle students [attended](#) distance (and later hybrid) learning regularly, many students needed a more hands-on approach with manipulative learning tools to help them solidify their understanding of certain concepts and this was more difficult in such a setting.

When the Oregon Legislature offered summer learning grants to schools in 2021, Eagle decided to offer its first summer enrichment program, which was designed to reach up to 114 Eagle students (80% of the student body). We had 85 students enrolled over two sessions, which is 59% of the student body. In the weeks leading up to summer enrichment, we contacted families daily (phone, email) to encourage them to sign up and worked with several families who had originally said no because of transportation issues to solve the challenge and have the students attend. We opened our available spots to students outside of Eagle (after receiving permission from ODE to do so) and so had several non-Eagle students attend because they learned about the opportunity through family members. Students were able to participate in reading, math, STEM, writing, and PE centered around a Minecraft theme. This allowed students to begin their adjustment to regular in-person learning in a less formal setting. Should the legislature decide to fund more summer program grants in the future, Eagle will consider offering more summer enrichment programs.

In addition to the anticipated challenges of returning to full-time, in-person learning after over a year in distance and hybrid settings, the continuation of the COVID-19 pandemic brings new challenges. In order to keep students as safe as possible in their learning environment, Eagle has strict health guidelines. Students who experience several COVID-19 symptoms and are waiting on test results as well as students who have been exposed to the virus and need to quarantine may participate in distance learning. In order to facilitate this, Eagle hired a part-time [distance learning](#) teacher who coordinates with all six grade levels and offers students distance learning support at home whenever it is necessary. This option has allowed students to continue staying connected to their school and progress in their learning even when on a lengthy quarantine. ODE’s new

“Test to Stay” protocol and the ability for children 5 and older to receive the vaccine may help stabilize some of the need for quarantine, isolation, and distance learning.

Like all schools across the country, Eagle Charter is assessing where students are currently performing and creating plans to accelerate learning to close the gap. This must be done gently, while also attending to the social-emotional needs of students who need additional support post-COVID lockdown. We anticipate it will take several years for schools to close all the gaps caused by the pandemic, and it will only be fully successful if education is funded at an adequate rate so that schools can provide all the support that students need.

Financial Performance

Eagle has been able to increase its financial performance as measured by [annual audit data](#). Each year, Eagle has managed its funds so that we are able to expand our personnel and better support students. Although Eagle had to use part of its Rainy Day fund during the 2020-2021 school year when school budgets (including the anticipated SIA funds) were cut, we still have a healthy Rainy Day fund (approximately \$223,000). The large needs created by the current pandemic have been addressed by budgeting ESSER II and ESSER III funds. When those funds are gone (anticipated at the end of the 2022-2023 school year), if the federal or state government does not provide additional money to support the learning and growth needs of students, Eagle will use additional Rainy Day funds to meet the need for another year and then can slowly reduce spending and staffing levels to within an ADM and SIA-only budget. If Eagle is allowed to raise its enrollment cap to at least 168 (an additional class of 24 students) then Eagle could continue operating at present staffing and support levels through the foreseeable future without reliance on rainy day funds.

Organizational Performance

Eagle has created more organized operations that allow for better organizational performance. The front office adopted Standard Operating Procedures (SOPs) for many of the routine tasks so that it is easier to teach new personnel or substitutes. The technology support implemented during the pandemic included the adoption of a Student Management System (SMS), QuickSchools, that streamlined attendance, grades, and grade reports, as well as the application and registration process. SIA funds allowed Eagle to increase their special education teacher to full-time, thus allowing the school to adopt an RTI model to address learning needs. The SIA funds also supported increased school counselor FTE and the school counselor was able to streamline the SST process used to help students receive the interventions and supports they need even faster than in the past. Eagle is building a reputation among families that it is a school that can help students who struggle in larger, more traditional public school settings.

Eagle Charter School had a [robust response](#) to the COVID-19 pandemic shut down because of its improved organizational performance. In March 2020, the world shut down in response to the rapid spread of COVID-19. Late on March 12, Gov. Brown announced that Oregon schools would be closed through the end of the month. Eagle staff quickly helped students prepare on March 13 to be away from school for two weeks, a week longer than the pre-planned spring break at the end of the month. When the lockdown was extended – first to a month, then to the end of the school year, and then again at the start of the following year – Eagle staff quickly and expertly addressed each new development.

COVID-19 Situation & Need	Examples of Eagle ³⁸² Charter School’s Response (non-exhaustive list)
---------------------------	----------------------------------------------------------------------------------

<p>Centering on Care & Connection</p>	<ul style="list-style-type: none"> ● Monthly house visits through June 2020 to every student ● Monthly packet pick up/drop off/celebration events throughout 2020-2021 ● Monthly PBIS “Green Zone Parties” to encourage attendance and participation ● Care for staff: daily check-in meetings, virtual staff events, paid time off for vaccination and booster when available ● Parent Club offered virtual events and play dates ● Fire and Ice Storm responses ● Counseling support for adult caregivers <p>School-Home Connection</p> <ul style="list-style-type: none"> ● Began 2020 and 2021 with one-on-one meetings with every family and student ● Weekly notes home (Dojo, Facebook, email) ● 100% of families connected on ClassDojo ● Notes to all students every month from the principal during the 2020-2021 school year ● Parenting Corner & Parenting Classes ● Family surveys ● Flexible options for conferences
<p>Culture of Learning, Centered on Trauma-Informed Practices</p>	<ul style="list-style-type: none"> ● Robust distance learning schedule ● Implemented CDL at least two weeks earlier than most districts (3/31/20) ● Shift to 4-day weeks for the 2020-2021 school year ● Focus on equity in the shift to hybrid learning (retained CDL schedule and added in-person instruction in the afternoons) ● Literacy month: staff and board members read a different book each day of the month (Nov. 2020) from a distance ● Regular review of PBIS data ● Staff trained in trauma support, ACEs ● Consistent schoolwide expectations based on Love & Logic principles
<p>Financial Practices or Decisions to Promote Learning</p>	<ul style="list-style-type: none"> ● Technology support (WiFi access points, etc.) for families ● Part-time tutoring in Spring 2021 to support families who struggled with technology ● Summer Enrichment Program ● MOU with Salem-Keizer School District to provide full-time LRC teacher at Eagle ● Adoption of QuickSchools as a new SMS
<p>Community Partnerships</p>	<ul style="list-style-type: none"> ● Guest speakers from around the world on Zoom ● Implemented weekly Spanish elective for all students during CDL ● Implemented weekly ASL classes for grades 3-5 and Eagle staff in the 2021-2022 school year ● Local food banks (during CDL, Eagle had 90% economically disadvantaged families and staff used their weekly day off to

	<ul style="list-style-type: none"> ● deliver food boxes to over 25% of the student body) ● Local faith-based organizations (to provide holiday food and gift boxes) ● Public library (virtual events) ● OSD cafeteria (partnership for summer enrichment program lunches)
Culturally Relevant Practices	<ul style="list-style-type: none"> ● Learning experiences with Oregon Jewish Museum and Center for Holocaust Education, and Grand Ronde ● Use of a wide variety of diverse books so that students see themselves in the curriculum ● Individualized supports that emphasize a Love & Logic approach and restorative justice practices instead of punitive disciplinary measures
Assessment Tools	<ul style="list-style-type: none"> ● Each child is assessed and monitored so that they receive the exact instruction they need to be academically successful; we do not rely on one assessment measure alone ● easyCBM ● iReady ● DRA ● Comprehension Checks ● In-house designed kindergarten assessments ● ELPA 21 screener ● Dyslexia screener

III. Looking Forward: Plans for the Next Charter Term

Eagle Charter School would like to expand its offerings to reach more students who need an alternative to the large, traditional elementary school model in the local area. The school has stable board leadership, school leadership, and staff and has been able to maintain that through the pandemic. Families have expressed interest in having Eagle expand either through 8th grade or increase the number of K-5 classrooms. In order to do this, Eagle needs an increase to their cap on enrollment.

Educational Program

The MicroSociety Program is well-suited to middle school grades. In fact, the majority of MicroSociety schools around the country are either middle or high school level. Eagle parents overwhelmingly support the expansion of Eagle’s program into the middle school grades; there are currently few public, non-traditional middle school options for students in the greater Salem area. Eagle would like to expand its student enrollment to include students up through grade 8; middle school students could have even greater autonomy and connection with the local community, thus increasing their knowledge and understanding of the “real world.” If, however, Eagle is not given permission to expand its student enrollment, it will remain a K-5 and will continue using the technology skills gained during the pandemic to help students connect with more members of the community and apply what they learn in MicroSociety to interactions in the “real world.”

Financial Plans

The projections provided here are based on two assumptions:

1. The state will keep its current school funding levels and the federal government will not provide additional COVID relief.
2. Eagle will use all of the ESSER funds (current COVID relief) by the end of the 2022-2023 school year and will rely only on ADM and SIA grant funding.

There are two different budget projections:

1. Eagle keeps its current enrollment cap at 144 students for the full five-year charter renewal.
2. Eagle increases its enrollment cap to at least 168 (one additional class of 24).

While Eagle would like to expand by 72 additional students over the course of five years, due to building and logistical restrictions that have not been fully solved at the writing of this document, that expansion was not given a budget projection.

Both budgets show that Eagle can remain solvent. However, the more austere budget is not ideal. It relies on eventual staff cuts, pay freezes, and other cost-saving measures. Both budgets were calculated very conservatively and we expect Eagle to be in a better position than the budgets portray. Nevertheless, without knowing the future and how the legislature will fund education after this biennium, the budgets were designed to anticipate the worst case scenario.

[Budget Proposal #1: Austerity](#)

This assumes Eagle stays at its current enrollment cap, that the ADM funding per pupil remains what it was in June 2021, SIA funds do not increase, and there are no more COVID relief funds. With this scenario, Eagle uses some of its rainy day funds in the 2022-2023 school year to keep present staffing levels. After that, Eagle's staff is reduced to classroom teachers, a PE teacher, one office staff, one instructional aide, a counselor and an administrator. Staff pay rates are frozen. Technology is scaled back to divert more funds into the necessary consumable supplies to keep the school operational. It is far from ideal, but it is a functional school operating within a budget that can be sustained over time.

[Budget Proposal #2: Expansion](#)

This proposal assumes Eagle expands by 24 students (one class size). To do that, Eagle would need to hire an additional classroom teacher, provide for additional supplies and technology, and keep the remainder of the current staffing levels. This allows Eagle to operate without using rainy day funds and to provide a valuable alternative to families looking for something other than a large, traditional elementary school. In order for schools to be sustainable in the long-run without drastic measures, the student body needs to be close to 200 students. The expansion of Eagle's student body to at least 168 students creates better stability and sustainability.

[Organizational Plans](#)

Eagle's school leadership or staffing model after the first year of the new charter contract will depend on school funding. Currently, Eagle operates a school with one administrator, 2.5 office staff, one part-time counselor, 11 teachers (ranging from several hours a week to full-time), and three instructional aides (part- and full-time). This amount of staffing allows Eagle to operate more efficiently and effectively than it has in the past, support the increased needs of students in the COVID-era, and develop a reputation as a school where students with

special needs can thrive. Eagle has been able to attract staff, particularly licensed staff, by offering salaries that are similar to local school districts and thus more competitive than many charter schools. All of our teaching staff hold regular teaching licenses through TSPC and are highly qualified to work with students. Without the additional funds provided for COVID relief, this level of staffing is unsustainable. The Oregon Legislature does not adequately fund education and charter schools receive even less ADM than traditional public schools. In order for Eagle to provide a high quality instructional setting, it must be able to attract and retain highly qualified teachers who are adept at working with students with trauma or special needs. When our ESSER dollars are gone (currently anticipated at the end of the 2022-2023 school year) if there is not another significant source of school funding, Eagle will have to scale back, which would include cutting technology, reducing the curriculum and supplies budget, cutting staff positions, freezing or cutting staff salaries, and potentially cutting the administrator salary and FTE to reach a balanced budget. That would reverse the progress and forward momentum Eagle has had in the past three years. It would not be in the best interest of students or the Eagle community as a whole. It is imperative that schools receive a substantial increase in the amount of state funding on a regular basis so that students receive the support they need. This issue is not specific to Eagle; the Oregon legislature has under-funded education for several decades and, in combination with the pandemic stress and shortages, will create a significant educational crisis if they do not remedy this.

If, however, the state school funding increases or Eagle is allowed to expand to at least 168 students, there is much more hope. Eagle parents are overwhelmingly in favor of expanding the school to a K-8 (which would be an enrollment of 216 students) by the end of the next five-year charter contract. Whether or not this can happen is based on a charter renewal, a charter contract that allows for an increase, and an ability to find at least 3 additional classrooms on campus to house the additional students.

Eagle plans to remain at the Oregon School of the Deaf for the foreseeable future. We have a good working relationship with our OSD partners and they are good landlords. We would like to work together toward an agreement to expand our school size but that would involve more classroom space and the ability to feed more students in the cafeteria. Ideally, it would include an expansion of up to three classrooms, requiring additional space from OSD (Eagle could currently restructure and has space within its leased space for one more classroom). If that is not possible, Eagle would need to figure out a way to be sustainable with the current cap of 144 students, which would involve the reductions mentioned above in the 2023-2024 school year.

**State Board of Education
Public Charter School Performance Framework
And Annual Evaluation Report**

**Eagle Charter School
2021-22**



**OREGON
DEPARTMENT OF
EDUCATION**

Oregon achieves . . . together!

**Oregon Department of Education
255 Capitol St NE
Salem, OR 97310**

**Prepared by Kristen Miles
Oregon School Boards Association**

Introduction

Across Oregon, public charter schools provide additional options for students and families. The State Board of Education is a public charter school authorizer, or “sponsor” in the state as an appellate governing body. If an application to establish a public charter school is denied by a local school district, the charter school developers may appeal the district decision to the State Board of Education. If the application is deemed to meet the criteria, it is possible for the charter school to be authorized by the State Board of Education. While the state provides oversight and support to its sponsored charters, each charter school has autonomy over its budget, hiring, and the development and implementation of its educational program.

The State Board of Education is responsible for maintaining high standards for its sponsored charter schools, and for ensuring that charter schools are not only compliant with all applicable laws, but that their academic programs are successful, they are financially viable, and their organizations are effective and responsibly managed. The State Board of Education is particularly interested in analyzing equity issues within public charter schools and may continue to refine the tools with which it uses to evaluate a public charter school’s effectiveness and quality.

In so doing, the State Board of Education has established the following performance framework, which is largely derived from the Core Performance Framework and Guidance developed by the National Association of Charter School Authorizers (NACSA). This performance framework is designed to measure each charter school’s academic, financial, and organizational performance, and to “...guide practice, assess progress, and inform decision-making over the course of the charter term and at renewal”.¹

Because each charter school’s story and perspective on its own performance are critical to a balanced evaluation process, each measure includes space for narrative explanation and/or further description from both the State Board and the charter school. It is our hope and goal that each charter school will fully engage in the process of program evaluation each year and at the renewal period, and that this process contributes to the continuous improvement of each State Board of Education public charter school.



Kate Pattison
Program Analyst
Oregon Department of Education

¹ From NACSA’s Core Performance Framework and Guidance.

Academic performance: data elements and sources

The purpose of the Academic Performance section of the Annual Report is to evaluate whether or not the charter school's educational program is showing success with its students.

Many of the indicators for this section are adopted from the National Association of Charter School Authorizers' "Core Performance Framework and Guidance", while the performance targets and ratings are aligned with the targets and ratings in the Oregon Report Card.

The following data elements and sources are used to complete the Academic Performance analysis:

- The charter school's Oregon Report Card
- The charter school's contract
- The charter school's whole school growth and performance on standardized tests in ELA and Math
- The charter school's subgroup growth and performance on standardized tests in ELA and Math
- The district's Oregon Report Card (for the district in which the charter school is located)
- Performance and growth information for comparison schools, as defined by the Oregon Department of Education
- The school's graduation rate (where applicable)
- The district's graduation rate (where applicable)
- The school's completion rate (where applicable)
- The district's completion rate (where applicable)
- The school's dropout rate (where applicable)
- The district's dropout rate (where applicable)
- The graduation, completion, and dropout rates of comparison schools, as defined by ODE (where applicable)
- The charter school's alignment to Common Core State Standards as evidenced by course syllabi, course descriptions, curriculum alignments, etc. (where applicable)

Academic Performance

1. Oregon School Rating System

Measure 1a Is the school meeting acceptable standards according to the Oregon State school rating system?
Exceeds standard: <input type="checkbox"/> School received the highest rating from the state accountability system.
Meets standard: <input type="checkbox"/> School received the highest rating from the state accountability system.
Does not meet standard: <input type="checkbox"/> School did not receive passing rating from the state accountability system.
Falls far below standard: <input type="checkbox"/> School identified for intervention or considered failing by the state accountability system.
State Board of Education comments: N/A. The rating system has not yet been implemented.
School comments:

Measure 1b Is the school meeting state designation expectations as set forth by the state and federal accountability system?
Exceeds standard: <input type="checkbox"/> School was identified as a "Model" school.
Meets standard: <input type="checkbox"/> School does not have a designation.
Does not meet standard: <input type="checkbox"/> School was identified as a "Focus" school.
Falls far below standard: <input type="checkbox"/> School was identified as a "Priority" school.
State Board of Education comments: N/A.
School comments:

Measure 1c

How are **Economically Disadvantaged** students achieving on state assessments in ELA compared to the **Economically Disadvantaged** students in like-schools?

