



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
Public Service Building 251 A/B
255 Capitol Street NE
Salem, OR 97310
Thursday, October 16, 2025

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: 10:30 AM
 - B. **Board Member Reports**
Time: 10:35 AM
 - C. **Director's Report** **3**
Time: 10:55 AM
- 2. **Public Comment**
Time: 11:25 AM
 - A. The State Board of Education will hold space for **virtual** public comment. 28
Individuals must register to provide virtual comment. Written public comment received will be posted to BoardBook.
- 3. **Consent Agenda**
Time: 11:40 AM
 - A. Pupil Transportation Rule Updates 2025 41
 - B. Menstrual Dignity for Students Reimbursement Program Process Improvements: 102
OAR 581-021-0596 and OAR 581-021-0590
 - C. Instructional Materials Adoption: Social Science 115
- 4. **Adoptions**
 - A. House Bill 2007 (2025) Implementation: State Summer Learning Grant Program 133
New Rules
Time 11:45 AM
Raquel Gwynn, Office of Teaching, Learning, and Assessment and Savannah Solario, Office of Finance and Information Technology
- 5. **Break for Lunch**
Time: 12:00 PM
- 6. **First Readings**



A. Senate Bill 141 (2025) Implementation: Strengthening and Expanding Instructional Materials	159
<i>Time: 1:00 PM</i>	
Sasha Grenier, Vanessa Martinez, and Alexa Pearson, Office of Teaching, Learning, and Assessment	
B. Postponement of High-quality Instructional Materials (HQIM) Adoption for World Languages and The Arts	190
<i>Time: 1:20 PM</i>	
Deirdre Banning, Vanessa Martinez, and Alexa Pearson, Office of Teaching, Learning, and Assessment	
C. Senate Bill 141 (2025) Implementation: Interim Tests	215
<i>Time: 1:35 PM</i>	
Dan Farley and Andrea Lockard, Office of Research, Assessment, Data, Accountability, and Reporting	
D. Program Budgeting and Accounting Manual (PBAM) Updates	233
<i>Time: 2:00 PM</i>	
Devyn Castillo and Hannah Sullivan, Office of Teaching, Learning, and Assessment	
E. House Bill 3007 (2025) Implementation: Accommodations for Students with Brain Injuries: OAR 581-021-3007	390
<i>Time: 2:20 PM</i>	
Ely Sanders, Office of Enhancing Student Opportunities	
F. Surrogate Parents and Transfer of Procedural Rights at Age of Majority: OAR 581-015-2320 and OAR 581-015-2325	434
<i>Written Report Only</i>	

7. Adjourn

Time: 2:35 PM



ODE Director's Report

October 16, 2025

Dr. Charlene Williams, ODE Director

3

Acknowledging our Context

Multiple fiscal and policy shifts happening at once

- Federal Shutdown
- HR 1
- Gov. Kotek Spending Slowdown
- Legislative Financial Office - Reductions Request

4

Acknowledging Stacking Impacts

- Each of these is a distinct process with its own rules, timelines, and impacts and they do not happen in isolation.
- Together they create a cumulative sense of pressure and impact for schools, staff, and partners.
- We are working to keep them as clear and separate as possible in how we plan and communicate
- We also want to acknowledge the broader context and the way they layer on top of each other.

2



Celebrations!!



Teacher of the Year!



Congrats to the
- 2025-26 -
Teacher of the Year

Sally Golden

Sally teaches special education at the Community Transition Program in Springfield where her leadership and connection shine both inside and outside the classroom.

7

[READ MORE](#)





Superintendent of the Year!

8

Congratulations



George Mendoza

La Grande School District Superintendent

2026 OASE Superintendent of the Year



Indigenous Peoples' Day and Installation of Tribal Flags

10



OCT. 13

INDIGENOUS
PEOPLES
DAY




Office of Oregon Governor
TINA KOTEK





Honoring Hispanic Heritage Month

12



**NATIONAL
HISPANIC
HERITAGE MONTH**

September 15 to October 15

National School Lunch Week





All-Staff Meeting

Welcome Oregon Department of Education Staff
October 1, 2025



ODE's Three Strategic Pillars

Academic Excellence



Belonging & Wellness



Accountability





Pillar

Academic Excellence



Working Definition:

Our scholars deserve to learn at high levels so they have the skills and knowledge to do their best work.

Academic Excellence.

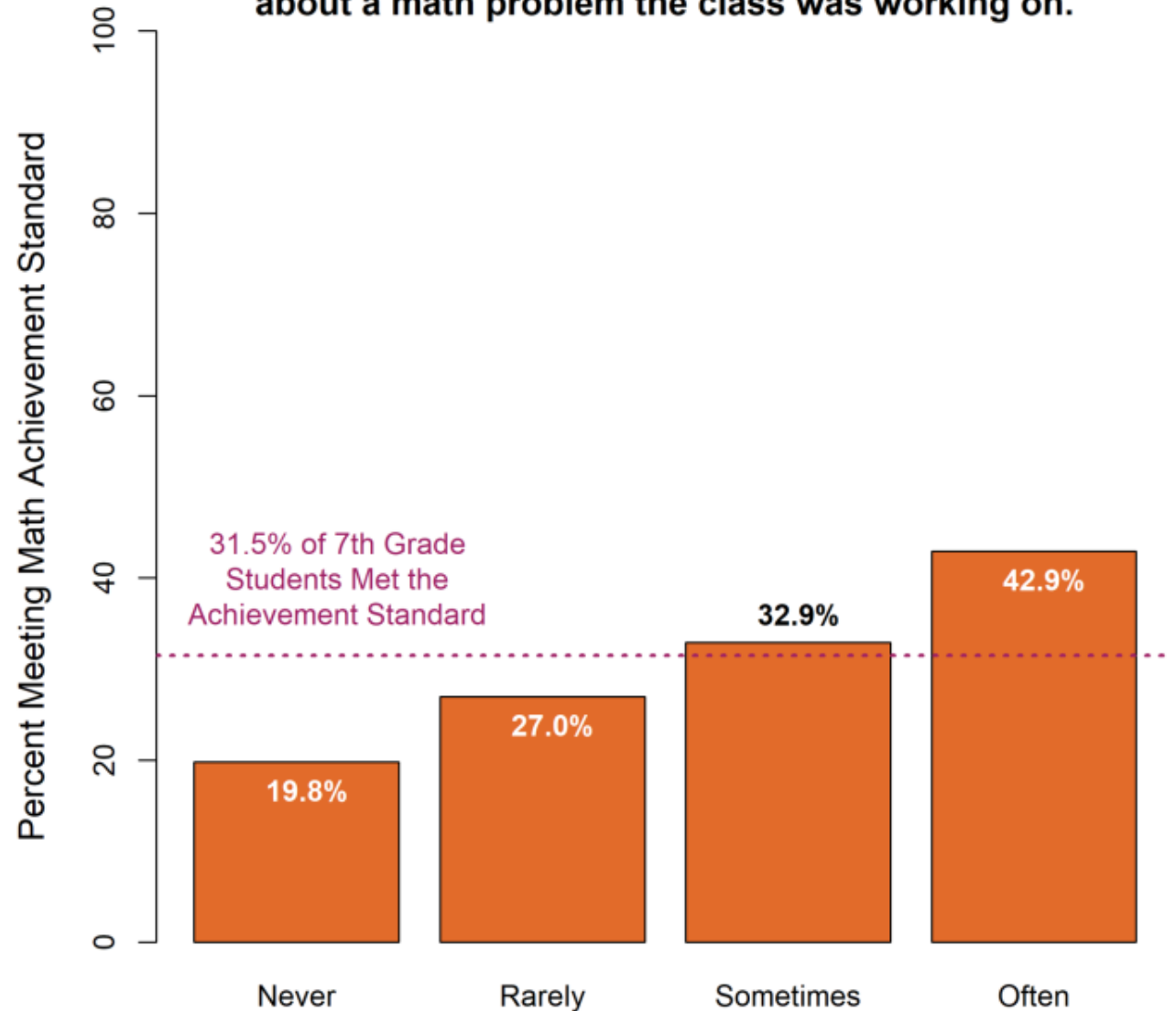




7th Grade Math

Students who have more opportunities to engage in math discussions are more likely to be proficient.

Think about what you did in your math class this year. How often did you do the following? Talk with the whole class about a math problem the class was working on.