Exceeds standard:

School's average subgroup achievement rate exceeds the average like-schools performance of students in the same subgroup in the same grades by at least 10%.

Meets standard:

School's average subgroup achievement rate meets or exceeds the average like-schools performance of students in the same subgroup in the same grades by up to 10%.

Does not meet standard:

School's average subgroup achievement rate is less than the average like-schools performance of students in the same subgroup in the same grades by 1-10%.

Falls far below standard:

School's average subgroup achievement rate is less than the average like-schools performance of students in the same subgroup in the same grades by 10% or more.

State Board of Education comments: NA for the 2019-20 and 2020-21 school years

School comments:

Measure 1d

How are **Economically Disadvantaged** students achieving on state assessments in MATH compared to the **Economically Disadvantaged** students in like-schools?

Exceeds standard:

School's average subgroup achievement rate exceeds the average like-schools performance of students in the same subgroup in the same grades by at least 10%.

Meets standard:

School's average subgroup achievement rate meets or exceeds the average like-schools performance of students in the same subgroup in the same grades by up to 10%.

Does not meet standard:

School's average subgroup achievement rate is less than the average like-schools performance of students in the same subgroup in the same grades by 1-10%.

Falls far below standard:

School's average subgroup achievement rate is less than the average like-schools performance of students in the same subgroup in the same grades by 10% or more.

State Board of Education comments: NA for the 2019-20 and 2020-21 school years

School comments:

<p>Measure 1e How are English Learners achieving on state assessments in ELA compared to the English Learners in like-schools?</p>
<p>Exceeds standard: <input type="checkbox"/> School's average subgroup achievement rate exceeds the average district performance of students in the same subgroup in the same grades by at least 10%.</p>
<p>Meets standard: <input type="checkbox"/> School's average subgroup achievement rate meets or exceeds the average district performance of students in the same subgroup in the same grades by up to 10%.</p>
<p>Does not meet standard: <input type="checkbox"/> School's average subgroup achievement rate is less than the average district performance of students in the same subgroup in the same grades by 1-10%.</p>
<p>Falls far below standard: <input type="checkbox"/> School's average subgroup achievement rate is less than the average district performance of students in the same subgroup in the same grades by 10% or more.</p>
<p>State Board of Education comments: NA for the 2019-20 and 2020-21 school years</p>
<p>School comments:</p>

<p>Measure 1f How are English Learners achieving on state assessments in MATH compared to the English Learners in like-schools?</p>
<p>Exceeds standard: <input type="checkbox"/> School's average subgroup achievement rate exceeds the average district performance of students in the same subgroup in the same grades by at least 10%.</p>
<p>Meets standard: <input type="checkbox"/> School's average subgroup achievement rate meets or exceeds the average district performance of students in the same subgroup in the same grades by up to 10%.</p>
<p>Does not meet standard: <input type="checkbox"/> School's average subgroup achievement rate is less than the average district performance of students in the same subgroup in the same grades by 1-10%.</p>
<p>Falls far below standard: <input type="checkbox"/> School's average subgroup achievement rate is less than the average district performance of students in the same subgroup in the same grades by 10% or more.</p>
<p>State Board of Education comments: NA for the 2019-20 and 2020-21 school years</p>
<p>School comments:</p>

Measure 1g

How are **Students with Disabilities** achieving on state assessments in ELA compared to the **Students with Disabilities** in like-schools?

Exceeds standard:

School's average subgroup achievement rate exceeds the average like-schools performance of students in the same subgroup in the same grades by at least 10%.

Meets standard:

School's average subgroup achievement rate meets or exceeds the average like-schools performance of students in the same subgroup in the same grades by up to 10%.

Does not meet standard:

School's average subgroup achievement rate is less than the average like-schools performance of students in the same subgroup in the same grades by 1-10%.

Falls far below standard:

School's average subgroup achievement rate is less than the average like-schools performance of students in the same subgroup in the same grades by 10% or more

State Board of Education comments: NA for the 2019-20 and 2020-21 school years

School comments:

Measure 1h

How are **Students with Disabilities** achieving on state assessments in MATH compared to the **Students with Disabilities** in like-schools?

Exceeds standard:

School's average subgroup achievement rate exceeds the average like-schools performance of students in the same subgroup in the same grades by at least 10%.

Meets standard:

School's average subgroup achievement rate meets or exceeds the average like-schools performance of students in the same subgroup in the same grades by up to 10%.

Does not meet standard:

School's average subgroup achievement rate is less than the average like-schools performance of students in the same subgroup in the same grades by 1-10%.

Falls far below standard:

School's average subgroup achievement rate is less than the average like-schools performance of students in the same subgroup in the same grades by 10% or more.

State Board of Education comments: NA for the 2019-20 and 2020-21 school years

School comments:

Measure 1i

How are **Students of Underserved Races/Ethnicities** achieving on state assessments in ELA compared to the **Students of Underserved Races/Ethnicities** in like-schools?

Exceeds standard:

School's average subgroup achievement rate exceeds the average like-schools performance of students in the same subgroup in the same grades by at least 10%.

Meets standard:

School's average subgroup achievement rate meets or exceeds the average like-schools performance of students in the same subgroup in the same grades by up to 10%.

Does not meet standard:

School's average subgroup achievement rate is less than the average like-schools performance of students in the same subgroup in the same grades by 1-10%.

Falls far below standard:

School's average subgroup achievement rate is less than the average like-schools performance of students in the same subgroup in the same grades by 10% or more.

State Board of Education comments: NA for the 2019-20 and 2020-21 school years

School comments:

Measure 1j

How are **Students of Underserved Races/Ethnicities** achieving on state assessments in MATH compared to the **Students of Underserved Races/Ethnicities** in like-schools?

Exceeds standard:

School's average subgroup achievement rate exceeds the average like-schools performance of students in the same subgroup in the same grades by at least 10%.

Meets standard:

School's average subgroup achievement rate meets or exceeds the average like-schools performance of students in the same subgroup in the same grades by up to 10%.

Does not meet standard:

School's average subgroup achievement rate is less than the average like-schools performance of students in the same subgroup in the same grades by 1-10%.

Falls far below standard:

School's average subgroup achievement rate is less than the average like-schools performance of students in the same subgroup in the same grades by 10% or more.

State Board of Education comments: NA for the 2019-20 and 2020-21 school years

School comments:

2. Student Academic Growth

Measure 2a Are All students making expected annual academic growth in ELA compared to their peers? (Combined Median Growth Percentile-CMGP 3-year average)
Exceeds standard: <input type="checkbox"/> Combined median growth percentile of 60 or more.
Meets standard: <input type="checkbox"/> Combined median growth percentile of between 35 and 59.5.
Does not meet standard: <input type="checkbox"/> Combined median growth percentile of between 30 and 34.5.
Falls far below standard: <input type="checkbox"/> Combined median growth percentile of lower than 30.
State Board of Education comments: NA for the 2019-20 and 2020-21 school years
School comments:

Measure 2b Are students making expected annual academic growth in MATH compared to their peers? (Combined Median Growth Percentile 3-year average)
Exceeds standard: <input type="checkbox"/> Combined median growth percentile of 60 or more.
Meets standard: <input type="checkbox"/> Combined median growth percentile of between 35 and 59.5.
Does not meet standard: <input type="checkbox"/> Combined median growth percentile of between 30 and 34.5.
Falls far below standard: <input type="checkbox"/> Combined median growth percentile of lower than 30.
State Board of Education comments: NA for the 2019-20 and 2020-21 school years
School comments:

3. Subgroup Growth

Measure 3a Is the school increasing academic performance in ELA over time for Economically Disadvantaged students? (Combined Median Growth Percentile 3-year average)
Exceeds standard: <input type="checkbox"/> Combined median growth percentile of 60 or more.
Meets standard: <input type="checkbox"/> Combined median growth percentile of between 35 and 59.5.
Does not meet standard: <input type="checkbox"/> Combined median growth percentile of between 30 and 34.5.
Falls far below standard: <input type="checkbox"/> Combined median growth percentile of lower than 30.
State Board of Education comments: NA for the 2019-20 and 2020-21 school years
School comments:

Measure 3b Is the school increasing academic performance in MATH over time for Economically Disadvantaged students? (Combined Median Growth Percentile 3-year average)
Exceeds standard: <input type="checkbox"/> Combined median growth percentile of 60 or more.
Meets standard: <input type="checkbox"/> Combined median growth percentile of between 35 and 59.5.
Does not meet standard: <input type="checkbox"/> Combined median growth percentile of between 30 and 34.5.
Falls far below standard: <input type="checkbox"/> Combined median growth percentile of lower than 30.
State Board of Education comments: NA for the 2019-20 and 2020-21 school years
School comments:

Measure 3c Is the school increasing academic performance in ELA over time for English Learner students? (Combined Median Growth Percentile 3-year average)
Exceeds standard: <input type="checkbox"/> Combined median growth percentile of 60 or more.
Meets standard: <input type="checkbox"/> Combined median growth percentile of between 35 and 59.5.

<p>Does not meet standard:</p> <input type="checkbox"/> Combined median growth percentile of between 30 and 34.5.
<p>Falls far below standard:</p> <input type="checkbox"/> Combined median growth percentile of lower than 30.
<p>State Board of Education comments: NA for the 2019-20 and 2020-21 school years</p>
<p>School comments:</p>

<p>Measure 3d</p> <p>Is the school increasing academic performance in MATH over time for English Learner students? (Combined median Growth Percentile 3-year average)</p>
<p>Exceeds standard:</p> <input type="checkbox"/> Combined median growth percentile of 60 or more.
<p>Meets standard:</p> <input type="checkbox"/> Combined median growth percentile of between 35 and 59.5.
<p>Does not meet standard:</p> <input type="checkbox"/> Combined median growth percentile of between 30 and 34.5.
<p>Falls far below standard:</p> <input type="checkbox"/> Combined median growth percentile of lower than 30.
<p>State Board of Education comments: NA for the 2019-20 and 2020-21 school years</p>
<p>School comments:</p>

<p>Measure 3e Is the school increasing academic performance in ELA over time for Students with Disabilities? (Combined Median Growth Percentile 3-year average)</p>
<p>Exceeds standard: <input type="checkbox"/> Combined median growth percentile of 60 or more.</p>
<p>Meets standard: <input type="checkbox"/> Combined median growth percentile of between 35 and 59.5.</p>
<p>Does not meet standard: <input type="checkbox"/> Combined median growth percentile of between 30 and 34.5.</p>
<p>Falls far below standard: <input type="checkbox"/> Combined median growth percentile of lower than 30.</p>
<p>State Board of Education comments: NA for the 2019-20 and 2020-21 school years</p>
<p>School comments:</p>

<p>Measure 3f Is the school increasing academic performance in MATH over time for Students with Disabilities? (Combined Median Growth Percentile 3-year average)</p>
<p>Exceeds standard: <input type="checkbox"/> Combined median growth percentile of 60 or more.</p>
<p>Meets standard: <input type="checkbox"/> Combined median growth percentile of between 35 and 59.5.</p>
<p>Does not meet standard: <input type="checkbox"/> Combined median growth percentile of between 30 and 34.5.</p>
<p>Falls far below standard: <input type="checkbox"/> Combined median growth percentile of lower than 30.</p>
<p>State Board of Education comments: NA for the 2019-20 and 2020-21 school years</p>
<p>School comments:</p>

Measure 3g

Is the school increasing academic performance in ELA over time for students of **Underserved Races/Ethnicities**? (Combined Median Growth Percentile 3-year average)

Exceeds standard:

Combined median growth percentile of 60 or more.

Meets standard:

Combined median growth percentile of between 35 and 59.5.

Does not meet standard:

Combined median growth percentile of between 30 and 34.5.

Falls far below standard:

Combined median growth percentile of lower than 30.

State Board of Education comments: NA for the 2019-20 and 2020-21 school years

School comments:

Measure 3h

Is the school increasing academic performance in MATH over time for students of **Underserved Races/Ethnicities**? (Combined Median Growth Percentile 3-year average)

Exceeds standard:

Combined median growth percentile of 60 or more.

Meets standard:

Combined median growth percentile of between 35 and 59.5.

Does not meet standard:

Combined median growth percentile of between 30 and 34.5.

Falls far below standard:

Combined median growth percentile of lower than 30.

State Board of Education comments: NA for the 2019-20 and 2020-21 school years

School comments:

4. Alignment of Curriculum to Common Core State Standards

Measure 4a Is the school aligning curriculum to Common Core State Standards?
Meets standard: <input checked="" type="checkbox"/> School is offering all required core subjects and has aligned all classes in core subjects to Common Core State Standards and has articulated this through detailed syllabi, course descriptions, curriculum alignments, or other methods.
Does not meet standard: <input type="checkbox"/> School is offering all required core subjects but has not fully aligned all classes in core subjects to Common Core State Standards, and/or has not provided evidence of this through detailed syllabi, course descriptions, curriculum alignments, or other methods.
Falls far below standard: <input type="checkbox"/> School is not offering all required core subjects and/or has not aligned all classes in core subjects to Common Core State Standards, and has not provided evidence of this through detailed syllabi, course descriptions, curriculum alignments, or other methods.
State Board of Education comments:
School comments:

5. Graduation and post-secondary readiness (high schools only)

Measure 5a What percentage of students is graduating within four years of entering high school as compared to other schools in like-schools?
Exceeds standard: <input type="checkbox"/> School's average graduation rate exceeds the average district graduation rate by at least 10%.
Meets standard: <input type="checkbox"/> School's average graduation rate meets or exceeds the average district graduation rate by up to 10%.
Does not meet standard: <input type="checkbox"/> School's average graduation rate is less than the average district graduation rate by 1-10%.
Falls far below standard: <input type="checkbox"/> School's average graduation rate is less than the average district graduation rate by 10% or more.
State Board of Education comments: N/A
School comments:

Measure 5b

What percentage of students is graduating within four years of entering high school as compared to their peers in like schools?

Exceeds standard:

School's average graduation rate exceeds the average graduation rate of their peers in like schools by at least 10%.

Meets standard:

School's average graduation rate meets or exceeds the average graduation rate of their peers in like schools by up to 10%.

Does not meet standard:

School's average graduation rate is less than the average graduation rate of their peers in like schools by 1-10%.

Falls far below standard:

School's average graduation rate is less than the average graduation rate of their peers in like schools by 10% or more.

State Board of Education comments: N/A

School comments:

Measure 5c

What percentages of students receive a regular, modified, extended, or adult high school diploma or complete a GED within five years of entering high school as compared to other schools in like-schools?

Exceeds standard:

School's average completion rate exceeds the average district completion rate by at least 10%.

Meets standard:

School's average completion rate meets or exceeds the average district completion rate by up to 10%.

Does not meet standard:

School's average completion rate is less than the average district completion rate by 1-10%.

Falls far below standard:

School's average completion rate is less than the average district completion rate by 10% or more.

State Board of Education comments: N/A

School comments:

Measure 5d

What percentages of students receive a regular, modified, extended, or adult high school diploma or complete a GED within five years of entering high school as compared to their peers in like schools?

Exceeds standard:

School's average completion rate exceeds the average completion rate of their peers in like schools by at least 10%.

Meets standard:

School's average completion rate meets or exceeds the average completion rate of their peers in like schools by up to 10%.

Does not meet standard:

School's average completion rate is less than the average completion rate of their peers in like schools by 1-10%.

Falls far below standard:

School's average completion rate is less than the average completion rate of their peers in like schools by 10% or more.

State Board of Education comments: N/A

School comments:

Measure 5e

What percentage of students dropped out during the school year and did not re-enroll as compared to other schools in like-schools?

Exceeds standard:

School's average dropout rate is less than the average district dropout rate by 4% or more.

Meets standard:

School's average dropout rate meets or is less than the average district dropout rate by up to 4%.

Does not meet standard:

School's average dropout rate exceeds the average district dropout rate by 1-4%.

Falls far below standard:

School's average dropout rate exceeds the average district dropout rate by 4% or more.

State Board of Education comments: N/A

School comments:

Measure 5f

What percentage of students dropped out during the school year and did not re-enroll as compared to their peers in like schools?

Exceeds standard:

School's average dropout rate is less than the average dropout rate of their peers in like schools by 4% or more.

Meets standard:

School's average dropout rate meets or is less than the average dropout rate of their peers in like schools by up to 4%.

Does not meet standard:

School's average dropout rate exceeds the average dropout rate of their peers in like schools by 1-4%.

Falls far below standard:

School's average dropout rate exceeds the average dropout rate of their peers in like schools by 4% or more.

State Board of Education comments: N/A

School comments:

COMMENDATIONS: ACADEMIC PERFORMANCE

1. The school continues to show evidence of MicroSociety integration and order with a stronger connection to Common Core Standards.
2. While traditional measures of student achievement were not used in this year's framework, the school implemented a comprehensive plan to serve students during CDL. More information on this is available in the renewal recommendation report.

RECOMMENDATIONS: ACADEMIC PERFORMANCE

1. Like all schools, Eagle should work to ensure that any gaps in learning due to the pandemic with equity at the center of this effort.

Financial Performance: data elements and sources

The purpose of the Financial Performance section of the Annual Report is to evaluate whether or not the charter school is financially viable.

Many of the indicators, performance targets, and ratings for this section are adopted from the National Association of Charter School Authorizers' "Core Performance Framework and Guidance".