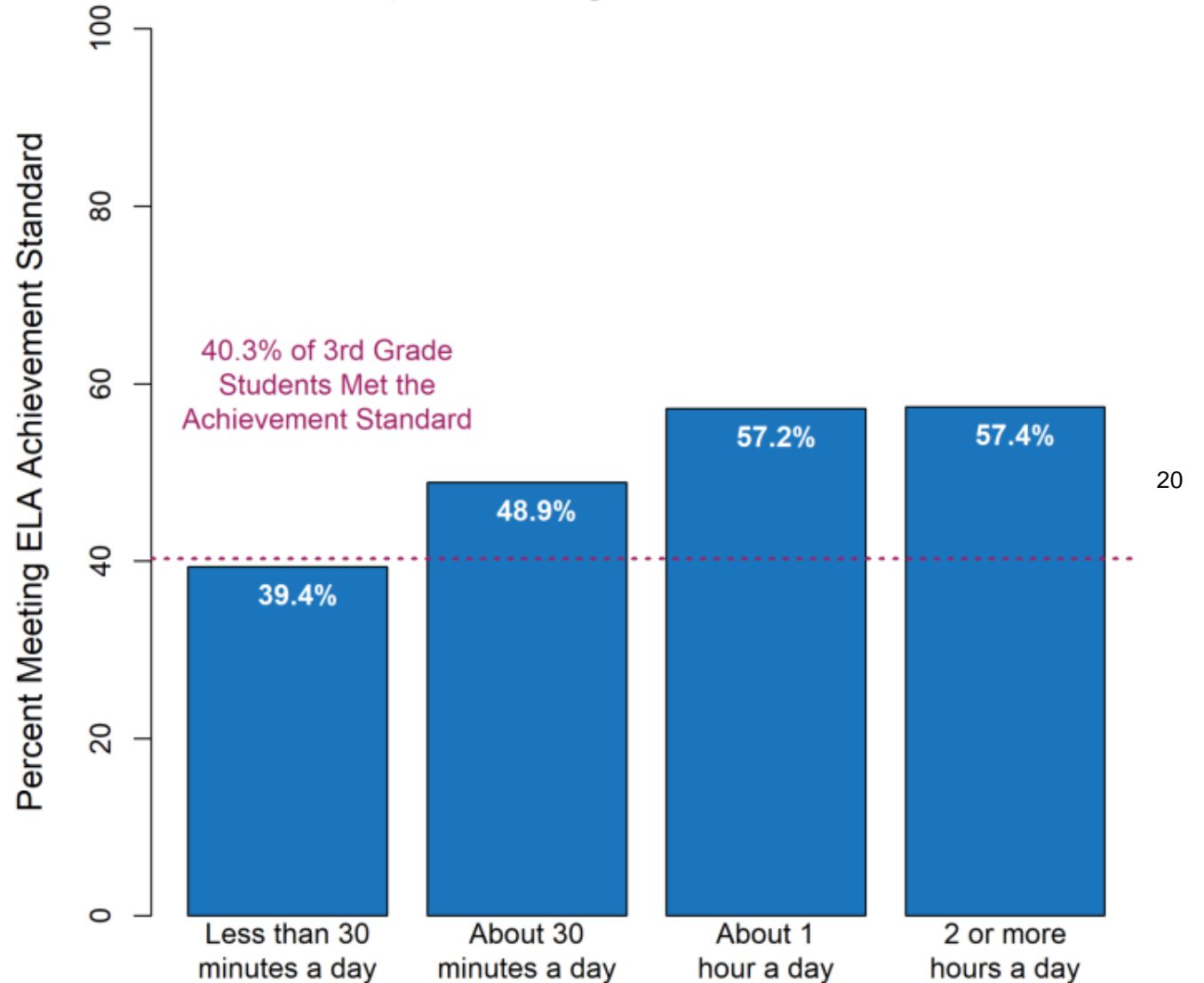




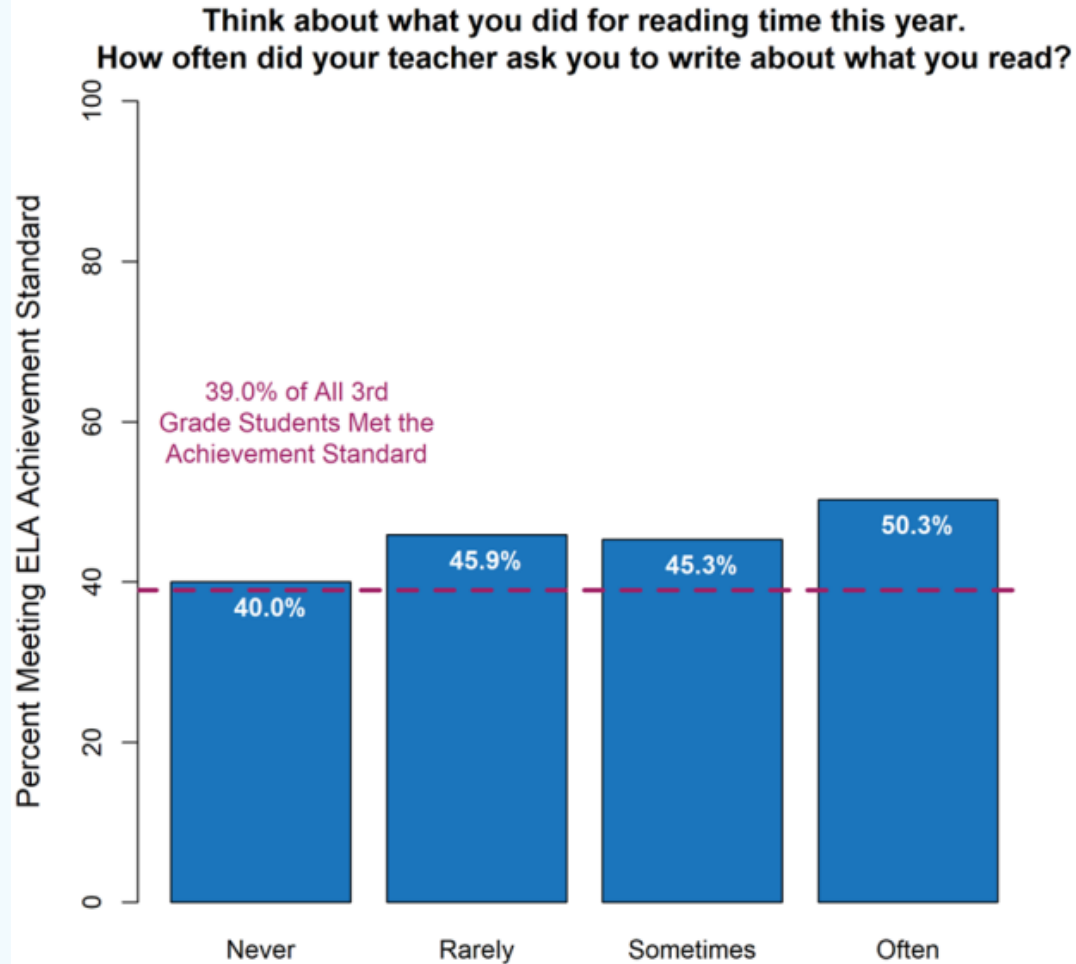
3rd Grade ELA

Students who read 30 or more minutes a day outside of school are more likely to be proficient.

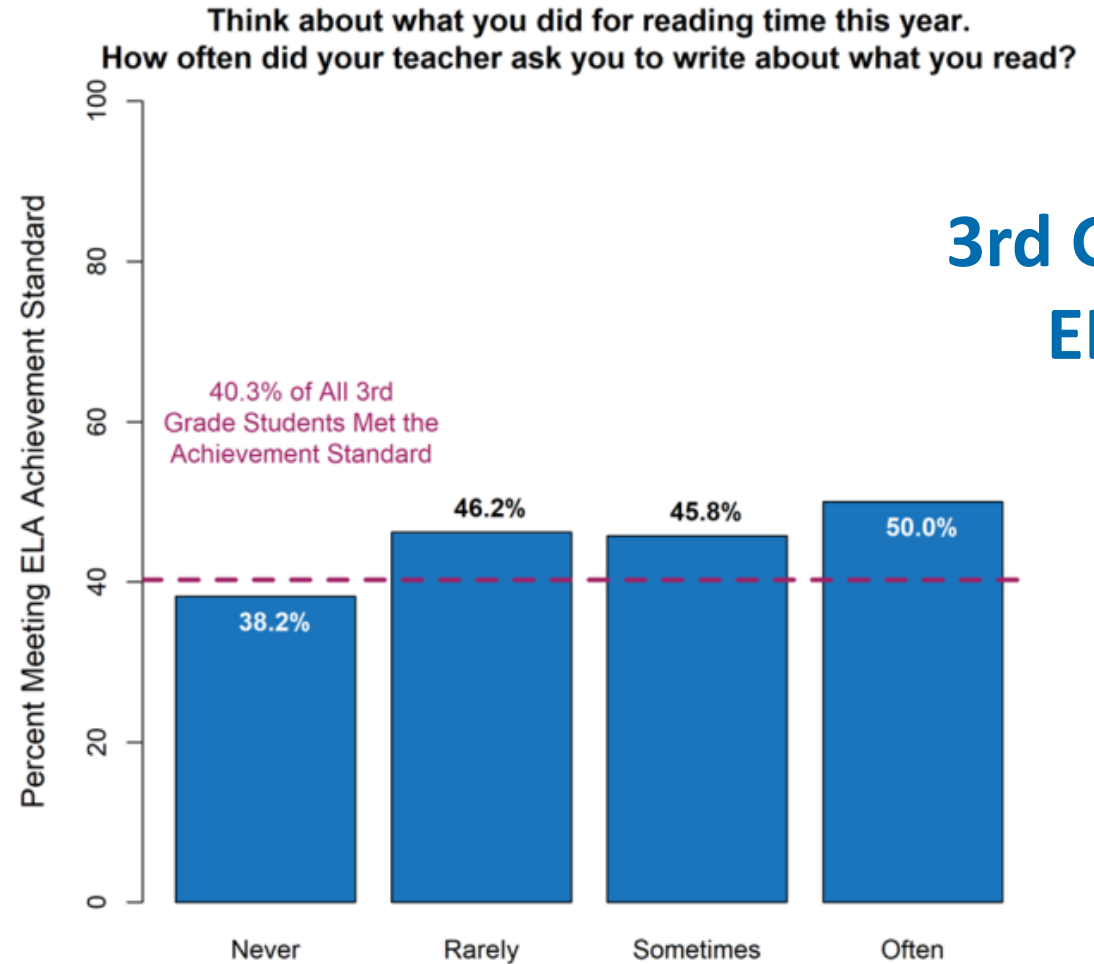
Besides doing homework, how much time do you spend reading outside of school?



Students who have more opportunities to write about what they read are more likely to be proficient.



Source:
2023-24 Student Educational Equity Development (SEED) Survey. N = 21,469 students.



Source:
2024-25 Student Educational Equity Development (SEED) Survey. N = 23,444 students.

3rd Grade
ELA



Strategic Planning

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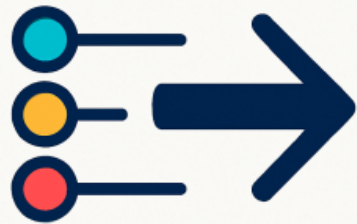
From Many Layers to One Strategic Plan



- Agency Mission, Vision, and Values
- Three Pillars:
 1. Academic Excellence
 2. Belonging & Wellness
 3. Accountability
- Statewide Longitudinal Performance Growth Targets
- ODE's Equity Strategic Plan
- Five Priorities for Student Success
 1. High-quality learning experiences
 2. Aligned & coherent systems
 3. Engaged communities
 4. Safe & inclusive schools
 5. Committed & supported staff
- Program Plans & Strategies: STEM Plan; Student Success Plans; CTE plan, etc.