The following data elements and sources are used to complete the Financial Performance analysis:

- The charter school's contract
- The charter school's audited balance sheet and notes for the last three years
- The charter school's projected enrollment and actual enrollment
- The charter school's board-adopted budget
- The charter school's audited income statement and audited cash flow statement
- Annual principal and interest obligations
- Quarterly financial statements, including budget-to-actuals, profit and loss, balance sheet

Financial Performance

7. Near-Term Measures

Measure 7a Current ratio: Current assets divided by current liabilities
Meets standard: <input checked="" type="checkbox"/> Current ratio is greater than or equal to 1.1.
Does not meet standard: <input type="checkbox"/> Current ratio is between .9 and 1.0 or equals 1.0.
Falls far below standard: <input type="checkbox"/> Current ratio is less than or equal to .9.
State Board of Education comments: As of June 30, 2021, school's current ratio is 8.33
School comments:

Measure 7b Unrestricted days cash: Unrestricted cash divided by ((total expenses minus depreciation expense) / 365)
Meets standard: <input checked="" type="checkbox"/> 60 days cash.
Does not meet standard: <input type="checkbox"/> Days cash is between 15 and 30 days.
Falls far below standard: <input type="checkbox"/> Fewer than 15 days cash.
State Board of Education comments: As of June 30, 2021, the school's unrestricted days of cash is 40 days.
School comments:

Measure 7c Enrollment variance: actual enrollment divided by enrollment projection in charter school board-approved budget
Meets standard: <input type="checkbox"/> Enrollment variance equals or exceeds 95% in the most recent year.
Does not meet standard: <input type="checkbox"/> Enrollment variance is between 85-95% in the most recent year.
Falls far below standard: <input type="checkbox"/> Enrollment variance is less than 85% in the most recent year.
State Board of Education comments: N/A. This was not evaluated during the 2021-22 school year.
School comments: The pandemic caused shifts in enrollment. Nevertheless, Eagle was able to

maintain enrollment above 140 students throughout the 2020-2021 school year, averaging an enrollment of 142. The enrollment cap is set at 144. The return to in-person learning changed some of the typical enrollment numbers. Some families left (moved out of state) because of COVID restrictions; other families joined Eagle because of the safety measures in place, while still others chose to home school or enroll in online education because of concerns over the virus. Eagle averages 136 students in the 2021-2022 school year and the lower enrollment is consistent with what many schools and districts are seeing across the state.

Measure 7d

Default

Meets standard:

School is not in default of loan covenant(s) and/or is not delinquent with debt service payments.

Falls far below standard:

School is in default of loan covenant(s) and/or is delinquent with debt service payments.

State Board of Education comments: As of June 30, 2021, the school has not reported any defaults or delinquent debt.

School comments:

8. Sustainability Measures

Measure 8a

Total Margin: Net income divided by total revenue.
Aggregated total margin: Total 3-year net income divided by total 3-year revenues.

Meets standard:

Aggregated 3-year total margin is positive and the most recent year total margin is positive.

Does not meet standard:

Aggregated 3-year total margin is greater than -1.5%, but trend does not "meet standard" (above).

Falls far below standard:

Aggregated three-year total margin is less than or equal to -1.5% and the most recent year total margin is less than -10%.

State Board of Education comments: Not measured in the 2020-21 school year

School comments:

Measure 8b

Debt to asset ratio: Total liabilities divided by total assets

Meets standard:

Debt-to-asset ratio is less than 0.9.

Does not meet standard:

Debt-to-asset ratio is between 0.9 and 1.0.

Falls far below standard:

Debt-to-asset ratio is greater than 1.0

State Board of Education comments: As of June 30, 2021, the school's debt to asset ratio is 0.11
School comments:

<p>Measure 8c Cash flow: Multi-year cash flow = Year 3 total cash - Year 1 total cash. One-year cash flow: Year 2 total cash - Year 1 total cash.</p>
<p>Meets standard: <input type="checkbox"/> Multi-year cumulative cash flow is positive and cash flow is positive each year.</p>
<p>Does not meet standard: <input type="checkbox"/> Multi-year cumulative cash flow is positive, but trend does not "meet standard" (above).</p>
<p>Falls far below standard: <input checked="" type="checkbox"/> Multi-year cumulative cash flow is negative.</p>
<p>State Board of Education comments: As of June 30, 2021, the school's one-year cumulative cash flow is positive with \$10,797, The Multi-year is negative with -\$178,534.</p>
<p>School comments: Eagle submitted a budget that shows the school is able to maintain its educational program even with limited resources and funding. The budget projections were based on ADM numbers from July 2021, since at the time of the budget projection the school could not predict what increases there might be to ADM or what additional funding might be provided. Through the use of some rainy day funds and conservative spending in 2021-2022 that will allow carryover of ESSER II and ESSER III funds, Eagle will be able to continue its high quality educational programming.</p>

<p>Measure 8d Debt service coverage ratio: (net income + depreciation + interest expense) / (annual principal, interest, and lease payments)</p>
<p>Meets standard: <input type="checkbox"/> Debt service coverage ratio is equal to or exceeds 1.1</p>
<p>Does not meet standard: <input type="checkbox"/> Debt service coverage ratio is less than 1.1</p>
<p>State Board of Education comments: N/A. This was not evaluated during the 2020-21 school year.</p>
<p>School comments:</p>

<p>Measure 8e Is the school meeting financial reporting and compliance requirements?</p>
<p>Meets standard: <input checked="" type="checkbox"/> The school materially complies with applicable laws, rules, regulations, and provisions of the charter contract relating to financial reporting requirements, including, but not limited to:</p> <ul style="list-style-type: none"> • Complete and timely submission of financial reports, including: annual budget, revised budgets (when applicable), quarterly financial reports, and annual municipal audit • All other reporting requirements related to the use of public funds

Does not meet standard:

The school was materially out of compliance with applicable laws, rules, regulations, and/or provisions of the charter contract relating to financial reporting requirements, including, but not limited to:

- Complete and timely submission of financial reports, including: annual budget, revised budgets (when applicable), quarterly financial reports, and annual municipal audit
- All other reporting requirements related to the use of public funds

State Board of Education comments:

School comments:

Measure 8f

Is the school following Generally Accepted Accounting Principles (GAAP)?

Meets standard:

The school materially complies with applicable laws, rules, regulations, and provisions of the charter contract relating to financial management and oversight expectations by an annual independent audit, including, but not limited to:

- An unqualified audit opinion
- An audit devoid of significant findings and conditions, material weaknesses, or significant internal control weaknesses
- An audit that does not include a going concern disclosure in the notes or an explanatory paragraph within the audit report

Does not meet standard:

The school was materially out of compliance with applicable laws, rules, regulations, and/or provisions of the charter contract relating to financial management and oversight expectations by an annual independent audit, including, but not limited to:

- An qualified audit opinion
- An audit containing significant findings or conditions, material weaknesses, or significant internal control weaknesses
- An audit that included a going concern disclosure in the notes or an explanatory paragraph within the audit report

State Board of Education comments: While this meets standard, Eagle was required to submit a plan to address both material weaknesses and significant deficiencies reported in their audit or the year ending June 30, 2020.

Material weaknesses included:

- Segregation of duties
- Transactions reported in the incorrect period

Significant deficiencies included:

- Lack of internal controls over journal entries
- Improper recording of lunch fund transactions
- Preparation of financial statement in accordance with GAAP

School comments: As a small school that has 1.5 FTE in the office, segregation of duties will always be a challenge. However, Eagle has built significant oversight into its processes. The administrator oversees all deposits, purchases, bank statements, and Quickbooks reports, and the Eagle Charter School Board Treasurer reviews all transactions and reports multiple times each month. Bank statements and Quickbooks reports are provided to the entire board on a monthly basis.

The improper recording of a lunch fund transaction was the result of a reimbursement from ODE that arrived over a year late and was entered by a new bookkeeper in the current quarter rather than entered in the quarter in which the invoice was created. That issue and the issue of journal entries were rectified with training in the fall of 2021. Eagle submitted its report on how we addressed our weaknesses to the proper state authorities.

COMMENDATIONS: FINANCIAL PERFORMANCE

1. The school maintains strong debt to asset ratio.
2. The school has sufficient cash on hand.

RECOMMENDATIONS: FINANCIAL PERFORMANCE

1. Eagle should continue to work to maintain its financial stability and address deficiencies and weaknesses in its audits.

Organizational Performance: data elements and sources

The purpose of the Organizational Performance section of the Annual Evaluation is to evaluate whether or not the charter school as an organization is effectively governed and well run.

Many of the indicators, performance targets, and ratings for this section are adopted from the National Association of Charter School Authorizers' "Core Performance Framework and Guidance".

The following data elements and sources are used to complete the Organizational Performance analysis:

- Site visit observations (both formal and informal)
- The charter school's contract
- Required reporting by the charter school, including all deliverables
- The school's adherence to deliverable and reporting due dates
- Feedback from parents, students, charter school staff, and other community stakeholders
- Student accounting reports
- The charter school's internal accountability systems
- Student enrollment forms
- The charter school's adopted board policies
- The charter school's parent/student/staff handbooks
- TSPC
- Assurances by the charter school and governing board that it is compliant with all applicable requirements

Organizational Performance

10. Education Program

Measure 10a

Is the school implementing the material terms of the education program as defined in the current charter contract?

Meets standard:

The school implemented the material terms of the education program in all material aspects and the education program in operation reflects the material terms as defined in the charter contract, or the school has gained approval for a modification to the material terms.

Does not meet standard:

The school failed to implement the material terms of the education program in all material aspects and the education program in operation does not reflect the material terms as defined in the charter contract, or the schools implemented a modification to the material terms without approval and/or a mutually agreeable amendment to the contract.

State Board of Education comments: Eagle Charter School is demonstrating integrity with all elements of the education program as spelled out in its charter. The focus of Eagle Charter School is the MicroSociety Program (MSI). All evidence supports that this educational philosophy is the focal point of the school's curriculum, staffing, budget and schedule.

School comments:

Measure 10b

Is the school complying with applicable education requirements?

Meets standard:

The school materially complies with applicable laws, rules, regulations, and provisions of the charter contract relating to education requirements, including, but not limited to:

- Instructional days and/or minutes requirements
- Graduation and promotion requirements
- Content standards, including Common Core State Standards
- The administration of state assessments
- Implementation of mandated programming as a result of state or federal funding

Does not meet standard:

The school was materially out of compliance with applicable laws, rules, regulations, and/or provisions of the charter contract relating to education requirements, including, but not limited to:

- Instructional days and/or minutes requirements
- Graduation and promotion requirements
- Content standards, including Common Core State Standards
- The administration of state assessments
- Implementation of mandated programming as a result of state or federal funding

State Board of Education comments: Eagle Charter School has complied with all applicable education requirements and is focusing on the alignment of the MicroSociety curriculum with the Common core State Standards.

School comments:

Measure 10c

Is the school protecting the rights of students with disabilities?

Meets standard:

Consistent with the school's status as a school in a district LEA, the school materially complies with applicable laws, rules, regulations, and provisions of the charter contract (including the Individuals with Disabilities Education Act, Section 504 of the Rehabilitation Act of 1973, and the Americans with Disabilities Act) relating to the treatment of students with identified disabilities and those suspected of having a disability, including, but not limited to:

- Equitable access and opportunity to enroll
- Identification and referral
- Appropriate involvement with development and implementation of Individualized Education Plans, and appropriate development of Section 504 plans
- Operational compliance, including appropriate inclusion in the school's academic program, assessments, and extracurricular activities.
- Discipline, including due process protections, manifestation determinations, and behavioral intervention plans
- Access to the school's facility and program to students in a lawful manner and consistent with students' IEPs or 504 plans

Does not meet standard:

Consistent with the school's status as a school in a district LEA, the school was materially out of compliance with one or more applicable laws, rules, regulations, and provisions of the charter contract (including the Individuals with Disabilities Education Act, Section 504 of the Rehabilitation Act of 1973, and the Americans with Disabilities Act) relating to the treatment of students with identified disabilities and those suspected of having a disability, including, but not limited to:

- Equitable access and opportunity to enroll
- Identification and referral
- Appropriate involvement with development and implementation of Individualized Education Plans, and appropriate development of Section 504 plans
- Operational compliance, including appropriate inclusion in the school's academic program, assessments, and extracurricular activities.
- Discipline, including due process protections, manifestation determinations, and behavioral intervention plans
- Access to the school's facility and program to students in a lawful manner and consistent with students' IEPs or 504 plans

State Board of Education comments:

School comments:

Measure 10d

Is the school protecting the rights of English Language Learner students?

Meets standard:

The school materially complies with applicable laws, rules, regulations, and provisions of the charter contract (including Title III of the Elementary and Secondary Education Act, and US Department of Education authorities) relating to requirements of English Language Learners, including, but not limited to:

- Equitable access and opportunity to enroll
- Development and implementation of required plans related to the service of ELL students
- Proper steps for identification of students in need of ELL services
- Appropriate and equitable delivery of services to identified students
- Appropriate accommodations on assessments
- Exiting of students from ELL services
- Ongoing monitoring of exited students

Does not meet standard:

The school failed to comply with one or more applicable laws, rules, regulations, and/or provisions of the charter contract (including Title III of the Elementary and Secondary Education Act, and US Department of Education authorities) relating to requirements of English Language Learners, including, but not limited to:

- Equitable access and opportunity to enroll
- Development and implementation of required plans related to the service of ELL students
- Proper steps for identification of students in need of ELL services
- Appropriate and equitable delivery of services to identified students
- Appropriate accommodations on assessments
- Exiting of students from ELL services
- Ongoing monitoring of exited students

State Board of Education comments:

School comments:

11. Governance and Reporting

Measure 11a

Is the school complying with applicable governance requirements?

Meets standard:

The school materially complies with applicable laws, rules, regulations, and provisions of the charter contract relating to governance by its board, including, but not limited to:

- Board policies
- Board bylaws
- State open meetings law
- Code of ethics
- Conflicts of interest
- Board composition and/or membership rules

Does not meet standard:

The school was materially out of compliance with applicable laws, rules, regulations, and/or provisions of the charter contract relating to governance by its board, including, but not limited to:

- Board policies
- Board bylaws
- State open meetings law
- Code of ethics
- Conflicts of interest
- Board composition and/or membership rules

State Board of Education comments: Eagle Charter School's Board membership represents a wide range of expertise. (Accounting, legal, education, facilities etc.) Eagle is in the process of updating its policies and should adopt them as soon as is practicable.

School comments: The new policies were completed and adopted by the board on November 18, 2021. The website has since been updated to reflect the official adoption of these policies. Eagle entered into a contract with OSBA to maintain policies.

Measure 11b

Is the school holding its administration accountable?

Meets standard:

The school materially complies with applicable laws, rules, regulations, provisions of the charter contract, and its own internal policies and practices relating to oversight of school administration, including, but not limited to:

- Board oversight of school administration that includes holding it accountable for performance expectations which may or may not be agreed to under a written performance agreement
- The board conducting an annual evaluation of the administrator's performance

Does not meet standard:

The school was materially out of compliance with applicable laws, rules, regulations, provisions of the charter contract, and its own internal policies and practices relating to oversight of school administration, including, but not limited to:

- Board oversight of school administration that includes holding it accountable for performance expectations which may or may not be agreed to under a written performance agreement
- The board conducting an annual evaluation of the administrator's performance

State Board of Education comments:

School comments:

Measure 11c

Is the school complying with reporting requirements?

Meets standard:

The school materially complies with applicable laws, rules, regulations, and provisions of the charter contract relating to relevant reporting requirements to the district, and the Oregon Department of Education, including, but not limited to:

- Accountability planning and performance
- Attendance and enrollment reporting
- Compliance with the charter contract and all applicable laws
- Timely submission of all deliverables
- Additional information as requested by the district

Does not meet standard:

The school was materially out of compliance with applicable laws, rules, regulations, and/or provisions of the charter contract relating to relevant reporting requirements to the district, and the Oregon Department of Education, including, but not limited to:

- Accountability planning and performance
- Attendance and enrollment reporting
- Compliance with the charter contract and all applicable laws
- Timely submission of all deliverables
- Additional information as requested by the district

State Board of Education comments: Eagle has complied with reporting requirements

School comments:

12. Students and Employees

Measure 12a

Is the school protecting the rights of all students?

Meets standard:

The school materially complies with applicable laws, rules, regulations, and provisions of the charter contract relating to the rights of students, including, but not limited to:

- Policies and practices related to admissions, lottery, waiting lists, fair and open recruitment, and enrollment (including rights to enroll or maintain enrollment)
- The collection and protection of student information
- Due process protections, privacy, civil rights, and student liberties requirements, including First Amendment protections and the Establishment Clause restrictions prohibiting public schools from engaging in religious instruction
- Conduct of discipline (discipline hearings, and suspensions and expulsion policies and practices)

Does not meet standard:

The school was materially out of compliance with applicable laws, rules, regulations, and/or provisions of the charter contract relating to the rights of students, including, but not limited to:

- Policies and practices related to admissions, lottery, waiting lists, fair and open recruitment, and enrollment (including rights to enroll or maintain enrollment)
- The collection and protection of student information
- Due process protections, privacy, civil rights, and student liberties requirements, including First Amendment protections and the Establishment Clause restrictions prohibiting public schools from engaging in religious instruction
- Conduct of discipline (discipline hearings, and suspensions and expulsion policies and practices)

State Board of Education comments: Eagle Charter School complies with protecting the rights of all students as evidenced by board policy, family handbook, staff handbook, professional development, enrollment process and education program.

School comments:

Measure 12b

Is the school meeting teacher and other staff credentialing requirements?