Four Steps to ODE's New Strategic Plan

STRATEGIC ALIGNMENT
(NOT NEW GOALS)



Step 1: Organize & visualize agency priorities, objectives, and goals

Step 2: Build shared understanding around agency priorities, objectives, and goals (*external and internal*)

Step 3: Develop ODE Strategic Plan* focused on tangible, concrete outcomes and actionable steps

Step 4: Develop Implementation & Monitoring plan

*Aligned to Gov Kotek's expectations for all agencies

Getting it done

WestEd  *Thriving Learners, Empowered Communities*

 education
northwest

WestEd & EdNW will facilitate this process.

Key Milestones:

- Visual Crosswalk of priorities, objectives, and goals— **October 2025**
- Kick-Off – **October 2025**
- Strategic Alignment Sessions – **Sept - Dec 2025**
- Final Strategic Plan – **December 2025**
- Implementation Plan – **Feb 2026**



HOPE

Thank You!



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From: [Laura Arthur](#)
To: [StateBoard Public Email](#)
Subject: Public Comment: 6.B. Postponement of High-quality Instructional Materials (HQIM) Adoption for World Languages and The Arts
Date: Friday, October 10, 2025 9:47:53 AM

You don't often get email from publicpolicy@oregonmea.org. [Learn why this is important](#)

[*** This message was sent from outside the organization. Treat attachments, links and requests with caution. Be conscious of the information you share if you respond. ***]

Good morning members of the Board,

I'm writing to express deep concern about the recent elimination of the Arts Education Specialist position at the Oregon Department of Education due to the end of grant funding. This role has been essential in ensuring equitable, high-quality access to music, visual art, dance, and theatre education for Oregon students. Without them, Oregon becomes one of the few states without statewide arts education leadership.

We would never imagine eliminating specialists in subject areas like math, science, or literacy simply because a grant expired. Arts education deserves that same level of respect and structural support. The arts are part of Oregon's adopted standards, and they are fundamental to a well-rounded education under federal law. If we fail to provide statewide leadership in the arts, we are sending the message that these subjects — and the students who thrive in them — are less important.

The absence of arts education specialists creates an equity gap. Students in well-resourced districts may still have access to robust programs, but in rural and underfunded communities — often serving our most marginalized populations — the arts will continue to erode without statewide coordination, training, and advocacy. This widens opportunity gaps and undermines Oregon's commitment to equity.

Arts education is not a luxury. It is a proven driver of student engagement, belonging, creativity, and even academic achievement in other subjects. For many students, the arts are the reason they come to school each day. Eliminating leadership in this area risks leaving those students behind.

I urge the Board to recognize arts education as essential to every child's learning and to prioritize the **restoration of permanent, state-funded arts education specialists at ODE**. If Oregon truly values equity, we cannot relegate the arts to grant-funded extras while ensuring stable infrastructure for other disciplines. Every student, regardless of zip code, race, or income, deserves access to high-quality arts learning supported by state leadership.

Thank you for your time and for your commitment to Oregon's students.

I am looking forward to attending the Board of Education meeting on October 18th. I would welcome and appreciate any opportunity to provide additional comment or context around this topic. I can be reached at publicpolicy@oregonmea.org or at 541-513-7414.

Sincerely,

Laura Arthur



Laura Arthur

Public Policy Chair
Oregon Music Education Association
oregonmea.org

From: [REDACTED]
To: [StateBoard Public Email](#)
Subject: Re:
Date: Saturday, October 4, 2025 5:20:08 PM

You don't often get email from [REDACTED]. [Learn why this is important](#)

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Ladies and gentlemen

I have some safety concerns about the transportation of students who ride a bus to school. I feel it is important that we look at a mandatory age limit for any driver who transport children to and from school. It is my opinion that there should be limit of no more than 75 years of age. Commercial airline pilots are restricted to the age 65 because of the cognitive decline in humans over that age. With the continued increase in school bus accidents across the country I feel age and training play a significant roll. We can always improve training but there is nothing we can do drivers getting older. I understand there is a shortage of school bus drivers across the country but safety must be our number one priority.

I am a school bus driver and these thoughts and concerns are that of my own and they do not reflect or represent any school districts or private companies. If possible, I would like to attend an upcoming board of education meeting so I can follow up with any questions or comments.

Sincerely
Paul Kalista

On Thu, Sep 18, 2025, 09:52 StateBoard Public Email
<StateBoard.PublicEmail@ode.oregon.gov> wrote:

Hi Paul,

Thank you for reaching out and providing public comments to the Oregon State Board of Education. I have uploaded your comments to [BoardBook](#) and made it available to both the members of the Board and the greater public. It will be made part of the official record of their September 18th meeting.

-Corey



OREGON
DEPARTMENT OF
EDUCATION

Oregon achieves . . . together!

Corey Rosenberg

(he, him, his – [why pronouns matter](#))

State Board of Education Administrator

Oregon Department of Education

From: Paul Kalista <[REDACTED]>
Sent: Wednesday, September 17, 2025 6:06 PM
To: StateBoard Public Email <StateBoard.PublicEmail@ode.oregon.gov>
Subject:

You don't often get email from [REDACTED]. [Learn why this is important](#)

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Ladies and gentlemen

I would like to address part of the trouble we are having when our public school buses are making a stop to pick-up children and people are running through the red stop lights on the bus. As a bus driver, I have seen this happen multiple times.

I would like to present you with my suggestions of having better and more lights on the bus. For example, when the yellow or amber warning lights on the top of the bus are engaged, also have the emergency flashers engaged at the same time as to have all amber light flashing as the warning to all others that the bus is about to stop. Then as soon as the doors open and the red stop lights on top of the bus are engaged there should be more red lights lower on the bus that also flash as a strobe. These red flashing lights can be on the front and back of the bus located in the bumper. More side marker lights that can flash amber and red respectfully.

School bus lighting has not been updated for the past 50 years or more and we need to make are school buses more visible. This I feel is a must to bring our school bus safety up to date.

I believe these updates can be achieved by programing current bus computers. There will of course be some additional costs to install new lights but I believe the cost is minimal compared to having more people running the red lights and putting more children's lives in

danger.

This option is my own and does not reflect on any school districts or private companies. Thank you for any consideration you may take on this matter and I look forward to hearing from you. I also look forward to meeting with you if you decide to take action with this suggestion.

Sincerely

Paul Kalista



Date: October 15, 2025

To: Oregon State Board of Education

From: Dr. Krista Parent, Coalition of Oregon School Administrators (COASA)
Sam Breyer, Oregon Association of Education Service Districts (OAESD)
Jackie Olsen, Oregon Association of School Business Officials (OASBO)
Emielle Nischik, Oregon School Boards Association (OSBA)

Subject: Public Comment on the First Reading of SB 141 Education Accountability Rules

- Agenda Item 6A. Strengthening and Expanding Instructional Materials
- Agenda Item 6C. Interim Tests

Dear Chair Scurlock, Vice Chair Montgomery, Second Vice Chair Richardson, and Members of the State Board of Education:

On behalf of the Coalition of Oregon School Administrators, Oregon Association of Education Service Districts, Oregon Association of School Business Officials, and Oregon School Boards Association, we submit this letter to provide public comment on the first reading of the draft rules relating to:

- Agenda Item 6A. Strengthening and Expanding Instructional Materials; and
- Agenda Item 6C. Interim Tests

Our members lead 197 school districts and 19 education service districts that serve over half a million students in Oregon – we recognize the weight of the roles and responsibilities our members hold to ensure the success of each and every student in Oregon, regardless of zip code.

Accountability is critical. We are all committed to seeing our students reach their full potential and thrive. As education leaders, we are all in for shared accountability for the right things, and with meaningful and effective support in place.

Our members and organizations have engaged in the Accountability Advisory Committee (HB 2656), in the development of the Education Accountability Act of 2025 (SB 141), and now in the rulemaking process.

Agenda Item 6A. Strengthening and Expanding Instructional Materials

We support the current draft of the proposed rules relating to strengthening and expanding instructional materials. As required by SB 141, these rules remove the publisher fee system associated with reviewing and evaluating instructional materials.

Eliminating the publisher fee system is long overdue; in doing so, Oregon is taking important steps forward in 1) reducing “pay-to-play” barriers, especially for smaller publishers; 2) expanding

the state list of instructional materials reviewed and evaluated; and 3) helping advance efforts to ensure that there are more state-approved instructional materials that can meet the needs of students who are emerging multilingual learners and students with disabilities.

Our hope is that these efforts will continue to support districts in accessing more affordable high-quality instructional materials that meet the needs of students across Oregon.

Agenda Item 6A. Implementation Considerations and Feedback:

- High-Quality Instructional Materials as part of ODE’s Continuum of Supports. How is ODE preparing to support the implementation of high-quality instructional materials as a core part of their continuum of supports ahead of the 2026-27 school year? What guidance, technical assistance, regional support, and professional learning will be provided across the state?
- Instructional Materials Adoption Cycle and District/ESD Budget Process. Given the current adoption cycle to update instructional materials, how will ODE and the Review Committees plan to evaluate a larger volume of instructional materials in a timely manner so that the adoption cycle is in alignment with district/ESD budgeting processes? Local education agencies need support in planning and budgeting for high-quality instructional materials.
- Costs. Given the costs of high-quality instructional materials, how might ODE be able to support efforts to reduce cost barriers (for example: Open Educational Resources, Instructional Materials Caravan, state-negotiated rate to lower the costs, etc) so that students across Oregon have access to high-quality instructional materials?

Agenda Item 6C. Interim Tests

We support the current draft of the proposed rules relating to interim tests. These rules are in alignment with SB 141, and include a clause where ODE will engage education and community partners in developing guidance for interim test administration windows and reporting.

Throughout the education accountability conversations, our organizations advocated for the inclusion of interim tests, especially given the dynamics of Oregon’s opt out law and our summative tests. We value interim tests because we can track student growth throughout the year. These tests give us actionable data to inform our improvement efforts.

In addition to developing this rule, ODE is organizing an Interim Test Selection Process which will inform which interim tests the State Board of Education adopts on the state-approved list. In SB 141, no more than four interim tests shall be adopted by the State Board.