Meets standard:

The school materially complies with applicable laws, rules, regulations, and provisions of the charter contract relating to state certification requirements, including the federal Highly Qualified Teacher and Paraprofessional requirements, charter school licensure and registry requirements, and background check and fingerprinting requirements for all staff and volunteers.

Does not meet standard:

The school was materially out of compliance with applicable laws, rules, regulations, and provisions of the charter contract relating to state certification requirements, including the federal Highly Qualified Teacher and Paraprofessional requirements, charter school licensure and registry requirements, and/or background check and fingerprinting requirements for all staff and volunteers.

State Board of Education comments: Eagle Charter School complies with all applicable laws, rules, regulations and provisions related to staff certification requirements.

School comments:

13. School Environment

Measure 13a Is the school complying with facilities and transportation requirements?
<p>Meets standard:</p> <p><input checked="" type="checkbox"/> The school materially complies with applicable laws, rules, regulations, and provisions of the charter contract relating to the school facilities, grounds, and transportation, including, but not limited to:</p> <ul style="list-style-type: none"> ● Americans with Disabilities Act ● Fire inspections and related records ● Viable certificate of occupancy or other required building use authorization ● Documentation of requisite insurance coverage ● Student transportation
<p>Does not meet standard:</p> <p><input type="checkbox"/> The school was materially out of compliance with applicable laws, rules, regulations, and provisions of the charter contract relating to the school facilities, grounds, and transportation, including, but not limited to:</p> <ul style="list-style-type: none"> ● Americans with Disabilities Act ● Fire inspections and related records ● Viable certificate of occupancy or other required building use authorization ● Documentation of requisite insurance coverage ● Student transportation
<p>State Board of Education comments: Eagle Charter School has current occupancy and insurance certification. Eagle Charter School has an excellent working relationship with Oregon School for The Deaf.</p>
<p>School comments:</p>

Measure 13b Is the school complying with health and safety requirements?
<p>Meets standard:</p> <p><input checked="" type="checkbox"/> The school materially complies with applicable laws, rules, regulations, and provisions of the charter contract relating to safety and the provision of health-related services, including, but not limited to:</p> <ul style="list-style-type: none"> ● Appropriate nursing services and dispensing of pharmaceuticals ● Food service requirements
<p>Does not meet standard:</p> <p><input type="checkbox"/> The school was materially out of compliance with applicable laws, rules, regulations, and provisions of the charter contract relating to safety and the provision of health-related services,, including, but not limited to:</p> <ul style="list-style-type: none"> ● Appropriate nursing services and dispensing of pharmaceuticals ● Food service requirements
<p>State Board of Education comments: Eagle Charter School complies with all health and safety requirements.</p>
<p>School comments:</p>

Measure 13c

Is the school handling information appropriately?

Meets standard:

The school materially complies with applicable laws, rules, regulations, and provisions of the charter contract relating to the handling of information, including, but not limited to:

- Maintaining the security of and providing access to student records under the Family Educational Rights and Privacy Act (FERPA) and other applicable authorities
- Accessing documents maintained by the school under the state's Freedom of Information law and other applicable authorities
- Transferring of student records
- Proper and secure maintenance of testing materials

Does not meet standard:

The school was materially out of compliance with applicable laws, rules, regulations, and provisions of the charter contract relating to the handling of information, including, but not limited to:

- Maintaining the security of and providing access to student records under the Family Educational Rights and Privacy Act (FERPA) and other applicable authorities
- Accessing documents maintained by the school under the state's Freedom of Information law and other applicable authorities
- Transferring of student records
- Proper and secure maintenance of testing materials

State Board of Education comments: Eagle Charter School complies with all laws, rules, regulations and provisions of the charter contract relating to the handling of information.

School comments:

14. Additional Obligations**Measure 14a**

Is the school complying with all other obligations?

Meets standard:

The school materially complies with all other applicable legal, statutory, regulatory, or contractual requirements contained in the charter contract that are not otherwise explicitly stated herein, including, but not limited to requirements from the following sources:

- Revisions to state charter law
- Intervention requirements required by the district
- Action items assigned by the district
- Requirements by other entities to which the charter school is accountable (e.g. ODE)

Does not meet standard:

The school was materially out of compliance with applicable legal, statutory, regulatory, or contractual requirements contained in the charter contract that are not otherwise explicitly stated herein, included, but not limited to requirement from the following sources:

- Revisions to state charter law
- Intervention requirements required by the district
- Action items assigned by the district
- Requirements by other entities to which the charter school is accountable (e.g. ODE)

State Board of Education comments: The school was responsive to additional requests and updates to the law.

School comments:

COMMENDATIONS: ORGANIZATIONAL PERFORMANCE

1. Instructional staff licensure has been consistent.

RECOMMENDATIONS: ORGANIZATIONAL PERFORMANCE

1. Policies should be updated as soon as possible.

SUMMARY OF ANNUAL EVALUATION COMMENDATIONS AND RECOMMENDATIONS

MEASURE	EXCEEDS STANDARD	MEETS STANDARD	DOES NOT MEET STANDARD	FALLS FAR BELOW STANDARD
Oregon rating system				
State and Federal accountability system				
Economically Disadvantaged-ELA				
Economically Disadvantaged-MATH				
ELL-ELA				
ELL-MATH				
Students with Disabilities-ELA				
Students with Disabilities-MATH				
Underserved-ELA				
Underserved-MATH				
All Student Growth-ELA				
All Student Growth-MATH				
Growth: Economically Disadvantaged-ELA				
Growth: Economically Disadvantaged-MATH				
Growth: ELL-ELA				
Growth: ELL-MATH				
Growth: Students with Disabilities-ELA				
Growth: Students with Disabilities-Math				
Growth: Underserved-ELA				
Growth: Underserved-MATH				
Alignment to CCSS		X		
Graduation/post-secondary readiness				
Graduation percent				
School completion/Diploma				
Drop out percentage				
Current Ratio: Assets/Liabilities		X		
Unrestricted Cash		X		
Enrollment Variance				
Loan Default		X		
Total Margin (income /revenue				
Debt to Asset Ratio		X		
Cash Flow				X
Debt Service Coverage Ratio				
Reporting and Compliance		X		
GAAP		X		
Education Program Implementation		X		
Education Requirement Compliance		X		
Rights of Students with Disabilities		X		
Rights of ELL		X		
Governance Compliance		X		
Administration Accountability		X		
Reporting Requirement Compliance		X		
Rights of All Students		X		
Staff Credentialing Requirements		X		
Facilities and Transportation Requirements		X		
Health and Safety Requirements		X		
Student Information		X		
Other Obligations		X		

N/A

EAGLE CHARTER SCHOOL RENEWAL REPORT

SUBMITTED BY, KRISTEN MILES, OSBA
MARCH 9, 2022

EXECUTIVE SUMMARY

Eagle Charter School (Eagle) opened in 2011. The school serves approximately 135 students in Salem, Oregon at the Oregon School of the Deaf. Its mission is: "Each student embraces lifelong learning and applies skills in technology, global literacy, creativity, and critical thinking to enhance family, career, and community". Eagle's goal is to apply an equity lens to the entire Eagle Charter School community to ensure full inclusion and access.

Eagle's contract with the State Board of Education (SBE) ends on June 30, 2022, and Eagle has requested renewal of the contract per ORS 338.065(5)(b). The school has submitted a renewal application, documentation supporting the application, and other information pertinent to the renewal request.

ORS 338.065(8)(a)(A-E) state the criteria the board must use to determine whether to renew a charter school. This report will align the renewal recommendation with the statutory criteria.

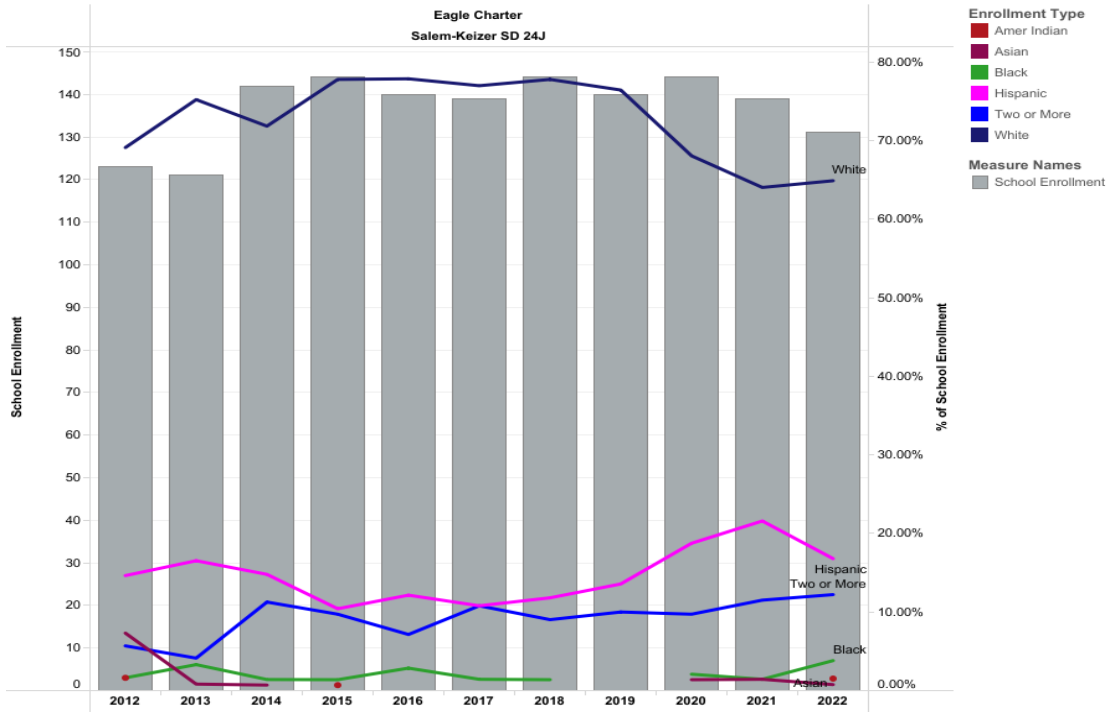
Enrollment Breakdown (School Level)

District: Salem-Keizer SD 24J

School(s): Eagle Charter

Note: Free Reduced Lunch values over 100% of enrollment are caused by some schools serving hot lunch to other nearby schools

Source: Oregon Department of Education

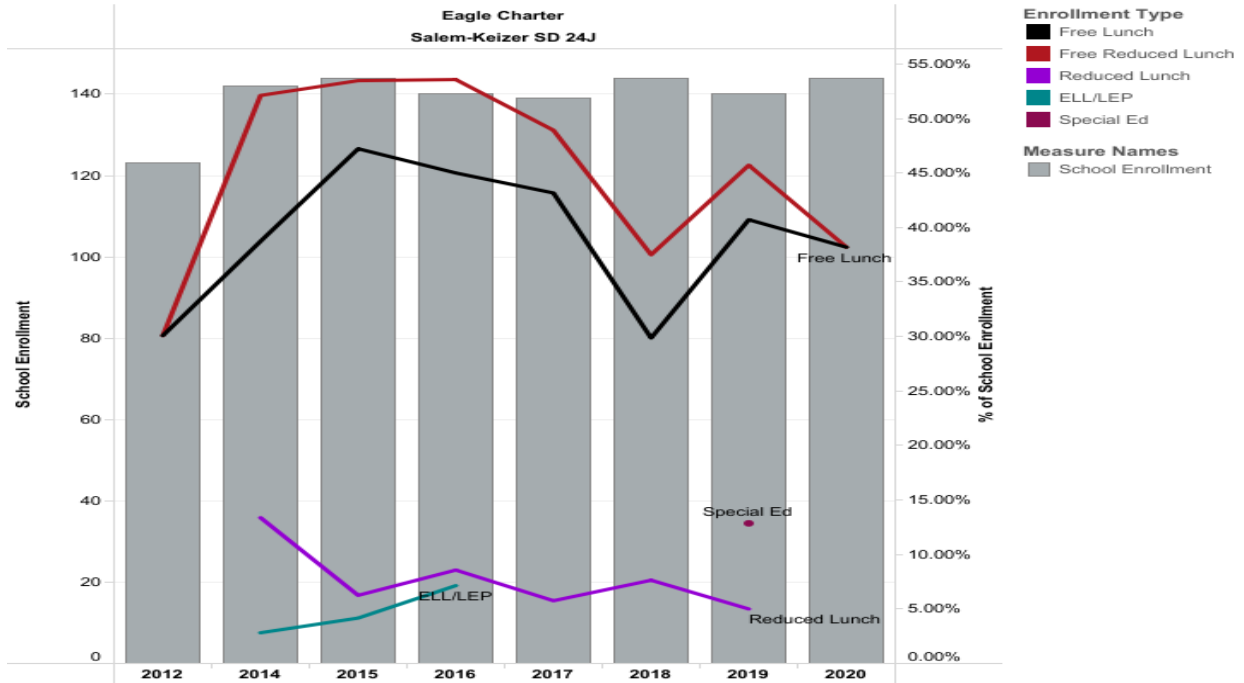


Enrollment Breakdown (School Level)

District: Salem-Keizer SD 24J

School(s): Eagle Charter

Note: Free Reduced Lunch values over 100% of enrollment are caused by some schools serving hot lunch to other nearby schools
Source: Oregon Department of Education



ORS 338.065(8)(A)(A): WHETHER THE CHARTER SCHOOL IS IN COMPLIANCE WITH THIS CHAPTER AND ALL OTHER APPLICABLE STATE AND FEDERAL LAWS

As per the requirements of the renewal application, the principal/superintendent has provided evidence of submitting reports to the board. Examples of topics in these reports are COVID-19 updates, enrollment, staffing, equipment and technology, facilities, finances, safety, attendance, academics, microsociety, iReady (testing), PBIS, staff training, field trips, parent night/events, after school programs, and additional considerations.

Eagle keeps minutes and posts agendas in compliance with applicable public meetings laws.

Eagle appears to be in compliance with ORS 338 requirements and other applicable state and federal laws.

All teachers are properly licensed as required, though the school administrator and one teacher are currently in a grace period.

The lottery application for Eagle only contains information related to a student’s age, grade, and resident district, which is appropriate for a lottery application. All other information should be collected during the enrollment process.

Policies on the website are in draft form. These should be adopted as soon as possible and updated on the website.

ORS 338.065(8)(A)(B): IS IN COMPLIANCE WITH THE CHARTER OF THE PUBLIC CHARTER SCHOOL

Eagle reports being compliant with the reporting requirements in the charter and submits deliverables in a timely fashion. The school has improved its finances and implemented a comprehensive distance learning plan that served students during the 2020-21 school year.

Eagle submitted climate surveys administered to teachers, families, and students for the 2021 year. The vast majority of respondents reported either positive or very positive feelings about working at, attending, or having their student attend Eagle Charter School.

ORS 338.065(A)(C) IS MEETING OR WORKING TOWARD MEETING THE STUDENT PERFORMANCE GOALS AND AGREEMENT SPECIFIED IN THE CHARTER OR ANY OTHER WRITTEN AGREEMENTS BETWEEN THE SPONSOR AND THE CHARTER SCHOOL GOVERNING BODY

Students have not been able to participate meaningfully in the state assessment since the 2018-19 school year, due to the pandemic starting in March 2020. State data will not be used to determine whether or not the school has met this requirement. Instead, Eagle has used internal assessments such as iReady, easyCBM, DRA, and other formative assessments created by teachers at the classroom level. Because of the social-emotional impacts of not being in classrooms, the school determined that these assessments were not valid upon return to school, and that the focus on socialization of students and social-emotional support of acclimating students to the learning environment again was critical. Like most schools in Oregon and across the country, Eagle acknowledges that students experienced some learning loss and is working this year to mitigate that loss and bring students back to grade level as soon as possible, while centering equity and ensuring a focus on social-emotional health and well-being.

Eagle provided a comprehensive distance learning plan for the 2020-21 school year. Classes started in late morning and were interspersed throughout the day. Office hours for parents and students were offered throughout the day and into the evenings, and counseling services were offered three days a week. Not all parents took advantage of these opportunities, but Eagle did engage in outreach to ensure that the availability of them was clear. Technology was provided to students and instruction was given both synchronously and asynchronously through Zoom, Google Meets, and paper packets. Students were also provided school supplies in their activity packets. Materials specific to students' IEPs were provided, and the school provided snacks to students experiencing food insecurity.

Eagle took advantage of funding for a summer enrichment program and reached 59% of the student body. Offerings included reading, writing, math, STEM, and PE.

Eagle hired a part-time distance learning teacher who works with students who are in quarantine or who are at home awaiting test results in order to ensure continuity of instruction.