Agenda Item 6C. Implementation Considerations and Feedback:

- Interim Test Selection Process, Budget Process, and Implementation Timeline. In reviewing the interim test options using the technical and Oregon-specific criteria, we strongly recommend that the review committee and State Board consider which interim



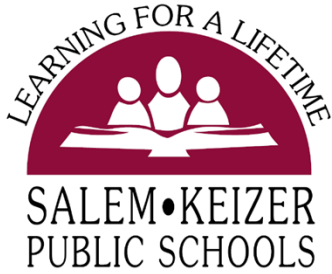
tests are currently being administered across the majority of school districts and public charter schools in K-8 Language Arts and Math.

This information and data will be important to understand before adopting a final list of four, especially given the short turnaround districts would have to purchase, adopt, and implement (training, professional development, and technology, etc) new interim tests if they currently do not use interim tests that the State Board approves no later than January 31, 2026.

- Guidance on Interim Test Administration Window and Reporting Requirements. As ODE develops guidance on the test administration window and reporting, please ensure that a representative sample of school districts and public charter schools are involved in the development of ODE’s guidance (include geographic diversity, input from small, medium, and large school districts and public charter schools, take into consideration the key implementers at different levels that need to be involved (classroom, school, district, regional level, for example).
- Costs. The Legislature has not provided state funding for school districts or public charter schools who may need to adopt new interim tests – and given our current economic and revenue outlook – it is unlikely that funding would be earmarked in a future legislative session. Given the costs of purchasing and implementing new interim tests, how might ODE be able to support efforts to reduce cost barriers (for example: Interim Tests Caravan, state-negotiated rate to lower the costs, etc) so that school districts and public charter schools across Oregon have access to state-approved interim tests?

We look forward to our continued work together to implement the 2025 Education Accountability Act with clear goals and meaningful support systems in place so that districts and ESDs can continue to do their best work in supporting the success of each and every student in Oregon.

Thank you for taking the time to review our letter, and for your continued service.



T.J. CROCKETT, Director
Transportation Services
P.O. Box 12024 • Salem, Oregon 97309-0024
503-399-3100 • FAX: 503-399-3082

Andrea Castañeda, Superintendent

October 13, 2025

ODE Rules Coordinator
Oregon Department of Education
255 Capitol Street NE
Salem, OR 97310

State Board of Education
Oregon Department of Education
255 Capitol Street NE
Salem, OR 97310

Dear ODE Rules Coordinator and Members of the State Board of Education:

I am writing to provide formal feedback regarding the proposed administrative rules currently under consideration. I appreciate the opportunity to submit public comments to both the ODE Rules Coordinator and the State Board of Education, and I wish to ensure that my perspectives are considered as part of the official record.

While the proposed rules are listed as "technical fixes," I believe that some of these changes introduce significant impacts that warrant careful consideration. Below, I have outlined my specific feedback on the relevant OARs:

OAR 581-053-0050

The proposed change in Section (1) would require applicants who have held a driver license in another state during the preceding three years to provide a *court-certified driving record* from each state or other jurisdiction where the license was held.

While the intent to verify driving history is reasonable, the current language presents several practical challenges. First, the rule adds "other jurisdictions" as possible sources for driving records but does not clearly state that holding a license in one of those non-state jurisdictions would trigger the requirement. Clarification would improve consistency and interpretation.

Second, obtaining records from multiple states or jurisdictions within a 30-day window may not be feasible. Processing times vary widely, and in some cases the record would be static—for example, when an applicant has not held a license in that state for several years. This creates both time and cost burdens, particularly for new applicants.

Finally, the requirement for a "court-certified" driving record may not be realistic in every jurisdiction. Not all states or territories use that terminology, and some may not produce an equivalent document. A more practical standard might be to require a *driving record equivalent to an Oregon court-certified driving record*, allowing flexibility while maintaining intent.

Providing this clarification and flexibility would support consistent implementation without creating unnecessary barriers for qualified applicants.

OAR 581-053-0240, Section (17)

The proposed change in Section (17) would require a crossing arm to be installed on all school buses manufactured on or after January 1, 2026. This timeline is unrealistic and creates an unplanned financial burden for districts. Bus purchases typically involve lead times of six to nine months, meaning many vehicles already on order—placed under current specifications—will fall into the compliance gap between rule adoption and the 10-week implementation window. Districts will be forced to absorb additional costs to retrofit or reorder buses that were planned and budgeted in good faith.

While this change aligns with recent National Congress on School Transportation standards, its safety benefit appears limited. The Kansas State Department of Education’s national survey of school bus loading and unloading fatalities consistently shows that more students are struck by the side of the bus than by the front, suggesting crossing arms address only a portion of the overall risk. In Salem-Keizer, approximately 52 percent of routes transport students with special needs who do not cross in front of the bus, further limiting the practical benefit of this requirement.

If Oregon intends to align with national standards, that is understandable; however, implementing this change with such short notice unfairly penalizes districts. A longer lead time or delayed effective date would allow compliance without imposing unnecessary fiscal impacts.

OAR 581-053-0240, Section (34)

The proposed addition in Section (34)(k) would require that all school buses manufactured after January 1, 2026, and used to transport students with special needs, be built with both heat and air conditioning systems.

This requirement presents several concerns. First, the implementation timeline mirrors that of the new crossing-arm mandate and provides inadequate lead time. Districts typically experience six- to nine-month bus procurement cycles, and the rule’s effective date leaves only a brief window for compliance after adoption, creating additional unplanned costs for buses already on order.

Second, this provision extends beyond what is appropriate for a *minimum standard for bus construction* and instead establishes an *operational requirement*. Districts may not know at the time of purchase whether a particular bus will later be assigned to transport a student with special needs. If a bus is ordered without air conditioning, this rule could effectively prohibit its use for that purpose, even when it would otherwise meet the student’s needs and comply with law.

Finally, the term “student with special needs” is undefined in rule. If the intent is to reference students with Individualized Education Programs (IEPs), that group frequently rides general education buses—sometimes because such placement represents the least restrictive environment under federal law, or simply because specialized transportation is not required in their IEP. As written, this language could functionally require *all* new school buses to have air conditioning, which likely exceeds the intended scope. The operational goal of ensuring that students with special needs are transported in air-conditioned vehicles should instead be addressed through an operational or service-delivery rule, or the reference to an undefined student group should be removed if the intent is to require all buses to include air conditioning.

OAR 581-053-0240, Section (36)

The proposed language in Section (36)(g)(F) is confusing because it describes optional identification that *may* be added to a bus, yet requires that the International Symbol of Accessibility *shall* be displayed. As written, these statements conflict: a bus cannot be both optionally and mandatorily identified in the same provision. The rule could be clarified to specify that ~~if~~ a district elects to display such identification, the symbol *shall* conform to the stated specifications.

In addition, there is no implementation date identified for this change. Without one, signage already installed on existing buses could be considered noncompliant immediately upon adoption, even though those buses were built or marked under prior standards.

Finally, the rule again references “students with special needs” without defining the term. In practice, this symbol is typically used to identify buses equipped with wheelchair lifts, not buses assigned based on the presence of an IEP. Some riders may have Section 504 plans rather than IEPs, further blurring the definition. Clarifying both the intent and terminology would help ensure the rule is applied consistently and avoids unintended compliance issues.

OAR 581-053-0240, Section (85)

The proposed additions in paragraphs (g) and (h) introduce new standards related to wheelchair placement and securement, but no implementation date is identified. Without a defined effective date, this rule could be interpreted as requiring immediate compliance upon adoption, potentially creating confusion about whether existing buses must be retrofitted to meet the new specifications. If that is the intent, the operational and financial implications are significant.

If the goal is to prevent wheelchairs from blocking exits or to improve accessibility practices on buses already in service, that expectation would be better addressed in an operational rule rather than through the minimum construction standards. As written, this change would take effect immediately upon passage, effectively creating the same lead-time and implementation challenges seen with other recent changes, such as those in Sections (17) and (34). Clarifying whether this applies prospectively to new buses or retroactively to those currently in service would prevent confusion and avoid unnecessary costs for districts.

OAR 581-053-0650

The proposed revisions to OAR 581-053-0650 update and expand the minimum standards for all-electric school buses, including several important and positive changes to safety and system design. However, there is no implementation date identified for when these new standards take effect. Electric buses typically have longer manufacturing and delivery timelines than diesel or gasoline models, which creates uncertainty for districts with buses already on order. Without a defined effective date, districts could find themselves out of compliance for vehicles purchased under current standards but not yet delivered. Establishing a clear implementation timeline would allow districts to plan purchases appropriately and avoid unintended costs or delays for buses already in production.

Thank you for your attention to this matter. Please feel free to contact me if any clarification or further discussion is needed regarding my comments. I look forward to the continued improvement of our transportation system through thoughtful rulemaking.

Sincerely,

T.J. Crockett

October 16, 2025

To Chair Scurlock, Vice-Chair Richardson, and Members of the State Board of Education,

I provide this testimony today with urgency — asking this body to interrupt a system that can no longer effectively serve Oregon’s students.

I am a retired middle school teacher, married to a current middle school science teacher, and a parent and full-time caregiver of our adult son with autism. As a former city councilor and the current chair of the Forest Grove School Board, thirty years of experience in Oregon classrooms and communities compel me to speak plainly: our education system is collapsing under its own weight, and the State Board must lead.

At a previous meeting, Director Forde inspired me by asking whether the work of this body is having any impact, and she recognized the position of power that you each hold on this board and the potential for impact that your voices hold. She was asking the right questions! Her comments struck me deeply — because right now, Oregon has no coherent vision for education. There are plans for policies and programs, plenty of charts and frameworks for implementation - but no clear articulation of the vision of where we are headed and how we will provide adequate funding to get there. Incredulously, we continue to build out new systems and mandates that steal time and capacity from district leaders who should be focused on improving instruction - not compiling accountability data to be shared into the abyss of data the state already holds.

Education policy is increasingly being driven by legislators with little understanding of effective classroom practice. Legislators with no experience in the classroom cannot be working independently of each other to provide direction through policy...mostly because it is the wrong policy geared towards the wrong outcomes. Districts are not asking for these laws or policies— and yet we are forced to implement them, no matter how much chaos they create. The new Accountability Bill is only the latest example.

The State Board of Education was created to *set policy and standards for Oregon’s schools* and to *ensure equitable outcomes for every student*. Remaining “neutral” in the face of uniformed, damaging policy is a disservice to that mission. ***This body has both the authority and the responsibility to intervene when legislation undermines educational best practices.***

Research by John Hattie and countless others shows that the most powerful driver of student success is *collective teacher efficacy*. An accountability system that fostered collaboration and alignment around effective instruction could have elevated our schools. But this state went in the exact opposite direction: instead, we are left with more data points, more bureaucracy, and no improvement in teaching or learning. That is leadership that may have been well-intentioned, but it is already doing damage by stealing time and prioritizing a focus that is directly in opposition to best practices in the classroom.

Superintendents and school boards across the state have sounded the alarm, we have talked to our legislators who now seem to be led by special interest groups, yet no one has stepped in to stop this train. Districts are cutting budgets, juggling new reporting demands, and chasing compliance instead of focusing on students. The Department of Education, already stretched thin, is being asked to monitor new accountability measures when it can barely support the ones already in place. Trust is gone— not because of the individuals trying to do the work, but because the system keeps adding pressure without relief.

I urge you: do not remain neutral. Use your voices to stop this cycle. If the State Board cannot articulate a clear vision for Oregon education, then who can? If legislators are defining educational policy without grounding in classroom practice — and this body does not intervene — where are districts supposed to turn?

Please continue to ask the hard questions - and the right question could start with this: why, if we know what good teaching looks like, are we not investing in the development of principals as instructional leaders and teachers who employ evidence-based practices. The state is perpetuating the exact same "school" model that has been in place for 200 years. The definition of insanity, said Albert Einstein, is doing the exact same thing and expecting a different result.

I am pleading with this board to not be afraid to interrupt the path we are headed down in this state. It is essential that we pivot and like Director Tymchuk just mentioned, be able to define what our definition of success is. We can't move forward until we do. Our students are counting on you to lead.

581-053-0050

Driving and Criminal Records

(1) The Oregon Department of Education shall review the driving record of each applicant for certification or approval as a school bus or school activity driver. Applicants who have held a driver license in a state other than Oregon anytime during the preceding three-year period may be required to furnish a copy of ~~the the~~ driving record from each state or other jurisdiction's driver licensing agency in which the applicant has held a driver license to ODE. If the driver currently holds a driver license from another state or other jurisdiction, the driving record shall be printed no more than 30 days prior to the date received by ODE.

(2) ODE shall review the criminal record of each applicant for certification or approval as a school bus or school activity driver.

(3) An applicant does not qualify as a school bus or school activity driver if the applicant:

(a) Has ever been convicted of a crime listed in ORS 342.143 (Forever Crime); or,

(b) Is currently subject to mandatory registration reporting as a sex offender in this state or any other jurisdiction; or,

(c) Has ever been convicted of a crime involving violence, threat of violence or theft. This shall not apply if the applicant or driver has been free from custody, probation and parole for the preceding three-year period from date of application; or,

(d) Has ever been convicted of a crime involving activity in drugs or alcoholic beverages. This shall not apply if the applicant or driver has been free from custody, probation, and parole for the preceding three-year period from date of application; or,

(e) Has had his or her driving privileges suspended by any state or other jurisdiction, within the preceding three-year period, for a cause involving the unsafe operation of a motor vehicle or because of driving record.

(f) Is required to use an ignition interlock device (IID).

(g) Has been convicted within the preceding three-year period of:

(A) Driving under the influence of intoxicants, as defined in ORS 813.010;

(B) Reckless driving, as defined in ORS 811.140;

(C) Fleeing or attempting to elude a police officer, as defined in under ORS 811.540;

(D) Failure to perform the duties of a driver involved in an accident or collision which results in injury or death of any person, as described in ORS 811.705; or

(E) An equivalent out of state conviction for any of the above.

(h) Has had his or her driving privileges revoked or suspended as a habitual offender under ORS 809.600. This shall not apply if applicant or driver has had his or her driving privileges restored under ORS 809.660 for the preceding three years;

(i) Has a driving record for the preceding three-year period that has an accumulation of 31 or more points based upon the following point system:

(A) Each chargeable accident shall have a value of 10 points. Applicable traffic code and preventability guidelines published by the National Safety Council and the Pupil Transportation Safety Institute may be used to determine if an accident is chargeable; and

(B) Each of the traffic violations on Table 1 shall have a value of 10 points.

(C) One point shall be subtracted from the total number of points for each full month, since the last chargeable accident or conviction, to the time of driving record check; however, all subtracted points will be reinstated if any additional qualifying convictions or chargeable accidents occur within the three-year calculation period.

[ED. NOTE: Tables referenced are available from the agency.]

Statutory/Other Authority: ORS 327.013 & 820.100 - 820.120

Statutes/Other Implemented: ORS 327.013, 820.100, 820.105, 820.110 & 820.120

History:

[ODE 7-2023, amend filed 03/29/2023, effective 03/29/2023](#)

ODE 40-2014, f. & cert. ef. 9-3-14

ODE 19-2012, f. & cert. ef. 6-14-12

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AGENDA ITEM: Pupil Transportation Rule Updates

<p>SUBJECT: Pupil Transportation Rule Updates 2025 STAFF NAME & OFFICE: Brock Dittus, Pupil Transportation & Fingerprinting</p> <p>Changes to Oregon school bus minimum standards following the national congress on school transportation in May (NCST) to align Oregon's requirements with the national standards as required in statute, and technical fixes addressing intrastate activity bus carriers, on request delivery of training histories, and clarification on type of driving record for driver applications.</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

Oregon Department of Education has been given the responsibility by the legislature for oversight and regulation of school transportation since the late 1970s, and in that time has maintained an excellent safety record among its district partners, contracted transportation providers, and other operators serving K-12 education programs. A significant reason for this success in safe and equitable transportation has been the development and maintenance of detailed regulations on what is permissible for use in the transportation of students.

The National Congress on School Transportation (NCST) is the voluntary body of representatives from states across the nation that convenes to review and revise the National School Transportation Specifications and Procedures Manual from which states draw their own requirements for pupil transportation vehicle construction and design. Oregon is statutorily required to align with these standards under ORS 820.100 (4)(b), stating that Oregon pupil transportation vehicle standards “shall be consistent with minimum uniform national standards, if such standards exist.”

The NCST convened in May 2025; Oregon attended with a delegation of state employees and district transportation supervisors to offer input and vote on the proposed changes to the National School Transportation Specifications and Procedures Manual. Following the conclusion of the congress, Oregon’s Pupil Transportation & Fingerprinting unit staff adapted Oregon’s Administrative Rules in light of the new changes to align with the newest national standards. While the board does have discretion to adopt or reject the proposed changes, state law does require that Oregon’s pupil transportation vehicle standards be substantially aligned with the NCST manual.

Special Pupil Activity Bus (SPAB) is the term given in rule for a motorcoach used to transport students for activity trips. OAR has made provision for this category since 2012 to provide options for school activity trips when time, distance, or driver availability might otherwise make such a trip difficult to schedule. In the last school year, a few small businesses that only operate in intrastate commerce (within Oregon only) brought to light the fact that Oregon’s SPAB carrier rule requirements require application materials that limit successful applications to interstate carriers. The proposed rule change presented aims to

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hold intrastate carriers to the same equivalent standards applicable to interstate carriers and remove barriers to successful carrier application with ODE.

ODE's Pupil Transportation unit has provided summary reports of active driver lists and school bus driver training histories as an aid to pupil transportation operations serving schools. Previously, these materials were provided by mail to transportation operations, but with the streamlining of electronic process and communications, the unit has been able to provide training histories on demand, and does so frequently at our customers' requests. The proposed rule change removes the twice yearly mandated distribution to avoid redundancy in the unit's work and make clear the option for customers to request those materials as needed.

In review of driver application procedures, it became clear that the only way ODE staff can make a clear and appropriate decision regarding a driver with out-of-state driving history is by ensuring that an official driving record from a state driver licensing agency is provided; other third-party record search options may be available, but are not from the authoritative agency to document ODE's decision. The proposed language will also account for driving history documents which come from outside the United States ("or other jurisdiction").

A summary of the proposed changes follows:

- 581-053-0240: changes to school bus construction standards to align with 2025 NCST updates.
- 581-053-0650: changes to electric-powered school bus construction standards to align with 2025 NCST updates.
- 581-053-0615: technical adjustment to requirements for Special Pupil Activity Bus (SPAB) carriers to allow those who only operate as intrastate (within Oregon) the same opportunity as interstate carriers.
- 581-053-0220: change to provide school bus driver list and training history records on request rather than on a twice yearly basis.
- 581-053-0320: change to provide activity vehicle driver list on request rather than on a twice yearly basis.
- 581-053-0050: specification of an official driving history from a state driver licensing agency for driver applicants with out-of-state driving history, and broadening rule language to account for applicants with international driving history.

This is an "omnibus" rulemaking, addressing a number of smaller technical matters related to pupil transportation within the state of Oregon. It is anticipated that these changes will result in an equal or greater degree of safety for the pupils and program staff transported in Oregon, and should present no burden or inconvenience to the students enrolled in Oregon schools.

SUMMARY OF PREVIOUS BOARD ACTION

The board has reviewed changes to the Oregon minimum standards whenever changes are deemed necessary, including for previous revisions of the national standards. On other topics, the board has not had previous action. This is the second time the current proposed changes have been brought to the current state board, and the board had no questions related to the previous docket in September.

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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: This version includes minor updates to vehicle standards to make clear approval of a new lighting system for school bus crossover mirrors.

POLICY ISSUE OR CONCERNS

Oregon supervisors and maintenance managers contributed to the review of the NCST proposals, both in 2020 before the cancellation of that year's intended congress, and in advance of the 2025 event. Some participated as members of the delegation to provide practical input from their operational experience to guide the delegation's responses during the congress.

Changes to the SPAB carrier rule were drafted after learning that certain Oregon carriers were effectively barred from offering their services on a technicality. In at least one case, the carrier had been previously approved when they were operating in interstate commerce, but no longer qualified when they became an intrastate-only carrier on the rule's technical wording. Since ODE hopes to encourage success of small businesses that contract transportation services with Oregon schools, the proposed changes were drafted after consultation with our Department of Justice and Department of Administrative Services contacts.