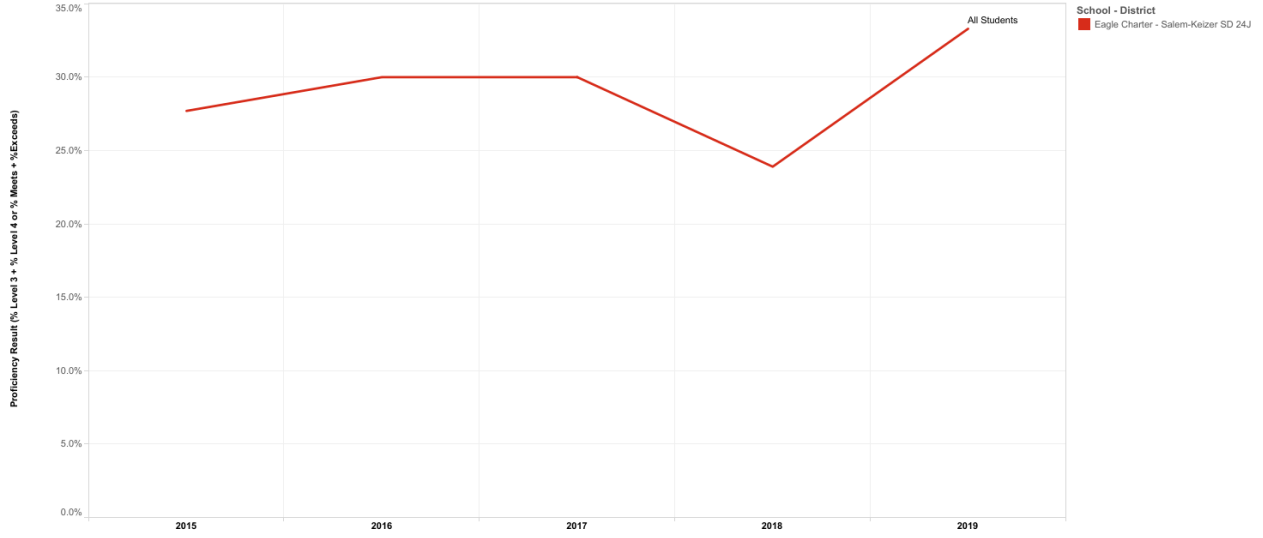
State testing results for the years prior to the 2019-20 school year are below.

Math:

Results by School and Year

District(s): Salem-Keizer SD 24J
 School(s): Eagle Charter
 Test Area: Mathematics

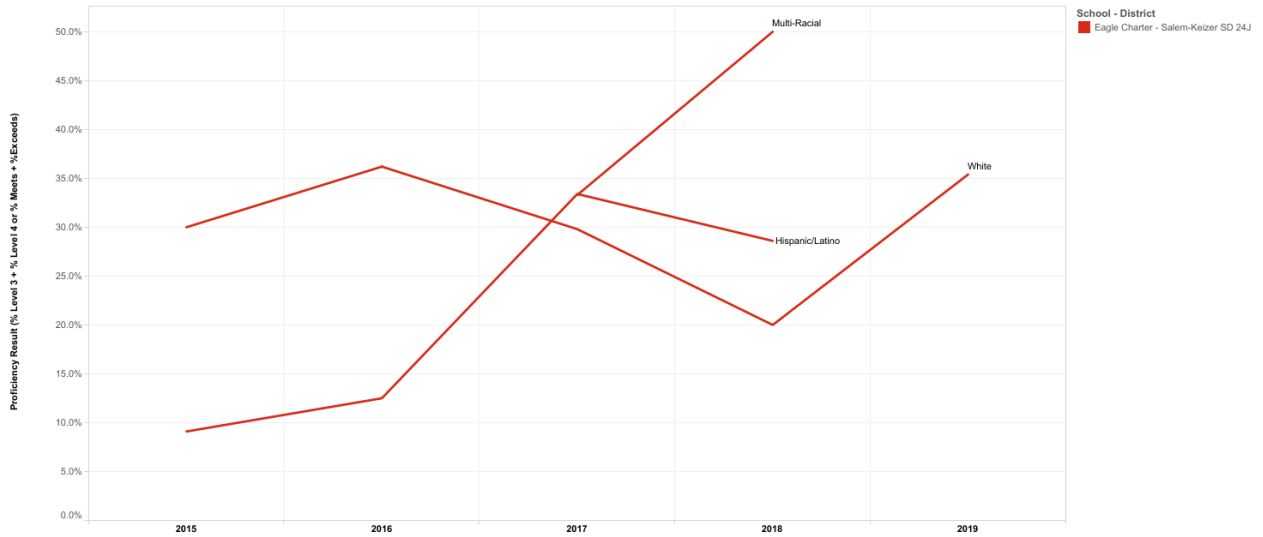
Note: If Percent Level 3 or 4 / Meets or Exceeds is less than 5% or greater than 95% or fewer than 6 students tested, all performance levels are suppressed.
 Source: OR Department of Education



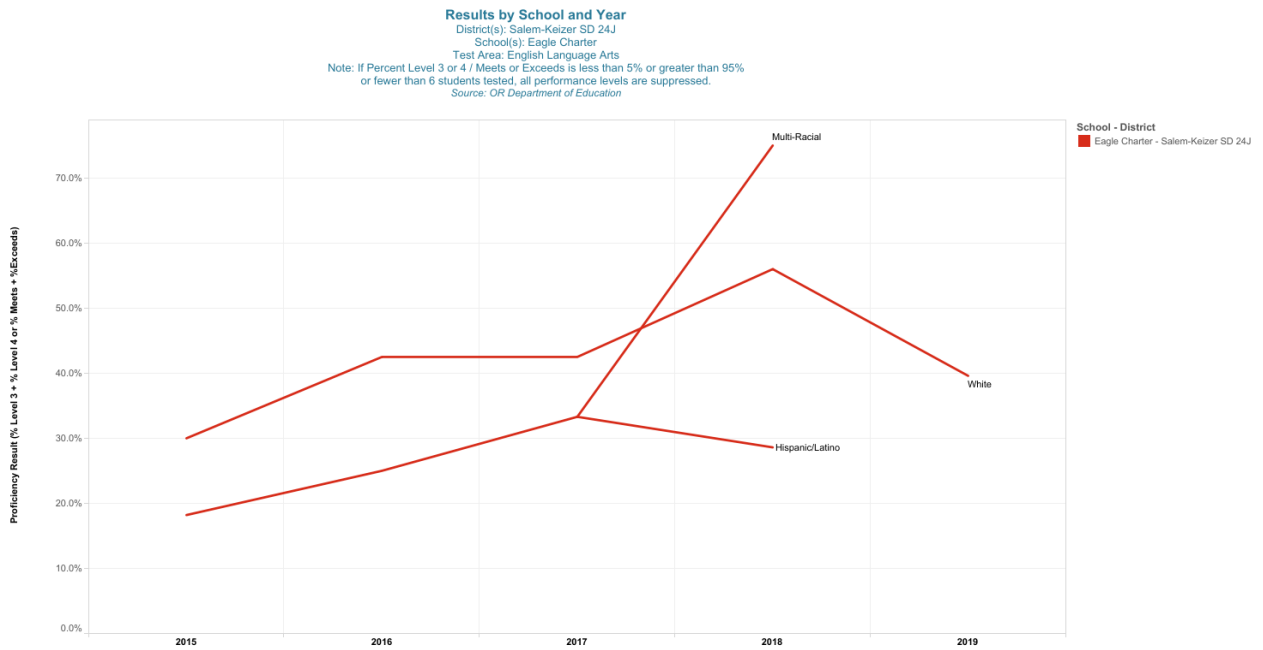
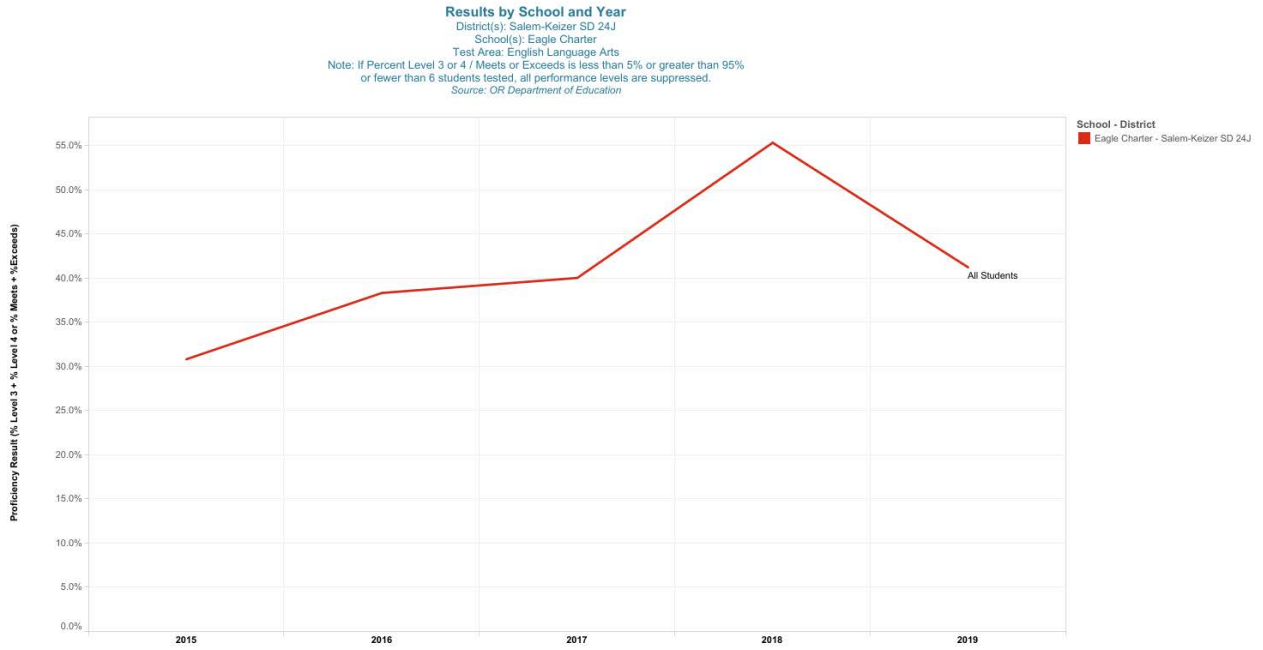
Results by School and Year

District(s): Salem-Keizer SD 24J
 School(s): Eagle Charter
 Test Area: Mathematics

Note: If Percent Level 3 or 4 / Meets or Exceeds is less than 5% or greater than 95% or fewer than 6 students tested, all performance levels are suppressed.
 Source: OR Department of Education



English Language Arts:



ORS 338.065(A)(D) IS FISCALLY STABLE AND HAS USED THE SOUND FINANCIAL SYSTEM DESCRIBED IN THE PROPOSAL SUBMITTED UNDER ORS 338.045 AND INCORPORATED INTO THE WRITTEN CHARTER UNDER THIS SECTION

Currently, the school has a “rainy day fund” of approximately \$223,000. The school reports meeting financial reporting requirements.

As per the municipal audits submitted for this renewal evaluation:

- Current ratio (current assets/current liabilities) = 8.33. Meets standard
- Unrestricted days cash on hand = 40 days. Meets standard
- Default = No. Meets standard
- Debt to asset ratio (total liabilities/total assets) = .11. Meets standard
- Multi-year cash flow (Year 3 total cash – year 1 total cash) = (\$178,534). Falls far below standard
- One-year cash flow (Year 3 total cash – year 2 total cash) = \$10,797. Meets standard

Like with all charter schools during the pandemic, maintaining a positive net position is a challenge. The audit for the year ending June 30, 2021 states that the school’s net position decreased by \$272,972, as this was the amount that expenditures outpaced revenues. Total net position was (\$385,246).

The school notes that if ESSER funding were to decrease and other funding or an increased enrollment cap does not replace this, then Eagle will need to spend down some of its reserves and reduce staffing levels.

Scenario 1 of Eagle’s budget is built on an assumption of 144 students. Total operating revenue in Scenario 1 of the charter school’s budget shows a decrease in the total operating revenue through the 2023-24 school year, and 2024-25 being essentially equivalent to 2023-24. The ending fund balance decreases in each of these years to less than \$10,000, but each year includes a rainy day fund of either \$45,000 or \$25,000.

Scenario 2 of Eagle’s budget is built on an assumption of 166 students starting in the 2022-23 school year. Total operating revenue is projected as steady for each of the years in this budget. Ending fund balances for each of these years fall between \$22,000 and \$80,500, but the budget does not include a rainy day fund.

Eagle submitted a plan to address both material weaknesses and significant deficiencies reported in its audit for the year ending June 30, 2020.

Material weaknesses included:

- Segregation of duties
- Transactions recorded in the incorrect period

Significant deficiencies included:

- Lack of internal controls over journal entries
- Improper recording of lunch fund transactions
- Preparation of financial statements in accordance with GAAP

ORS 338.065(A)(E) IS IN COMPLIANCE WITH ANY RENEWAL CRITERIA SPECIFIED IN THE CHARTER OF THE PUBLIC CHARTER SCHOOL

There does not appear to be any additional renewal criteria in the charter contract.

COMMENDATIONS

Eagle provided a comprehensive plan of service for students and families during CDL with many options for synchronous, asynchronous, and hands-on learning, as well as access to teachers and counselors outside of school hours. Distance learning continues to be available for students who are at home due to quarantine or who are awaiting test results.

RECOMMENDATIONS

The school should continue to monitor its financial health and ensure that ODE is informed regularly about its cash flow status, particularly since its net position has decreased significantly and is negative as of June 30, 2022. A comprehensive plan to ensure current and future financial health for the next term of the contract is recommended.

RENEWAL RECOMMENDATION

Eagle Charter School meets the criteria for renewal under ORS 338.065. Renewal of the charter is recommended.

Oregon State Board of Education

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AGENDA ITEM: 7.A.

<p>SUBJECT: Eagle Charter School Renewal (State Board Sponsored)</p> <p>STAFF NAME & OFFICE: Kate Pattison, Charter School Specialist; Emily Nazarov, Government and Legal Affairs Manager; Marie Balance, Eagle Charter School</p> <p>Summarize the issue. Three to five sentences that explains the subject and the need for board attention—what’s the problem/concern/issue? If this is a rule, what is the change that needs to be made?</p> <p><input type="checkbox"/> New Rule <input type="checkbox"/> Amend Existing Rule <input type="checkbox"/> Repeal Rule</p>	<p><input checked="" type="checkbox"/> First Reading <input checked="" type="checkbox"/> Presentation <input type="checkbox"/> No Presentation</p> <p><input type="checkbox"/> Action <input type="checkbox"/> Temp Rule Presentation <input type="checkbox"/> No Presentation</p>
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BACKGROUND

EAGLE Charter School is one of four Oregon State Board of Education sponsored charter schools and is located in the Salem-Keizer School District. Approved for sponsorship in December 2010, EAGLE opened in September 2011. The school is currently in its eleventh year of operation serving about 140 students in grades K-5, using the Microsociety model. Students create and operate businesses, produce goods, manage inventory, sell products to other students and the general public, predict profits and losses, predict market trends, and adjust production to meet customer demand. In the Eagle Microsociety of Eagleton, students become business managers, workers, consumers, bankers, legislatures, judges, police officers, journalists, and more. In doing so, students create and take part in every aspect of a model society, including learning to deal with troublesome aspects of their society; economic changes due to market success and failure, and crime/punishment, preparing students for life in the 'real world'.

The State Board of Education received official written request from EAGLE for renewal of the charter contract pursuant to ORS 338.065. This is EAGLE’s third request to renew their charter contract. The school’s renewal request is for a five year charter contract.

On February 1, 2022, Department staff conducted a public hearing via Zoom for the Eagle Charter School community to provide input regarding the renewal. Nineteen people attended, including students, parents, staff, and Eagle Charter School board members. Eight people provided spoken testimony at the meeting in favor of the renewal. The Oregon Department of Education (ODE) also received written testimony in favor of the renewal. (Please see the Public Hearing Officer’s Report and public hearing written testimony attached to this docket).

Renewal Process:

Public charter schools must be renewed by their authorizing board to continue operating. The renewal process and criteria for evaluating the school’s performance is outlined in ORS 338. Over the last five years, ODE staff have visited the school and met with school leadership many times. The school received a formal visit each year and informal visits, including observations of the charter school board meetings and professional development for instructional staff. As part of the ongoing oversight and accountability, the school has participated in formal visits, required trainings, and submitted reports to ODE. The information gathered from the visits and reports, presented in three categories (academic

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performance, organizational performance, and fiscal performance) serve as the foundation for staff recommendation regarding the renewal of this school.

The Department contracted with an external evaluator to complete the 2020-21 Performance Framework and renewal evaluation. The reports from this evaluation were used to supplement the Department's overall evaluation of the school's performance during the term of the charter contract. The reports are also included as attachments for the Board to review.

Academic:

Eagle Charter School has struggled to meet academic indicators of success in the first two years of the charter contract. In 2020, the State Board considered terminating the charter school in large part due to academic performance. The recommendation to terminate came from Department staff at the conclusion of a mid-term review as required by the charter contract. Because the school demonstrated low academic performance in prior terms, this mid-term review was included as a requirement of the charter school contract by the Board during the last renewal process. Following the mid-term review, which took place at the beginning of the COVID-19 pandemic, the Board voted to allow Eagle Charter School to continue operating throughout the remainder of the current contract term. This decision was made despite the State Assessment System requirements being paused for the 2019-20 school year due to the COVID-10 Pandemic response. Eagle Charter School was just shifting to Distance Learning for All at the time of the decision and it was not clear how many years of data would be unavailable. State assessments were paused for two years, however, the school will be administering the State Assessment System for the 2021-22 school year. This year's data will establish a new baseline for future academic performance ratings if the school is renewed.

After the Board voted to continue the school, Eagle implemented a robust Distance Learning for All educational program for the remainder of the 2019-20 school year that was reviewed by Department staff. The school demonstrated a high level of student and family engagement, teacher support, and a thorough academic program that was rolled out immediately and sustained throughout the school year. With the support of additional counseling staff and all teachers, the school was able to ensure students and families stayed connected to school, had necessary equipment and connectivity to access the learning.

In 2020-21, Eagle started the year supporting students and families navigating the wildfires. Eventually, the instructional school year began with students accessing learning through Comprehensive Distance Learning. Eagle's model included a full schedule of live lessons that were recorded and made accessible to students. Teachers provided opportunities for group lessons and one-on-one support. The school ensured all students had access to counseling supports and provided access to parents who needed additional help. In the spring of 2021, after the school community recovered from the ice storm, Eagle brought students back on campus through Limited In-Person Instructional opportunities.

Throughout the pandemic, parents and staff reported that Eagle felt nimble and responsive, "like we never missed a beat," as one parent said during a focus group. Parents felt like their students were able to move forward with their learning and get more support than students from other schools they knew. Eagle demonstrated strong commitment to academics during the last years and used a variety of technologies to ensure continuity of learning. In the current school year, all students have access to in-person learning. The school hired a teacher to provide instruction and support to any students who

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AGENDA ITEM: 7.A.

were in quarantine or isolation. Counseling support has continued to be a cornerstone to the school’s approach to students and staff returning this year. As observed during visits and throughout regular check-ins with the school leadership, many of the behavioral challenges that were present before the pandemic are no longer an issue at the school. Staff attribute this to some amount of attrition, COVID-19 mitigation protocols that created emergency school-wide expectations for behavior and safety and disrupted prior behaviors, stronger staff cohesion, and strong school leadership. Below are the previous academic ratings for Eagle Charter School. The school was not rated during the suspension of the state assessment system.

Figure 1 – Eagle Charter School Academic Performance Framework Ratings 2017-2021

MEASURE		2017-18 Rating	2018-19 Rating	2019-20 Rating	2020-21 Rating
1c	Economically Disadvantaged-ELA	Meets	Falls Far Below	No Rating	No Rating
1d	Economically Disadvantaged-MATH	Falls Far Below	Does Not Meet	No Rating	No Rating
1e	English Learners-ELA	No Rating	Falls Far Below	No Rating	No Rating
1f	English Learners-MATH	No Rating	Falls Far Below	No Rating	No Rating
1g	Students with Disabilities-ELA	Exceeds	Falls Far Below	No Rating	No Rating
1h	Students with Disabilities-MATH	Falls Far Below	Meets	No Rating	No Rating
1i	Underserved-ELA	Falls Far Below	Meets	No Rating	No Rating
1j	Underserved-MATH	Does Not Meet	Falls Far Below	No Rating	No Rating
2a	All Student Growth-ELA	Meets	Meets	No Rating	No Rating
2b	All Student Growth-MATH	Meets	Meets	No Rating	No Rating
3a	Growth: Economically Disadvantaged-ELA	Meets	Meets	No Rating	No Rating
3b	Growth: Economically Disadvantaged-MATH	Meets	Does Not Meet	No Rating	No Rating
3e	Growth: Students with Disabilities-ELA	Meets	Does Not Meet	No Rating	No Rating
3f	Growth: Students with Disabilities-MATH	Does Not Meet	Falls Far Below	No Rating	No Rating
3g	Growth: Underserved-ELA	Meets	Does Not Meet	No Rating	No Rating
3h	Growth: Underserved-MATH	Falls Far Below	Does Not Meet	No Rating	No Rating
4a	Alignment to CCSS	Meets	Meets	Meets	Meets

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Operational:

Eagle has maintained strong compliance with most areas of operational performance expectations. The two areas of opportunity in the last four and half years are noted in the 2018-19 school year as “Does Not Meet” for Rights of Students with Disabilities and Rights of ELL students. In that year, Eagle did not have an EL plan in place that was compliant with requirements for the weighted funding and necessary services. The school submitted a corrected plan that was approved by ODE. In the spring of 2019, Eagle was found to have been out of compliance with some special education requirements during an investigation and complaint against Salem-Keizer School District. The charter school worked with the district and the Department to remedy these deficiencies and has since demonstrated compliance. Below are the operational ratings for each year of the charter contract.

Figure 2 – Eagle Charter School Operational Performance Framework Ratings 2017-2021

MEASURE		2017-18 Rating	2018-19 Rating	2019-20 Rating	2020-21 Rating
10a	Education Program Implementation	Meets	Meets	Meets	Meets
10b	Education Requirement Compliance	Meets	Meets	Meets	Meets
10c	Rights of Students with Disabilities	Meets	Does Not Meet	Meets	Meets
10d	Rights of ELL	Meets	Does Not Meet	Meets	Meets
11a	Governance Compliance	Meets	Meets	Meets	Meets
11b	Administration Accountability	Meets	Meets	Meets	Meets
11c	Reporting Requirement Compliance	Meets	Meets	Meets	Meets
12a	Rights of All Students	Meets	Meets	Meets	Meets
12b	Staff Credentialing Requirements	Meets	Meets	Meets	Meets
13a	Facilities and Transportation Requirements	Meets	Meets	Meets	Meets
13b	Health and Safety Requirements	Meets	Meets	Meets	Meets
13c	Student Information	Meets	Meets	Meets	Meets
14a	Other Obligations	Meets	Meets	Meets	Meets

Financial:

The school has completed annual municipal audits and submitted financial reports to the Department each year of the charter contract. The school has consistently met a majority of the performance indicators and has made recent improvements in areas that have proved more difficult for the school.

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The two significant areas to note are the GAAP requirements that the charter school did not meet for three years in a row until meeting the standard last year. These concerns were raised during the mid-term review in 2020, and focused on improper recording of some transactions, some transactions recorded in the incorrect period, and consistent lack of internal controls. Many charter schools struggle with internal control deficiencies due to organizational size and structure. However, the Department considers financial management a critical area for compliance because financial management is the leading reason for charter school closure in Oregon. The school submitted a corrective action plan to the Secretary of State and has made significant improvements led by school and board leadership. The most recent audit was free from material weaknesses but the school did record a significant decrease in multi-year cash flow. The school did respond to this indicator and it is noted that many schools faced disruptions in cash flow due to the pandemic response. The Department will continue to monitor financial management and sustainability closely if the school is renewed. Below are the financial ratings for the current term of the charter contract.

Figure 3 – Eagle Charter School Financial Performance Framework Ratings 2017-2021

MEASURE		2017-18 Rating	2018-19 Rating	2019-20 Rating	2020-21 Rating
7a	Current Ratio: Assets/Liabilities	Meets	Meets	Meets	Meets
7b	Unrestricted Cash	Meets	Meets	Meets	Meets
7d	Loan Default	Meets	Meets	Meets	Meets
8a	Total Margin (income /revenue)	Meets	Does Not Meet	Meets	Meets
8b	Debt to Asset Ratio	Meets	Meets	Meets	Meets
8c	Cash Flow	Meets	Meets	Meets	Falls Far Below
8e	Reporting and Compliance	Does Not Meet	Meets	Meets	Meets
8f	GAAP	Does Not Meet	Does Not Meet	Does Not Meet	Meets

Note: Financial indicators include only 2-3 levels of performance, removing the “exceed” level. Therefore, “meets” is the highest level and color codes are adjusted accordingly.

Oregon State Board of Education

March 17, 2022

AGENDA ITEM: 7.A.

Statutory Renewal Criteria Evaluation

ORS 338.065 requires the board to use the following review criteria as the basis for the decision:

Figure 4 – Statutory Renewal Criteria Evaluation

ORS 338.065 Renewal Criteria	ODE Evaluation
(A) Is in compliance with this chapter and all other applicable state and federal laws;	YES – Eagle Charter School is working toward maintaining compliance with state and federal laws.
(B) Is in compliance with the charter of the public charter school;	YES – Eagle Charter School is working toward maintaining compliance with the terms of the charter contract.
(C) Is meeting or working toward meeting the student performance goals and agreements specified in the charter or any other written agreements between the sponsor and the public charter school governing body;	YES – Eagle Charter School is working toward meeting the performance goals and agreements in the charter contract and the performance framework. The most critical area of opportunity is academic performance but no state data was available for the 2019-20 and 2020-21 school years.
(D) Is fiscally stable and has used the sound financial management system described in the proposal submitted under ORS 338.045 and incorporated into the written charter under this section; and	YES – Eagle Charter School is working toward maintaining fiscal stability and a sound financial management system.
(E) Is in compliance with any renewal criteria specified in the charter of the public charter school.	YES - Eagle Charter School has demonstrated growth and progress toward meeting the expectations in the Performance Framework.

The Department’s renewal recommendation aligns with the recommendation from the external evaluator that Eagle Charter School has met the statutory evaluation criteria in all categories and should be renewed. Please see the attached renewal evaluation report.

SUMMARY OF PREVIOUS BOARD ACTION

On June 22, 2017, the State Board of Education (State Board) approved a five-year charter contract for Eagle Charter School (Eagle) that included a mid-term review of the school in year three. The review was conducted by the Oregon Department of Education (ODE) to determine whether Eagle was making progress toward meeting the expectations in the Performance Framework and demonstrating growth in formative data collected by the school. In 2020, ODE completed the review and recommended the State Board terminate Eagle Charter School at the end of the 2019-20 school year. The State Board did not terminate the charter school but agreed to a use an external evaluator during the renewal process.

HAS THE RULE CHANGED SINCE LAST BOARD MEETING?

- N/A; first read—hasn’t been before board
- No; same as last month
- Yes – As follows:

Oregon State Board of Education

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AGENDA ITEM: 7.A.

POLICY ISSUE OR CONCERNS

ORS 338.065 requires the board to use the following review criteria as the basis for the decision:

(6)(a) The sponsor shall base the charter renewal decision on a good faith evaluation of whether the public charter school:

(A) Is in compliance with this chapter and all other applicable state and federal laws;

(B) Is in compliance with the charter of the public charter school;

(C) Is meeting or working toward meeting the student performance goals and agreements specified in the charter or any other written agreements between the sponsor and the public charter school governing body;

(D) Is fiscally stable and has used the sound financial management system described in the proposal submitted under ORS 338.045 and incorporated into the written charter under this section; and

(E) Is in compliance with any renewal criteria specified in the charter of the public charter school.

EAGLE Charter School has at least minimally met the evaluation criteria in all categories. The student performance of the school is an ongoing area of concern since there is no summative academic data from state assessments for the 2019-20 and 2020-21 school years. Eagle will implement the state assessments this school year to establish a new baseline that can be used for future evaluations.

Salem-Keizer School District

On February 4, 2022, Department staff met with Salem-Keizer School District leadership regarding Eagle Charter School. We discussed the school's relationship with the district and student performance. In recent years, Salem-Keizer School District has not had concerns about Eagle Charter School. Most of the district's relationship to the school has centered on pass through funding, including State School Funds, ESSER, and SIA dollars. The charter school has been responsive to requests and special education responsibilities. When considering the renewal, SKSD does not have concerns about the charter school continuing for another 5 years.

During the conversation, the staff discussed the charter school's interest in expanding enrollment either in current grade levels or adding grades 6, 7, or 8. We discussed the academic performance issues pre-pandemic and the lack of current outcomes data, citing both as concerns for expansion. And we discussed the challenges of expanding for middle school levels, the complexities those grade levels add to school systems and cultures, and that these are also concerns for Eagle expanding. Generally, the district has some concerns about expansion but most of the concern is centered on unknowns around current academic performance and adding middle school grades.

EQUITY IMPACT ANALYSIS

Eagle Charter School is located on the Oregon School for the Deaf campus in North East Salem. The school has served about 140 students in grades K-5 since 2011. It serves students using a micro-society program model and is a school of choice for Salem-area students seeking an alternative to other public or private schools in the area. Eagle Charter School demographics do not mirror the make-up of the

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AGENDA ITEM: 7.A.

community in which it is located or the district as a whole. This can be observed in the School and District profile reports (attached).

If the school is renewed for another 5-year term, the school should continue strengthening its core instructional program, improve supports and services to emergent bilingual/multilingual students and families, sustain efforts for students with disabilities, and evaluate the school's cultural representation and welcome to families who reside in the neighborhoods where the school is located. This should also include strategies for recruiting and retaining more diverse instructional staff and board leadership.

FISCAL ANALYSIS

A decision to not renew Eagle Charter School would result in a loss of about \$105,000 a biennium. This is equivalent to about 16% of the funds the Department receives from the state sponsored charter schools that is used to fund all charter school staff and programs at ODE.

EFFECT OF A "YES" OR "NO" VOTE

"Yes" = Eagle Charter School will be allowed to operate for another 5 years so long as it operates according to the law and any specific requirements or target negotiated into a new contract.

"No" = Eagle Charter School would be able to finish the current school year and would eligible to file for a judicial review of the Board's decision. If the charter schools files for judicial review, the court may remand the decision back to the Board for reconsideration. The charter school could also choose not to file for judicial review and close at the end of the school year.

STAFF RECOMMENDATION

Approve Approve next month No recommendation at this time
Prompted by: State law changes Federal law changes other

ATTACHMENTS

- Attachment 1: Eagle Charter School Renewal Application
- Attachment 1: Eagle Charter School Demographic Information 3-Year Comparison
- Attachment 3: FINAL Eagle Renewal Evaluation Report
- Attachment 4: FINAL Eagle Performance Framework 2021-22
- Attachment 5: Eagle Charter School At-A-Glance Profile 2020-21
- Attachment 6: Salem-Keizer School District At-A-Glance Profile 2020-21
- Attachment 7: Eagle Charter School Hearing Officer Report February 2022

Oregon State Board of Education

March 17, 2022

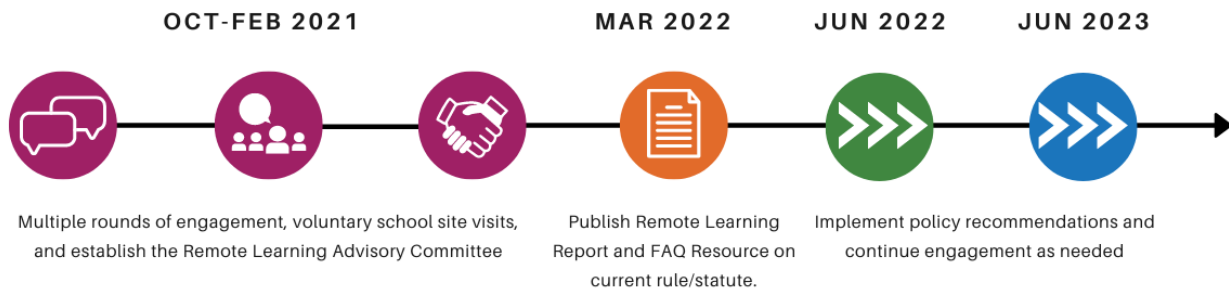
AGENDA ITEM:

<p>SUBJECT: Remote Learning Program Quality Standards Update</p> <p>STAFF NAME & OFFICE: Kate Pattison, Charter School Specialist, Director’s Office; Ken Greenbaum, Director of Digital Learning and Allie Ivey, Digital Learning Specialist, Office of Teaching and Learning</p> <p>Update to the Board on the Department’s efforts to identify program quality standards for remote and online instructional models.</p>	<p><input checked="" type="checkbox"/> Informational Presentation</p> <p><input type="checkbox"/> Written Report</p>
-----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------	------------------------------------------------------------------------------------------------------------------------------------

BACKGROUND

Remote learning programs have expanded across Oregon for well over a decade in the form of specialized courses available to students in rural communities, hybrid and virtual options for local schools, virtual public charter schools, and home-based options. Most recently, remote learning has become a familiar part of many student’s education through the COVID-19 pandemic response. Even with a return to in-person learning for the significant majority of public schools, remote learning will likely continue to play a role in K-12 public education. Accordingly, we are seeking input on establishing program quality standards for remote learning. These program standards will ensure the development and implementation of remote learning options that equitably support student learning.

Remote Learning Program Standards Timeline



In December 2021, Department staff provided an introduction and overview of this work and the initial engagement plan. Staff have since conducted further engagement and started to draft standards for remote learning options in Oregon. This report to the Board includes further updates on the progress of the engagement and a draft of program quality standards currently being reviewed by education partners and the Remote Learning Advisory Committee.

POLICY ISSUE OR CONCERNS

The current standards cover a wide array of programmatic requirements from statute, administrative rule, and agency policy. As the Department articulates the quality program standards, the next question is to determine how the standards will be rolled out and where the accountability will be held. The Department is currently exploring options for rulemaking and legislative concepts. Whether in rule or statute, the standards will require a well-communicated, highly supportive, phased-in approach to implementation to ensure schools and districts can design or modify programs to ensure high quality remote and online instruction for students.

Oregon State Board of Education

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AGENDA ITEM:

EQUITY IMPACT ANALYSIS

The purpose of this work is to ensure that all students, especially those most historically and systemically marginalized, have access to the benefits of a remote learning model within a system that serves all students equitably. Additionally, the findings presented in the 2017 Secretary of State Audit provide a critical opportunity to respond to the growing increase in remote learning options and enrollment in remote schools and programs across Oregon through the development of a framework of standards for current and potentially new policy for remote/online learning.

The Department has identified these foundational assertions regarding this work and outcomes for the remote learning program standards. That Oregon's children and youth are provided the following:

- Access to **high-quality instruction** where both the teacher and education leaders play an invaluable role in student learning and well-being;
- A **sense of belonging and safety** that is inclusive of students of color students of color, including students who are African-American/Black, Alaska Native and American Indian, Asian Pacific Islander, Refugee, Latino/a/x, Compact of Free Association (COFA) citizens, students who are emergent bilingual (English Learners), students of migrant and farmworker families, students receiving services under Section 504 or IDEA, students who are neurodivergent, students experiencing disability, and students who are LGBTQ2SIA+, where students' intersecting identities are honored and affirmed within the classroom and school culture by educators and the whole school community;
- **Culturally appropriate and anti-racist curriculum and quality instructional materials** aligned to Oregon content standards;
- **Access to school- or district-provided devices, digital resources, and connectivity** that are conducive to remote or online learning;
- Accommodations, modifications, differentiated instruction, and research-based strategies **address the strengths and needs of all students** including students experiencing disabilities, and emergent bilingual students;
- A **well-rounded education** with opportunities for peer engagement, mental health supports, and social emotional learning; and
- Culmination of learning in our Oregon K-12 system leading to a **diploma and the readiness** and disposition for post secondary pursuits.