Changes to the administrative process rules for driver applications are presented in an effort to adequately document and communicate driver approval and certificate status to our customers operating transportation programs for Oregon schools. Once the appropriate updates were identified based on a review with unit staff, rules were drafted to account for a modernized and streamlined approach to the work.

All changes have demonstrable impacts in establishing or increasing the safety of students, employees, and the general public and are proposed to that aim, and are intended to include historically underserved communities in that effort. No barriers to more equitable outcomes have been identified in preparation of the proposed rule changes.

EQUITY IMPACT ANALYSIS

Upon review from an equity perspective, no negative equity impacts have been identified in preparation of these changes.

FISCAL ANALYSIS

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Some changes to the minimum standards for Oregon school buses may result in increases to the total cost of new vehicle acquisition. These costs will typically be eligible for reimbursement from the state school fund as any eligible asset or cost is under Oregon Administrative Rule 581-023-0040.

EFFECT OF A "YES" OR "NO" VOTE

A Yes vote will allow Oregon's minimum standards for school buses and activity vehicles to align with national standards as required by statute, and account for technical changes deemed prudent or necessary for ODE's administration of pupil transportation programs.

A No vote will require additional consideration to determine how to otherwise align Oregon's minimum standards for school buses and activity vehicles as required by statute, and account for technical changes deemed prudent or necessary.

STAFF RECOMMENDATION

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

ATTACHMENTS

- Attachment 1: Draft of OAR 581-053-0240
- Attachment 2: Draft of OAR 581-053-0650
- Attachment 3: Draft of OAR 581-053-0615
- Attachment 4: Draft of OAR 581-053-0220
- Attachment 5: Draft of OAR 581-053-0320
- Attachment 6: Draft of OAR 581-053-0050

581-053-0240

Minimum Standards for School Buses

(1) Air Cleaner

(a) The engine intake air cleaner shall be furnished and properly installed by the chassis manufacturer to meet engine specifications;

(b) All Type C and Type D buses equipped with diesel engines shall have an air cleaner restriction indicator properly installed by the chassis manufacturer to meet engine specifications.

(2) Air System: All buses equipped with air systems for brakes shall provide and identify an appropriate air port for plumbing in air powered accessories.

(3) Air-Operated Accessories: Air-operated accessories shall be plumbed into the vehicle's air supply system in compliance with all the following:

(a) Safeguarded by a check valve or equivalent device located between the air supply system and the accessory to prevent air loss due to accessory failure. This shall include the supply line for a designated accessory air tank;

(b) Connected to the air supply system in compliance with all applicable Federal Motor Vehicle Safety Standards;

(c) Connected in the manner prescribed by the vehicle manufacturer.

(4) Aisle:

(a) Minimum clearance of all aisles shall be 12 inches.

(b) Minimum clearance of aisles from wheelchair areas to an emergency door shall be at least 30 inches wide to permit passage of a wheelchair. Special service entrance doors are not considered emergency doors unless in compliance with all right side emergency door requirements.

(5) Axles: The front and rear axles and suspension systems shall have a gross axle weight rating at ground commensurate with the respective front and rear weight loads of the bus loaded to the rated passenger capacity.

(6) Body Construction:

(a) Construction shall be of prime commercial quality steel, or other metal, or other material with strength at least equivalent to all-steel as certified by bus body manufacturer;

(b) Construction shall provide a water-tight and reasonably dustproof unit;

(c) Must meet or exceed applicable federal motor vehicle safety standards for construction, effective December 2, 1993.

(7) Body Sizes:

(a) Body manufacturer shall determine the vehicle's maximum designed and equipped passenger capacity and post it on the vehicle with the GVWR and vehicle compliance information.

(b) For determining standard requirements on buses with power lifts and wheel chair tie down stations, the passenger and gross vehicle weight rating classification will be determined as if the vehicle were equipped with a standard seating arrangement.

(8) Brakes:

(a) Air brakes are required on all buses having a manufacturer's gross vehicle weight rating of 26,001 pounds or greater;

(b) Buses using air or vacuum in the operation of the brake system shall be equipped with warning signals, readily audible and visible to the driver, that will give a continuous warning when the air pressure available in the system for braking is 60 psi (pounds per square inch) or less or the vacuum in the system available for braking is 8 inches of mercury or less. An illuminated gauge shall be provided that will indicate to the driver, the air pressure in pounds per square inch available for the operation of the brake.

(A) Vacuum-assist brake systems shall have a reservoir used exclusively for brakes which shall be adequate to ensure loss in vacuum at full stroke application of not more than 30 percent with engine not running. Brake system on gas-powered chassis shall include suitable and convenient connections for the installation of separate vacuum reservoir;

(B) Any brake system dry reservoir shall be so safeguarded by a check valve or equivalent device that in the event of failure or leakage in its connection to the source of compressed air or vacuum, the stored dry air or vacuum shall not be depleted by the leakage or failure.

(c) Buses using a hydraulic assist-booster in the operation of brake system shall be equipped with a warning signal, readily audible and visible to the driver, which will provide continuous warning in the event of a loss of fluid pressure from primary source or loss of electric source powering the backup system;

(d) The brake lines and booster-assist lines shall be protected from excessive heat and vibrations and be so installed as to prevent chafing;

(e) All brake systems shall be designed to permit visual inspection of brake lining wear without removal of any chassis components except for inspection dust covers or wheels;

(f) Air brake systems shall be equipped with manual drain valves on all air tanks. A provision shall be made to operate manual drain valve(s) on first (wet) reservoir(s) from the side of the bus unless one of the following options is provided:

(A) Automatic moisture ejector on the first (wet) reservoir;

(B) An air dryer that has the drying ability to ensure an adequate margin of safety under normal and adverse operating conditions;

(C) Skirt-mounted controls for manual drain valve(s) shall not extend beyond the outer side of bus skirt panel.

(9) Bumper (Front):

(a) The bumper on Type A-2, B, C, and D buses shall be equivalent in strength and durability to pressed steel channel at least 3/16 inches thick and not less than 8 inches wide (high). It shall extend beyond the forward-most part of the body, grille, hood and fenders and shall extend to the outer edges of the fenders at the bumper's top line.

(b) Type A-1 buses may be equipped with an OEM-supplied bumper.

(c) The bumper shall be of sufficient strength to permit pushing or being pushed by another vehicle with the same GVWR on a smooth surface with a five degree (8.7 percent) grade, without permanent distortion to the bumper, chassis, or body.

(d) The bumper shall be designed or reinforced so that it will not deform when the bus is lifted by a chain that is attached to both tow hooks when the bus is empty and positioned on a level, hard surface and both tow hooks share the load equally.

(e) Deer guards may be added to a front bumper to protect the front grill. Deer guards shall not be in any portion of the driver's forward view, including use of all mirrors.

(10) Bumper (Rear):

(a) Rear bumper for all body on chassis units shall be of pressed steel channel or equivalent material at least 3/16-inch thick and eight inches wide (high), and of sufficient strength to permit pushing by another vehicle without distortion;

(b) Bumper for all body on chassis units shall wrap around back corners of bus. It shall extend forward at least 12 inches, measured from rear-most point of body at floor line;

(c) Bumper shall be attached to chassis frame in such manner that it may be easily removed, shall be so braced as to develop full strength of bumper section from rear or side impact, and shall be so attached as to prevent the insertion of small fingers between the body and bumper;

(d) Bumper shall extend beyond rear-most part of body surface at least one inch, measured at floor line;

(e) An energy absorbing rear bumper may be used providing a self-restoring energy absorbing bumper system so attached as to prevent the hitching of rides and of sufficient strength to permit pushing by another vehicle without permanent distortion to the bumper, chassis, or body;

(f) The manufacturer of the energy absorbing system shall provide evidence from an approved test facility (capable of performing the above FMVSS tests) that their product conforms to the above.

(11) Cameras:

(a) 360-degree camera system: A 360-degree camera system may be installed:

(A) The camera housings shall not block any signage or lights that are required;

(B) The monitor for the camera system shall not block the view of any window, gauge, or required indicator light.

(C) The monitor shall only work when:

(i) The transmission is in reverse;

(ii) The transmission is in park; or

(iii) The parking brake is set.

(b) Back-up camera: A back-up camera may be installed.

(A) The camera housing shall not block any signage or lights that are required.

(B) The monitor for the back-up camera system shall not block the view of any window, gauge or required indicator light.

(C) The monitor shall only work when the transmission is in reverse or when activated as part of a 360-degree camera system.

(c) Forward-facing camera: A forward facing camera may be installed:

(A) If installed outside of the vehicle, it shall be installed on the front of the vehicle and shall not block any signage or lights that are required;

(B) If installed inside of the vehicle, it shall be mounted so that it does not block the view of any window, mirror, gauge, or required indicator light.

(d) Video surveillance cameras may be mounted inside or on either the forward or rear bulkhead, or to the ceiling in compliance with the following requirements:

(A) Surface mounted camera/camera housing/recording devices shall be mounted as far forward (if forward mounted) or as far rearward (if rear mounted) as possible and directly above the center of the windshield/rear window, and shall not:

(i) Extend into the passenger compartment more than 9 inches;

(ii) Extend(s) down from the ceiling more than five inches;

(iii) Be more than five inches wide;

(iv) Interfere with the rear view mirror or sun visor.

(B) Recording devices or their housings shall not be mounted overhead in the passenger compartment;

(C) Video cameras/housings (not recorders) may be mounted overhead in the passenger compartment, provided they are over the seating area, but not over any part of the aisle, all edges must be rounded and/or protected with enclosure of shatterproof construction;

(D) Flush mounted cameras/housings may be mounted in any position in the front or rear bulkhead or ceiling provided that any modification to the body, in order to achieve flush mounting does not compromise the structural integrity of the body panels;

(E) All video related devices mounted to the interior bus body shall be securely fastened in a manner to prevent separation from the bus body in the event of collision or mishap;

(F) Recording devices/housings must allow ready access for camera and video recording medium removal without the use of tools;

(e) a Stop Arm Camera system may be installed which may record drivers who fail to stop for bus safety lights in violation of ORS 811.155, and that is capable of recording the date, time, registration plate number and location of the offense.

(f) All electrical connections shall be made with UL approved wiring and terminals, and protected by grommets any place it passes through metal panels. Any electrical load added to the vehicles electrical system shall be protected with appropriate over current device (fuse).

(12) Certification:

(a) The vehicle shall be certified as a "School Bus" as required in the FMVSS certification requirements of 49 CFR part 567.

(b) Manufacturer will, upon request, certify to the Oregon Department of Education that their product meets minimum standards on items not covered by FMVSS certification requirements of 49 CFR part 567.

(13) Chains, Automatic: Automatic tire chains (traction) may be installed at drive wheels in conformance with manufacturer specifications and any applicable chassis manufacturer standards. (Note: Air-applied chain systems must comply with air-operated accessory requirement included in this rule.)

(14) Child Safety Restraint Systems:

(a) Child safety restraint systems used for transporting infants, toddlers, or others requiring added support shall conform to specific strength and performance standards or dynamic test standards identified in 49 CFR 571.213 ~~for protection of a child up to 50 pounds;~~

(b) Child safety restraint systems shall bear a label specifying compliance with all applicable Federal Motor Vehicle Safety Standards at the time of their manufacture;

(c) Child safety restraint systems shall be secured to the school bus seat as per the manufacturer's instructions. If used, a child safety restraint anchorage system must meet 49 CFR 571.225 and a seat belt shall meet section 62 of this rule.

(15) Clutch:

(a) Clutch torque capacity shall be equal to or greater than, the engine torque output;

(b) A starter interlock shall be installed to prevent actuation of the starter if the clutch is not depressed on all buses manufactured after January 1, 1999.

(16) Color:

(a) Chassis and bumpers shall be black; Wheels may be painted either black or National School Bus Yellow. Type A-1, A-2, and B buses may have manufacturer standard color wheels.

(b) The school bus body shall be painted a uniform National School Bus Yellow. The body exterior paint trim, bumper, lamp hoods, and emergency door lettering shall be black. The engine hood may be painted low-luster yellow. The roof of the bus may be painted white. The white color may extend across the roof down to the drip rails or within 6 inches above the passenger windows on the sides of the bus except that front and rear caps shall remain National School Bus Yellow. Retroreflective material may be used as trim on rear bumper;

(17) Crossing Arm: A crossing arm ~~may~~shall be mounted on the front of a school bus in accordance with the following specifications:

- (a) Installed on the front bumper as close as practicable to the right (curb) side, opening left to right and providing an extension of the curbside of bus;
- (b) Arm shall be located at least 18 inches but not more than 32 inches above ground level and in the closed position; arm shall not cover numbers on license plate;
- (c) Installed in a manner to limit the outward deployment to 90 degrees from the front bumper;
- (d) Arm shall extend 70 inches from the front bumper in its extended position;
- (e) Arm shall be activated through the existing bus safety light system assuring the driver is required to take no additional action to either deploy or retract the arm. No outward movement of the arm may occur before red flashing sequence begins;
- (f) Override switches are prohibited;
- (g) Crossing arm must be safeguarded from damage due to pushing or pulling by hand through the use of a clutch-like device or equivalent, double spring hinges are not acceptable);
- (h) The arm may be equipped with an amber flashing light that functions only when the arm is in the fully extended position;
- (i) Entire unit shall have no sharp edges or other projections that could injure children or others due to casual contact;
- (j) Unit shall provide secure mounting opportunities to prevent misalignment or failure due to extreme weather conditions;
- (k) Shall be either air, vacuum, or electrically operated and in conformance to section (71)(g) of this rule;
- (l) Crossing arm color shall be yellow or yellow and black;
- (m) All components and connections shall be weatherproofed.

(n) A crossing arm shall not be required on buses manufactured prior to January 1, 2026.

(18) Cup holders on vehicles manufactured after July 1, 2013, shall not be allowed. No additional cup holders shall be installed.

(19) Defrosters:

- (a) Defrosting and defogging equipment shall direct a sufficient flow of heated air onto the windshield, the window to the left of the driver and the glass in the viewing area directly to the right of the driver to reduce the amount of frost, fog and snow;
- (b) The defrosting system shall conform to SAE performance standards J-381;
- (c) The defroster and defogging system shall be capable of furnishing heated outside ambient air, except that part of the system furnishing additional air to the windshield, entrance door and step well may be of the recirculation air type;
- (d) Auxiliary fans, if used, shall not be considered as a defrosting and defogging system:

(A) Auxiliary fans shall be mounted above the windshield, so as not to interfere with the driver's vision of the roadway, mirrors or students outside the bus;

(B) The fan blades shall be covered with a protective cage.

(20) Doors:

(a) Service door shall be under the driver's control, designed to afford easy release and to provide a positive latching device on manual operating doors to prevent accidental opening. When hand lever is used, no part shall come together so as to shear or crush fingers. Manual door controls shall not require more than 25 pounds of force to operate at any point throughout the range of operation, as tested on a 10% grade, both up hill and downhill;

(b) Service door shall be located on right side of bus opposite driver and within direct view;

(c) Service door shall have minimum horizontal opening of 24 inches and minimum vertical opening of 68 inches;

(d) Service door shall be a split-type door and shall open outward;

(e) If service door is power operated, pressure shall be controlled by a regulator valve or switch and provision shall be made for opening the door manually in the event of driver disability or mechanical failure. Emergency release valve or switch for power operated doors shall be located in an accessible place, in plain view, as near the service door as practicable. Valve or switch shall be properly identified and "open" and "closed" position plainly marked, and shall have no more than two positions;

(f) All service door windows shall be approved safety glass. Bottom of lower glass panel shall not be more than ten inches from top surface of bottom step. Top of upper glass panel shall not be more than six inches from top of door.

(g) Vertical closing edges on the service door shall be equipped with flexible material to protect children's fingers.

(h) There shall be no door to left of driver. (This shall not be interpreted to conflict with emergency doors or windows.) Type A-1 and A-2 and B buses may be equipped with chassis manufacturers' left side driver's door;

(i) All doors shall be equipped with an energy absorbing pad at the top edge of each door opening. Pad shall be at least 3 inches wide and 1-inch-thick and extend the full width of the door opening.

(21) Drive Shaft: Drive shafts over 24 inches in length shall be protected by metal guard or guards around circumference of drive shaft to reduce the possibility of the shaft whipping through floor or dropping to ground if broken. Guards shall be mounted around front half of each drive shaft section.

(22) Electrical System:

(a) Battery(ies):

(A) Battery shall have a minimum cold cranking capacity rating equal to the cranking current required for 30-seconds at 0° Fahrenheit (-17.8c) and a minimum reserve capacity rating of 120-minutes at 25 amps. Higher capacities may be needed dependent upon optional equipment and local environmental conditions;

(B) The manufacturer shall securely attach the battery(ies) on a slide-out or swing-out tray in a closed, vented compartment in the body skirt so that the battery(ies) is accessible for convenient servicing from the outside. Battery compartment(s) door or cover shall be hinged at front or top and secured by adequate and conveniently operated latch or other type fastener. Type A-1 and A-2 buses may have battery(ies) mounted under the hood in an accessible location;

(C) Access to battery shall not be through body floor;

(D) Buses may be equipped with a battery shut-off switch. The switch shall be placed in a battery compartment or the engine compartment.

(b) Circuits: An appropriate identifying diagram (color and number coded) for electrical circuits shall be provided to the body manufacturer for distribution to the end user;

(c) Generator or Alternator:

(A) All buses with a GVWR of 14,500 pounds or less shall have a generator or alternator with a minimum rating of at least 130 amperes (in accordance with Society of Automotive Engineer rating) with minimum charging of 50 percent of maximum rated output at manufacturer's recommended engine idle speed (12-volt system), and shall be ventilated and voltage-controlled and, if necessary, current-controlled;

(B) All buses with a GVWR greater than 14,500 pounds shall have a generator or alternator with a minimum rating of at least 160 amperes (in accordance with Society of Automotive Engineer rating) with minimum charging of 50 percent of maximum rated output at manufacturer's recommended engine idle speed (12-volt system), and shall be ventilated and voltage-controlled and, if necessary, current-controlled;

(C) Generator or alternator may be direct/gear driven or belt driven. Belt driven generator or alternators shall be capable of handling the rated capacity of the generator or alternator with no detrimental effect on other belt driven components;

(d) Wiring, Chassis:

(A) General — all wiring shall conform to current applicable recommended practices of the Society of Automotive Engineers. All wiring shall use a standard color coding and each chassis shall be delivered with a wiring diagram that coincides with the wiring of the chassis;

(B) Chassis manufacturer shall install a readily accessible terminal strip or plug on the body side of the cowl, or at accessible location in engine compartment of vehicles designed without a cowl, which shall contain the following terminals for the body connections:

(i) Main 100-amp body circuit;

(ii) Tail lamps;

(iii) Right turn signal;

(iv) Left turn signal;

(v) Stop lamps;

(vi) Back up lamps;

(vii) Instrument panel lights (controlled by dimmer switch).

(e) Wiring, Body:

(A) All wiring shall conform to current standards of Society of Automotive Engineers;

(B) Circuits:

(i) Wiring shall be arranged in circuits, as required, with a circuit protection system. A system of color or number coding shall be used for all buses purchased after September 1, 1993 and an appropriate identifying diagram shall be provided the end user along with the wiring diagram provided by the chassis manufacturer. The following interconnecting circuits shall be color coded as noted:

(I) Left rear directional light — yellow;

(II) Right rear directional light — dark green;

(III) Stop lights — red;

(IV) Back-up lights — blue;

(V) Tail lights — brown;

(VI) Ground — white;

(VII) Ignition feed, primary feed — black;

(VIII) The color of cables shall correspond to SAE J1128.

(ii) Wiring shall be arranged in at least seven regular circuits, as follows:

(I) Head, tail, stop (brake) and instrument panel lamps;

(II) Clearance and step well lamps (step well lamp shall be activated when service door is opened);

(III) Dome lamp;

(IV) Ignition and emergency door signal;

(V) Turn signal lamps;

(VI) School Bus Safety Lights;

(VII) Heaters and defrosters.

(iii) Any of above combination circuits may be subdivided into additional independent circuits;

(iv) Whenever possible, all other electrical functions (such as sanders and electric-type windshield wipers) shall be provided with independent and properly protected circuits.