To shape the remote learning program standards, ODE is meeting with education leaders and teachers from around the state, engaging with education partner organizations and ESDs, sharing information and listening to input from the student representative advisory groups, and creating a student and family survey. ODE will invite community organizations to help support students and families in completing the survey to ensure a wide range of voices and experiences are collected.

ATTACHMENTS

Attachment 1: Remote Learning Program Quality Standards Draft V

Attachment 2: [2017 Secretary of State Audit: Stronger Accountability, Oversight, and Support Would Improve Results for Academically At-Risk Students in Alternative and Online Education](#)

Remote Learning Program Quality Standards Draft V

Purpose: These standards are intended to bring focus to design elements that are critical to attend to within remote and online schools and programs. They do not represent all of the requirements for remote and online programs in Oregon. Rather, they are intended to work in concert with rule, statute, and systems of accountability and support to ensure high-quality remote and online learning with a focus on student learning and experience.

Pillar #1: Leading and Designing for Equity	
1.1	The school or program has a governance and organizational structure that supports equitable access and outcomes for all students.
1.2	The school or program meets all state and federal requirements for appropriate staffing and instructional time, and prioritizes teacher-student interaction through scheduling, instructional design, considerations regarding student-teacher ratio, and use of synchronous and asynchronous instruction.
1.3	The school or program uses an equity lens when engaging in planning and continuous improvement aligned for student success.
Pillar #2: School Culture and Student Services/Supports	
	440
2.1	The school or program provides access to comprehensive counseling.
2.2	The school or program has equity-oriented operational plans for responsive monitoring and support for student learning, belonging, and well-being.
2.3	The school or program creates conditions necessary to support individualized learning needs where learning is tailored to each student's identity, strengths, interests, and aspirations.
2.4	The school or program provides opportunities to develop authentic and meaningful connections with peers and adults, both within and outside of the school community.
2.5	The school or program provides opportunities for peer to peer learning through both asynchronous and synchronous means.
2.6	The school or program values students' funds of knowledge and creates an affirming learning environment that promotes students' sense of agency and purpose.
2.7	The school or program offers social emotional learning (SEL) resources and supports to ensure that students feel respected, valued, efficacious, and engaged in the classroom.
Pillar #3: Teaching, Learning, and Assessment	
3.1	The school or program has an instructional design that allows for equitable student-centered learning opportunities with particular attention to curricular relevance for students who are historically and systemically marginalized.

3.2 The school or program has instructional practices and assessments designed for purposeful online and/or remote pedagogies that support all students with particular attention to students who are historically and systemically marginalized.

3.3 The school or program is fully accessible and follows all applicable ADA and IDEA laws to support students on IEPs and students on 504s.

3.4 The school or program follows all federal and state laws for English learners and provides equitable access and cultural, academic, and linguistic supports for students who are emergent bilingual/multilingual.

3.5 The school or program monitors student learning and provides ongoing feedback through equitable assessment.

3.6 The school or program provides courses that are accessible and reflect a commitment to universal design for learning principles so that all learners can access all content and activities.

3.7 The school or program has strategic and sustained professional learning opportunities and teacher evaluation based on established professional standards for online and/or remote pedagogies.

3.8 The school or program has strategic and sustained professional learning opportunities for educational leaders to support leading for equity and providing instructional coaching for online and/or remote teaching and learning.

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3.9 The school or program has training for staff, students, and families on digital civics and digital citizenship which includes internet safety, student data privacy, and cybersecurity.

Pillar #4: Family/Community Engagement and Partnerships

4.1 The school or program has clear systems and methods of communication based on the program model that informs students and families of the following:

- 4.1a expectations of students and families based on the program model;
- 4.1b strategies to support the educational experience of students specific to the program model;
- 4.1c learning progress, levels of proficiency, and grades;
- 4.1d student well-being ;
- 4.1e training opportunities and technical support specific to the program model, curriculum, and communications format.

4.2 The school or program has established systems for family and community partnerships with regular opportunities for collaboration and shared decision-making among all partners.

Pillar #5: High-Quality Instructional Materials

5.1 The school or program has a robust and highly collaborative process of review that is aligned to state requirements for instructional materials adoption.

5.2 The school or program has culturally responsive and anti-racist instructional materials that can be updated or revised as needed.

5.3 The school or program includes provisions within instructional materials for students who experience disability, talented and gifted students, and students who are emergent bilingual/multilingual.

5.4 The school or program offers diverse materials that meet accessibility requirements of every learner.

Pillar #6: Equitable Access to Learning Pathways

6.1 The school or program, if operating using virtual learning, has systems and structures to support equitable access to appropriate digital devices and high-speed internet connectivity needed for learning.

6.2 The school or program has well-rounded learning opportunities including, but not limited to, STEM, STEAM, the Arts, extracurricular activities, physical education, field trips, dual credit opportunities, and clubs.

6.3 The school or program provides college and career readiness pathways, opportunities for career technical education (CTE) and support for post-secondary success.



Remote Learning Program Quality Standards: Update

Ken Greenbaum, Director of Digital Learning and Well-Rounded Access

Kate Pattison, Charter School Specialist

Allie Ivey, Digital Learning Program Specialist

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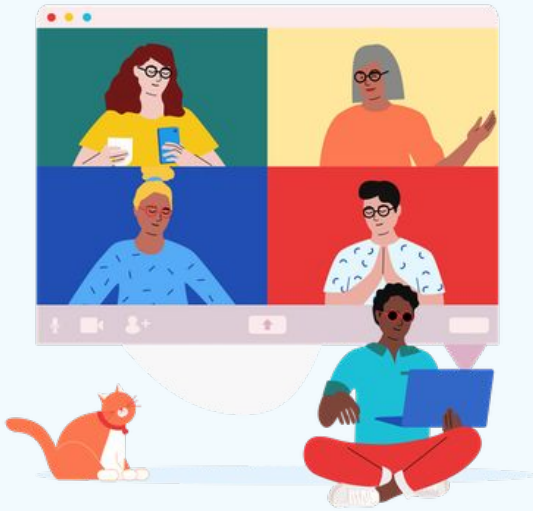
Presentation Overview



Image by Aaron Burden on [unsplash](#)

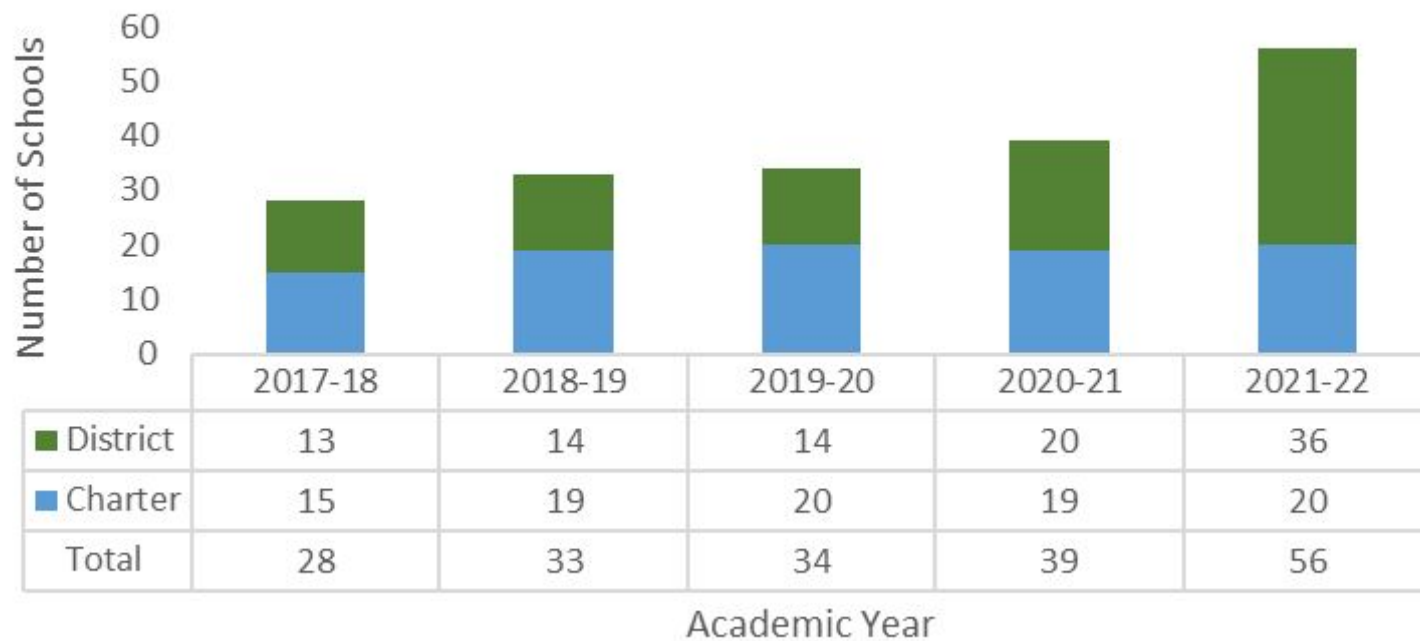
- Update on Engagement Process
- Remote Learning Quality Program Standards
- Next steps in the process

Setting the Context

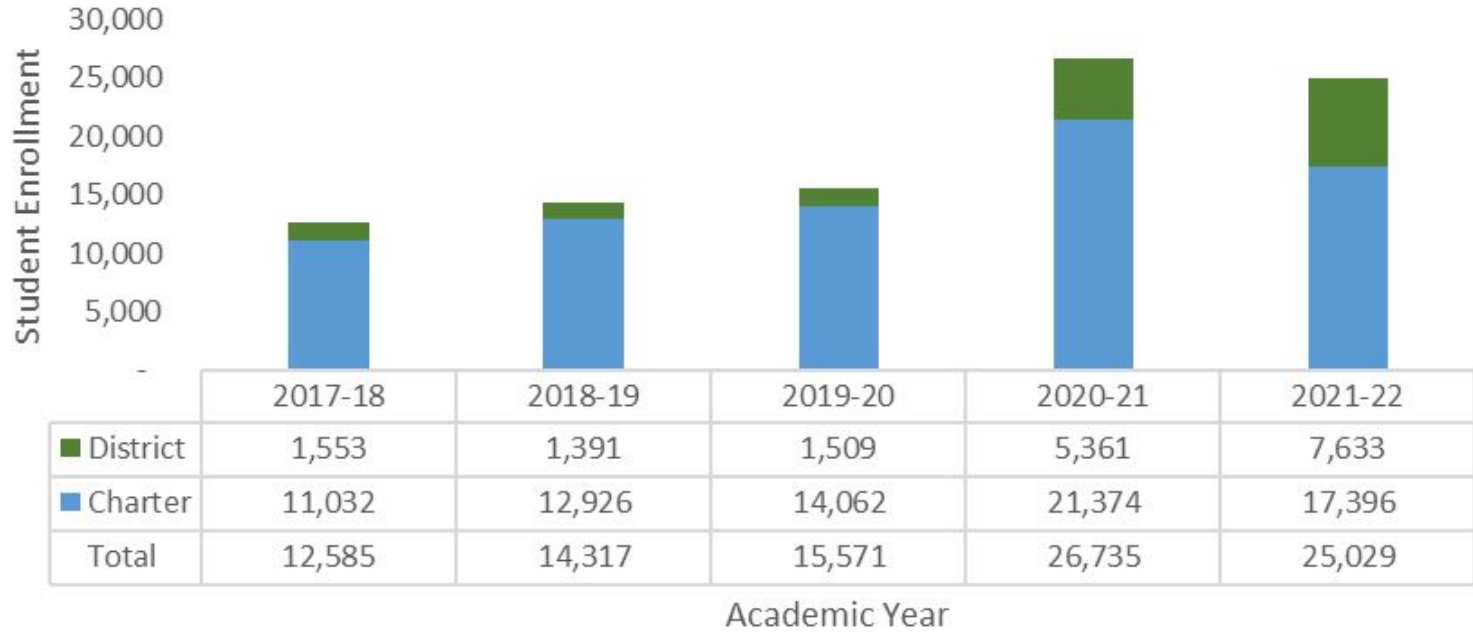


- Remote Learning Definition
- Remote Learning Program Quality Standards Definition
- Why this work now?

Number of Focus and Full Virtual Schools, by District/Charter Status: 2017-18 to 2021-22



District and Charter Full/Focus Virtual School Enrollment Over Time: 2017-18 to 2021-22



Program Quality Standards Design

Draft standards incorporate significant engagement with Oregon educators and the Remote Learning Advisory Committee. The standards also borrow inspiration from the National Standards for Quality Online Learning and standards from Colorado and Minnesota.



Engagement



Timeframe	Focus	Participation
Fall 2021	<ul style="list-style-type: none"> Learn about opportunities and challenges in remote learning Identify priorities in moving forward. 	>150 people with representation from school, districts, ESDs, education partners and student advisory groups
Winter 2022	<ul style="list-style-type: none"> Get feedback on the draft of the Remote Learning Program Quality Standards Share ideas around the operationalization of the standards 	>120 people with representation from school, districts, ESDs, education partners 449
Spring 2022	<ul style="list-style-type: none"> Get feedback on the draft of the Remote Learning Program Quality Standards Share ideas around the operationalization of the standards 	Student advisory groups and additional student and family groups

Remote Learning Program Quality Standards Pillars

Pillar #1: Leading and Designing for Equity

Pillar #2: School Culture and Student Services/Supports

Pillar #3: Teaching, Learning, and Assessment

Pillar #4: Family/Community Engagement and Partnerships

Pillar #5: High-Quality Instructional Materials

Pillar #6: Equitable Access to Learning Pathways

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The standards speak to what schools or programs should be most attuned to in their design and instruction.

Examples from Draft Standards

1.2 The school or program meets all state and federal requirements for appropriate staffing and instructional time, and prioritizes teacher-student interaction through scheduling, instructional design, considerations regarding student-teacher ratio, and use of synchronous and asynchronous instruction.

2.2 The school or program has equity-oriented operational plans for responsive monitoring and support for student learning, belonging, and well-being.

4.1 The school or program has clear systems and methods of communication based on the program model that informs students and families of the following:

4.1a expectations of students and families based on the program model;

4.1b strategies to support the educational experience of students specific to the program model;

4.1c learning progress, levels of proficiency, and grades;

4.1d student well-being ;

4.1e training opportunities and technical support specific to the program model, curriculum, and communications format.

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The standards center the learning experience of students in remote schools and programs.

Examples from Draft Standards

2.1 The school or program provides access to comprehensive counseling.

2.4 The school or program provides opportunities to develop authentic and meaningful connections with peers and adults, both within and outside of the school community.

2.6 The school or program values students' funds of knowledge and creates an affirming learning environment that promotes students' sense of agency and purpose.

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The standards highlight the importance of teaching, learning, and assessment specific to a remote learning environment.

Examples from Draft Standards

3.2 The school or program has instructional practices and assessments designed for purposeful online and/or remote pedagogies that support all students with particular attention to students who are historically and systemically marginalized.

3.7 The school or program has strategic and sustained professional learning opportunities and teacher evaluation based on established professional standards for online and/or remote pedagogies. 453

3.9 The school or program has training for staff, students, and families on digital civics and digital citizenship which includes internet safety, student data privacy, and cybersecurity.

The standards respond to the SOS Audit and engagement feedback regarding the need to create consistent accountability structures.

Examples from Draft Standards
1.1 The school or program has a governance and organizational structure that supports equitable access and outcomes for all students.
1.3 The school or program uses an equity lens when engaging in planning and continuous improvement aligned for student success.
5.1 The school or program has a robust and highly collaborative process of review that is aligned to state requirements for instructional materials adoption.

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The standards provide equitable pathways to a well-rounded education for all students.

Examples from Draft Standards

6.2 The school or program has well-rounded learning opportunities including, but not limited to, STEM, STEAM, the Arts, extracurricular activities, physical education, field trips, dual credit opportunities, and clubs.

6.3 The school or program provides college and career readiness pathways, opportunities for career technical education (CTE) and support for post-secondary success.

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Next Steps



Image by Alulia Baca on [unsplash](#)

- Continued engagement and development of the standards, implementation, and supporting resources
- State Board review and adoption
- Phased-in approach to implementation



Questions & Discussion

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Oregon State Board of Education

Update

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March 17, 2022

Today...

- Legislative Update
- COVID-19 Updates

459

2022 Legislative Session- Policy Bills ODE Supported

- ✔ **HB 4026** - *provided grants to wildfire impacted school districts*
- ✔ **HB 4031** - *Added ODE to the Educator Equity Act, gives ODE the goal of having it's hiring match the demographics of the students we serve*
- **HB 4091** - *Pacific Islander/ Native Hawaiian Student Success Plan*
(Moved to budget bill HB 5202)
- ✘ **HB 4099** - *Racial Justice Youth Collaborative*

2022 Legislative Session- Budget Bill

HB 5202

- Procurement Positions
- EAC Positions
- REN Grants
- Summer Learning
- Pacific Islander/ Native Hawaiian Student Success Plan (moved from HB 4091)
- Technical Adjustments

Spotlight on other Education Policy Bills

- ✔ **HB 4005** - Extends date for transitions of ELD to DELC
- ✔ **HB 4030** - Educator Workforce Bill
- ✔ **HB 4124** - Survey of Assessments
- ✔ **SB 1521** - Superintendents Protection Bill
- ✔ **SB 1522**- Education Omnibus Bill
- ✔ **SB 1583** - Minimizing Assessments

Implementation

Bill Passes Out of the Legislature

Once bills have been signed by the Governor ODE begins working on an implementation plan.

Bill is Assigned to Staff

The Government Relations Team hands off the bill (or bill section) to staff experts

Bill is implemented

- Rulemaking
- Engagement
- Hiring
- Grants
- Contracting

463



OR, CA, WA Governors' Announcement

464

Governors Announced lifting Mask Requirements

With declining case rates and hospitalizations across the West, California, Oregon, and Washington are moving together to update their masking guidance. After 11:59 p.m. on March 11, California, Oregon, and Washington will be adopting new indoor mask policies and moving from mask requirements to mask recommendations in schools.

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- State policies do not change federal requirements, which still include masks on public transit.
- Effective February 25 (OAR will continue through March 11), CDC does not require wearing of masks on buses or vans operated by public or private school systems, including early care and education/child care programs.



RSSL Resiliency Framework

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Key Framework Updates

- Local decision making on face covering requirements in schools *and* on buses
- Isolation Updates
- Pausing Quarantine and Contact Tracing
- Diagnostic Testing for students and staff; offering an enhanced exposure test to stay protocol
- Screening Testing for unvaccinated students and staff removing reporting for case investigation or contract tracing

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Key Framework Updates

- Strong recommendations to:
 - Retrain staff to ensure that health and safety protocols are reviewed and strengthened.
 - Continue immediate notification to parents and families about COVID-19 cases within the classroom/school.⁴⁶⁸
 - Offer families centralized support through the [Positive COVID Test website](#) and COVID-19 Case Support Hotline (866-917-8881).
 - Provide a safe and respectful environment for students and staff who choose to continue to wear a mask.

Definitions

- **Isolation** separates people who have a contagious disease from people who are not sick.
- **Quarantine** separates and restricts the movement of people who were exposed to a contagious disease and could become infectious themselves to limit further spread of the disease.

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Pausing Quarantine and Contact Tracing

Effective March 12, 2022, Oregon will pause contact tracing and quarantine for the general population, including K-12 settings.

- The decision to pause contact tracing and quarantine is based in science and acknowledges that these practices now have very limited if any impact on the transmission of COVID-19 in our communities. SARS-CoV-2, the virus that causes COVID-19, has evolved to become one of the most transmissible viruses known. By the time an exposure is identified and contact tracing is performed, transmission has already occurred. 470
- Following the Omicron surge, and for the first time during the COVID-19 pandemic, Oregon will have very high levels of vaccine- and infection-induced immunity. The duration of this immunity is unknown, but is believed to provide protection from reinfection for at least 90 days.
- Schools are strongly encouraged to provide cohort notifications when exposures occur. These notifications allow individuals and families to take additional precautions according to their individual needs.

Isolation

Individuals who had COVID-19 and had symptoms, should isolate for at least 5 days.

- To calculate the 5-day isolation period, day 0 is the first day of symptoms or a positive test result. Day 1 is the first full day after the symptoms developed or a positive test result.
- Isolation may end after 5 full days if the individual is fever-free for 24 hours without the use of fever-reducing medication and other symptoms have improved.
- Individuals should consider wearing a well-fitting mask around others at home and in public for 5 additional days (day 6 through day 10) after the end of the 5-day isolation period.

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Testing Updates

Because quarantine is no longer required in K-12 settings, regardless of vaccination status or implementation of universal masking, test to stay will shift from a form of modified quarantine to enhanced exposure testing.

- Students and staff may continue to attend school regardless of their participation in enhanced exposure testing.
- Testing all exposed individuals in a population with high levels of immunity is neither feasible nor likely to benefit health and safety.
- Schools may offer enhanced exposure testing to individuals at increased risk of severe illness, e.g., cohorts which include medically fragile individuals.
- Schools are strongly encouraged to provide cohort notifications when exposures occur. These notifications allow individuals and families to take additional precautions according to their individual needs.

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Lifting Oregon's Emergency Declaration

On February 24 Governor Kate Brown [announced](#) that she will be lifting Oregon's COVID-19 emergency declaration, effective April 1.

- Safety requirements in place regarding vaccinations for K-12 staff were not established by the emergency declaration. Instead they are covered by state agency administrative rules issued under existing non-emergency state authority. ⁴⁷³
- [HB 4402 \(2020\) Limited Liability](#) related to COVID-19 will likely lift as it applies when the school is operating in compliance with COVID-19 emergency rules.
 - SECTION 6. (1) Sections 1 to 3 of this 2020 third special session Act apply to claims arising during the period in which any declaration of a state of emergency related to COVID-19 and issued by the Governor on March 8, 2020, and any extension of the declaration, is in effect.



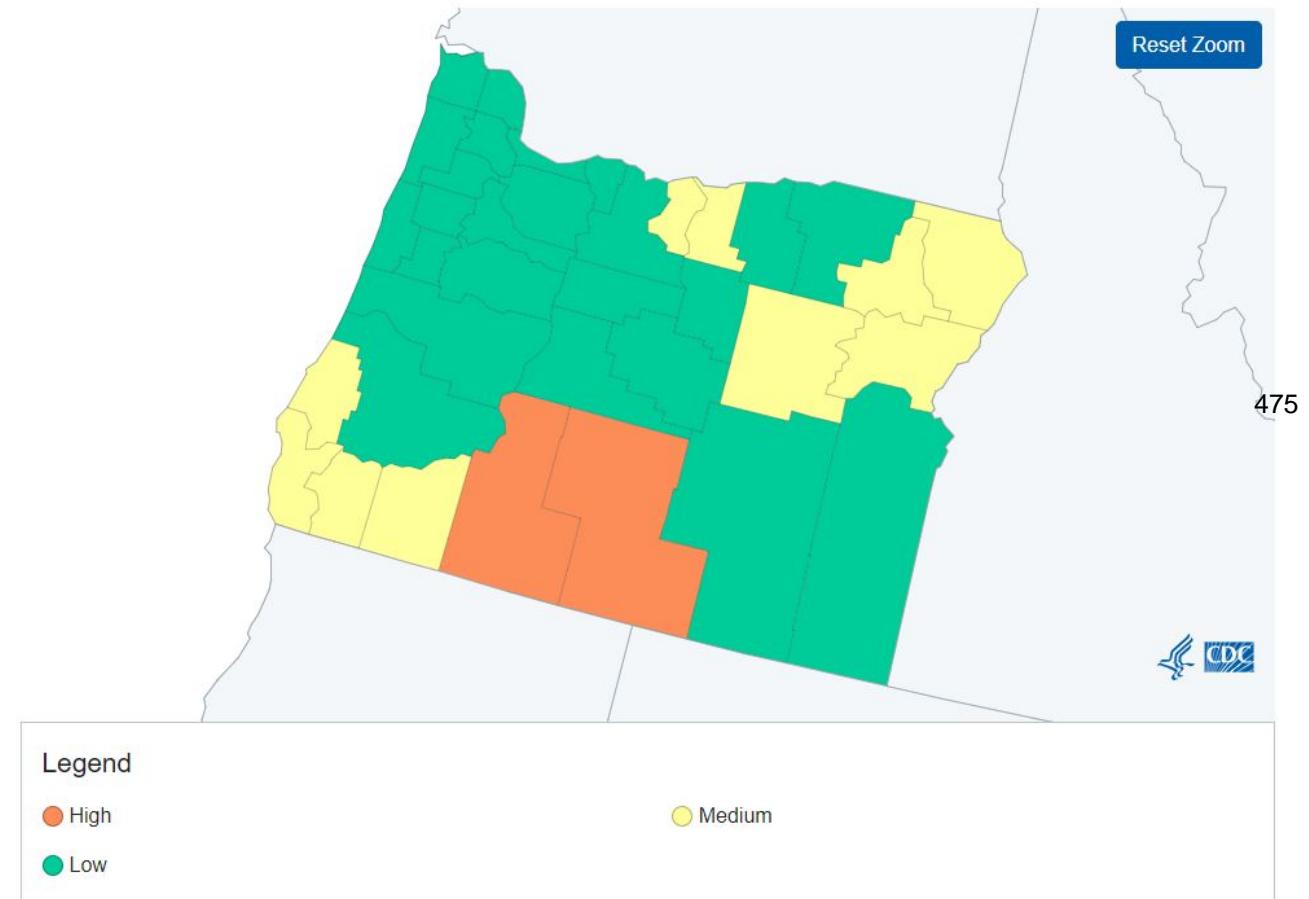
CDC COVID-19 Community Levels ⁴⁷⁴

U.S. COVID-19 Community Levels by County

Local health authorities should consider the area's COVID-19 Community Level and other local conditions and factors when deciding to implement prevention measures.

Maps, charts, and data provided by CDC, updates every Thursday by 8 pm ET

Updated: March 10, 2022



CDC announces COVID-19 Community Levels

COVID-19 Community Levels - Use the Highest Level that Applies to Your Community				
New COVID-19 Cases Per 100,000 people in the past 7 days	Indicators	Low	Medium	High
Fewer than 200	New COVID-19 admissions per 100,000 population (7-day total)	<10.0	10.0-19.9	≥20.0
	Percent of staffed inpatient beds occupied by COVID-19 patients (7-day average)	<10.0%	10.0-14.9%	≥15.0%
200 or more	New COVID-19 admissions per 100,000 population (7-day total)	NA	<10.0	≥10.0
	Percent of staffed inpatient beds occupied by COVID-19 patients (7-day average)	NA	<10.0%	≥10.0%

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CDC announces COVID-19 Community Levels

COVID-19 community level	Individual- and household-level preventive behaviors	Community-level preventive strategies
<p>Low</p>	<ul style="list-style-type: none"> • Stay up to date with COVID-19 vaccines and boosters • Maintain ventilation • Mask based on individual preference, informed by individual risk • Follow recommendations for isolation and quarantine • Seek testing when exposed or symptomatic; isolate promptly if symptomatic or infected • People who are immunocompromised or at <u>high risk for severe disease</u>: <ul style="list-style-type: none"> • Have a plan for rapid testing • Know if a candidate for antivirals/monoclonals 	<ul style="list-style-type: none"> • Plan for distribution and administration of vaccines to achieve high community coverage • Maintain improved ventilation for public indoor spaces • For people who are immunocompromised or at increased risk for severe disease: <ul style="list-style-type: none"> • Increase access to testing

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This chart is abbreviated, for a full version go to: https://www.cdc.gov/coronavirus/2019-ncov/science/community-levels.html#anchor_47145

CDC announces COVID-19 Community Levels

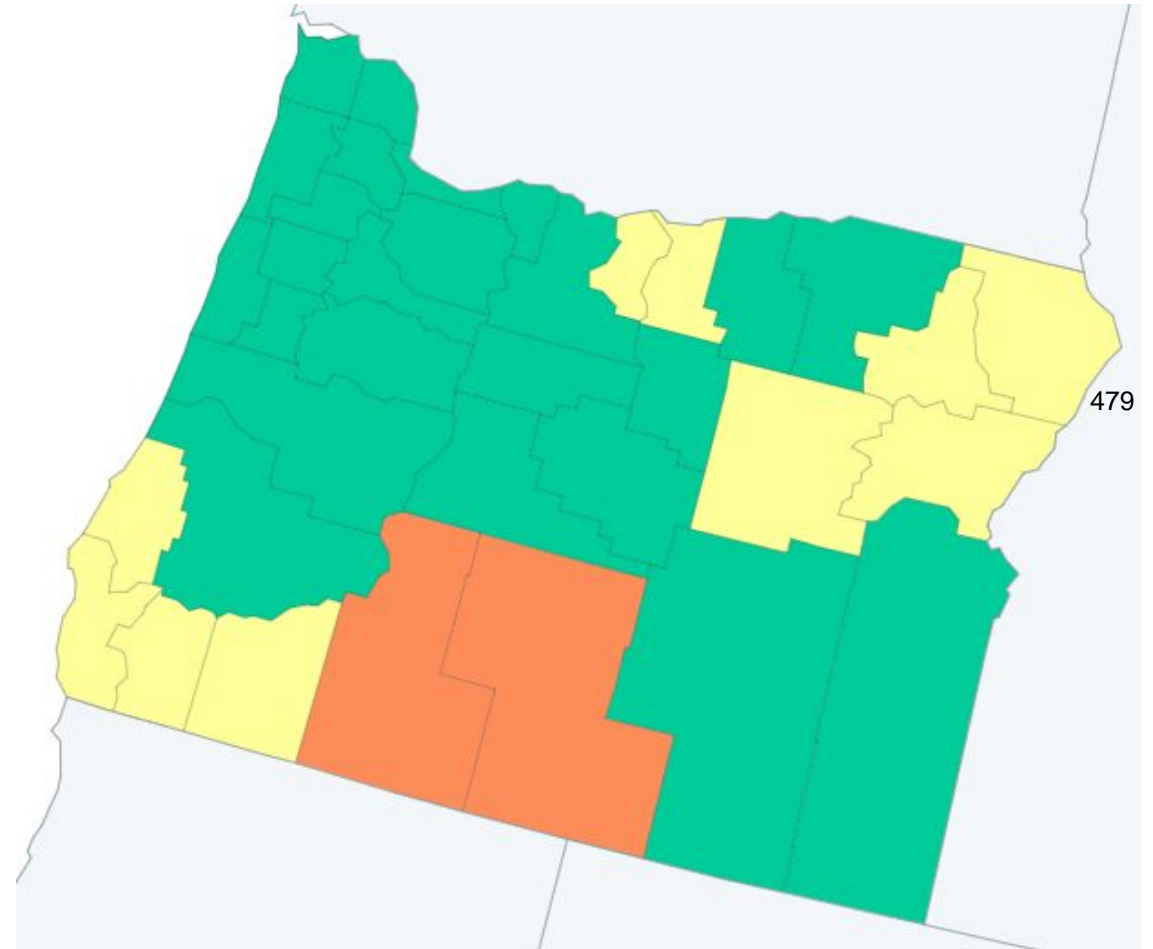
COVID-19 community level	Individual- and household-level preventive behaviors	Community-level preventive strategies
Medium	<ul style="list-style-type: none"> People who are immunocompromised or at <u>high risk</u>: <ul style="list-style-type: none"> May choose to mask indoors in public People with household/social contact with individuals who are immunocompromised or at increased risk may consider self-testing to detect infection before contact and may choose to mask when indoors with them 	<ul style="list-style-type: none"> Protect persons most at risk for severe illness or death by identifying populations at high risk and expanding access to vaccination, testing, treatments, support services, and messaging Consider implementing screening testing in workplaces, schools, or other community settings as appropriate Enhanced prevention measures in high-risk congregate settings
High	<ul style="list-style-type: none"> Wear a mask indoors in public, regardless of vaccination status (including in K-12 schools) People who are immunocompromised or at <u>high risk</u> may consider using masks or respirators that provide greater protection to the wearer People who are immunocompromised or at <u>high risk</u> may choose to avoid indoor public settings where they may be exposed for non-essential activities 	<ul style="list-style-type: none"> Implement universal indoor masking in settings that serve populations at high risk for severe disease (e.g., older adults) Implement healthcare surge support as needed

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This chart is abbreviated, for a full version go to: https://www.cdc.gov/coronavirus/2019-ncov/science/community-levels.html#anchor_47145

CDC COVID-19 Community Levels

Community Level	Mask Recommendation
Low	No recommendation
Medium	If you are immunocompromised or high risk for severe disease, talk to your healthcare provider about whether you need to wear a mask
High	Wear a well-fitting mask indoors in public, regardless of vaccination status (including in K-12 schools and other indoor community settings)





School Health Advisory for March & April

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Advisories for Schools

1. Schools must establish and clearly communicate to students, staff and families their expectations for use of face covering. Depending on [local COVID-19 Community Levels](#), the CDC recommends the continued use masks for those who are or who live with other who are immunocompromised or [high risk](#) for severe disease.
2. Prioritize care, connection and community to support the mental, emotional and social health and well-being of students, families, staff and administrators utilizing [care and connection recommendations](#). 481
3. Reteach to all staff, students and families your school's [layered mitigation safety protocols](#)
4. If students or staff show COVID-19 symptoms they must exclude the individual per [OAR 333-019-0010 \(3\) & \(4\)](#). Schools may offer testing to the individual through OHA's Diagnostic Testing Program.

Advisories for Individuals

1. Center grace and patience through this transition supporting the mental, emotional and social health and well-being of your child. Depending on [local COVID-19 Community Levels](#), the CDC recommends the continued use masks for those who are or who live with other who are immunocompromised or [high risk](#) for severe disease.
2. If your child has COVID-19 symptoms, do not send them to school. Seek a COVID-19 test. COVID-19 symptoms can be found on page 9 of the [Planning for COVID-19 Scenarios in Schools A Toolkit for School Leaders and Local Public Health Authorities](#).
3. Eligible students ages 5 and up should get vaccinated and boosted now if they're not.
 - a. Vaccination remains the best protection against serious illness from COVID-19 and reduces spread of the disease.
[Get Vaccinated Oregon](#).

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Questions?

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