(C) The entire electrical system of the body shall be designed for the same voltage as the chassis on which the body is mounted;

(D) All wiring shall have an amperage capacity equal to or exceeding the designed load. All wiring splices are to be done at an accessible location and noted as splices on wiring schematic;

(E) Each body circuit shall be coded by number or letter on a diagram of easily readable size and be furnished with each bus body or affixed in an area convenient to the electrical accessory control panel;

(F) Body power wire is to be attached to special terminal on the chassis;

(G) All wires passing through metal openings shall be protected by a grommet;

(H) Wires not enclosed within body shall be fastened securely at intervals of not more than 18 inches. All joints shall be soldered or joined by equally effective connectors and shall be moisture and corrosion resistant.

(I) A 12-volt power port may be installed in the driver's area;

(J) There shall be a non-momentary manual noise suppression switch installed in the control panel. The switch shall be clearly labeled and distinguishable from other switches. This switch shall be an on/off type that deactivates body equipment that produces noise, including the AM/FM/audio radio, heaters, air conditioners, fans and defrosters. The switch shall not deactivate safety systems such as windshield wipers or lighting systems.

(23) Emergency Equipment:

(a) Belt cutter: Each bus shall have a belt cutter mounted in the driver's compartment within reach of a driver sitting in the driver's seat. Belt cutter shall be of a design offering protected cutting edges to prevent accidental or intentional injury to drivers or passengers;

(b) Emergency road reflectors:

(A) Each bus shall be equipped with at least three reflex reflective triangle vehicle warning devices that conform to 49 CFR 581.125;

(B) Reflectors must be in a container securely mounted with nut-and-bolt fasteners enhanced with large flat (fender) washers or held in place by a nut-and-bolt mounted metal bracket that also protects and secures the container lid. Both shall be located in an accessible location. Reflectors shall not be mounted in any engine compartment;

(c) Body fluid cleanup kit: Buses shall have a removable moisture proof and dust proof body fluid cleanup kit, mounted in an accessible place within the driver's compartment. Contents shall include at least the following items:

(A) Two pair rubber/latex gloves;

(B) Two four-ounce packages of stabilized chlorine absorbent deodorant (or equivalent) capable of stabilizing at least 1 liter/36 fl. oz. of body fluids;

(C) One spatula for pick up of congealed fluid;

- (D) One plastic bag in which to place congealed fluid;
 - (E) One red plastic bag with tie, identified for infectious waste and as a bio-hazard;
 - (F) One two-ounce bottle of germicidal detergent to apply to a contaminated area;
 - (G) Four paper towels to wipe up contaminated area;
 - (H) One one-ounce antiseptic alcohol hand rinse (or equivalent);
 - (I) One placard of step by step use instructions;
 - (J) Germicidal detergents, stabilized chlorine absorbent deodorant, alcohol hand rinse, or their equivalents shall provide documentation of EPA approval regarding their microbiological efficacy for at least the following:
 - (i) Staphylococcus aureus;
 - (ii) Pseudomonas aeruginosa;
 - (iii) Salmonella choleraesuis;
 - (iv) Streptococcus species;
 - (v) Herpes simplex Type II;
 - (vi) HIV (Associated with AIDS);
 - (vii) Fungi (athlete's foot);
 - (viii) Poliovirus; and
 - (ix) Tuberculosis.
 - (K) Documentation of efficacy for Hepatitis B may be hospital or test studies. The certified effective shelf life of these products shall be a minimum of 12 months. Product expiration date shall be clearly displayed on all time-sensitive products.
- (d) Fire extinguishers:
- (A) Each bus shall be equipped with at least one pressurized, dry, chemical type fire extinguisher, mounted in a bracket, located in the driver's compartment, and readily accessible. A pressure gauge shall be mounted on the extinguisher so as to be readily read without removing the extinguisher from its mounted position;
 - (B) The fire extinguisher shall be of a type approved by the Underwriters Laboratories, Inc., with a rating of not less than 2 A-10 BC. The extinguisher shall have a minimum five-pound capacity and equipped with a hose and nozzle;
 - (C) The operating mechanism shall be sealed with a type of seal that will not interfere with the use of the fire extinguisher;

(D) Extinguishers with plastic heads are not permitted.

(e) First aid kit;

(A) Each bus shall have a readily removable, moisture proof and dustproof first-aid kit container mounted in an accessible place within driver's compartment;

(B) The first aid kit contains a minimum of 24 units that shall include the following:

(i) One 1" adhesive compress — 16 per unit;

(ii) Two 2" bandage compress — 4 per unit;

(iii) Two 3" bandage compress — 2 per unit;

(iv) Two 4" bandage compress — 1 per unit;

(v) Two 3" x 3" plain gauze pads — 4 per unit;

(vi) Two 2" x 6 yards gauze roller bandage — 1 per unit;

(vii) Three 1/2 square yard gauze;

(viii) Three 24" x 72" gauze;

(ix) Four triangular bandages;

(x) One 1/2 x 5 yards adhesive tape - one per unit;

(xi) One round nose scissors and tweezers. Latex gloves - one pair; and

(xii) One micro-shield for mouth-to-mouth airway (to lay on top of other contents).

(C) Specific local requirements may be substituted in lieu of 2 units of 1/2 square yard gauze.

(f) Any piece of emergency equipment may be mounted in an enclosed compartment, provided the compartment is labeled in not less than 1 inch letters, identifying each piece of equipment contained therein. If emergency road reflectors are stored outside the driver's compartment, the location of the triangles shall be displayed in a readily viewable location by the driver in minimum 1 inch letters.

(24) Emergency Exits:

(a) All emergency exits and doors shall comply with the design and performance requirements of 49 CFR 571.217, Bus Emergency Exits and Window Retention and Release applicable to that type of exit.

(b) In addition to the requirements of 49 CFR 571.217, all emergency exits and doors shall meet the additional requirements:

(A) Doors:

- (i) Upper portion of emergency door shall be equipped with approved safety glazing, exposed area of not less than 400 square inches;
- (ii) Lower portion of rear emergency door shall be equipped with approved safety glass and shall have an exposed area of not less than 350 square inches of approved safety glazing;
- (iii) There shall be no steps leading to emergency door;
- (iv) Clearance between outside emergency door handle and emergency door shall not exceed 1/4 inch when handle is in the closed position. Handle shall not provide a firm handhold for someone trying to “hitch” a ride. Handles shall be positioned to prevent snagging of clothing or pinching of fingers;
- (v) Emergency door hinge shall not provide an opening for insertion of fingers when door is closed;
- (vi) An adequately padded head bumper shall be placed on the interior directly above any emergency exit door opening. The pad shall extend the full width of the door opening and shall be at least three inches wide and one inch thick;
- (vii) If emergency door is lockable, provision must be made to prevent the bus from starting while the door is locked. An audible warning which does not affect engine operation shall be provided to alert the driver should the door be locked while the bus is in operation; and
- (viii) Emergency doors shall be labeled “Emergency Door” in minimum 2 inch letters that contrast with the background at the top of, or immediately above, the emergency door on both the inside and outside of the bus;

(B) Rear Push-Out Window:

- (i) Rear push-out window shall be operable from inside or outside the bus;
- (ii) Rear push-out window shall have a lifting assistance device that will aid in lifting and holding the rear emergency window open; and
- (iii) If rear push-out window is lockable, provision must be made to prevent the bus from starting while the exit is locked. An audible warning which does not affect engine operation shall be provided to alert the driver should the exit be locked while the bus is in operation;

(C) Swing-Out Windows:

- (i) Swing-out windows are windows along the side of the bus with a hinge that is opposite of the emergency release so that it “swings-out” when opened. Swing-out windows may be hinged along any edge of the window. If the hinge is installed vertically, it shall be installed on the forward side of the window;
- (ii) Swing-out windows shall not be located above a stop arm;
- (iii) Swing-out windows shall provide a minimum clear opening of 18” x 24”; and
- (iv) Swing-out windows that are inoperable from the outside shall include the message “Operates From Inside Only” adjacent to the outside “Emergency Exit” labeling required under 49 CFR 571.217;

(D) Roof Hatches:

- (i) Roof hatch shall be waterproof and provide a minimum clear opening of 16" x 16";
 - (ii) When a release mechanism on the roof hatch is open and the vehicle's ignition is in the "on" position, a continuous warning shall be audible at the drivers seating position; and
 - (iii) Roof hatch may also serve as a roof ventilator; however, this shall not be used in place of the required static vent.
- (c) Each bus shall be equipped with:
- (A) A rear emergency exit door and one roof hatch; or
 - (B) A left side emergency exit door, a rear emergency push out window, and one roof hatch.
- (d) Buses equipped with a rear emergency exit door and roof hatch (as in paragraph (c)(A) of this section) require additional emergency exits based on the maximum design passenger capacity listed below (see also table 1):
- (A) Buses designed or equipped with a maximum design passenger capacity of 1 to 22 shall also provide:
 - (i) 2 swing-out windows placed at approximately the midpoint of the passenger compartment; or
 - (ii) Side windows with a 12-inch vertical drop.
 - (B) Buses designed or equipped with a maximum design passenger capacity of 23 to 45 shall also provide:
 - (i) Left side emergency door; or
 - (ii) 2 swing-out windows at approximately the midpoint of the passenger compartment.
 - (C) Buses designed or equipped with a maximum design passenger capacity of 46 and above shall also provide one additional roof hatch and:
 - (i) Left side emergency door; or
 - (ii) 4 swing-out windows at approximately the midpoint of the passenger compartment, but not immediately adjacent to each other.
- (e) Buses equipped with a left side door and rear push-out window (as in paragraph (c)(B) of this section) require additional emergency exits based on the maximum design passenger capacity listed below (see also table 2):
- (A) Buses designed or equipped with a maximum design passenger capacity of 1 to 22 shall also provide:
 - (i) 2 swing-out windows placed at approximately the midpoint of the passenger compartment; or
 - (ii) Side windows with a 12-inch vertical drop.
 - (B) Buses designed or equipped with a maximum design passenger capacity of 23 to 45 shall also provide:

(i) Right side emergency door; or

(ii) Two 2 swing-out windows.

(C) Buses designed or equipped with a maximum design passenger capacity of 46 and above shall also provide one additional roof hatch and:

(i) Right side emergency door; or

(ii) Four swing-out windows.

(f) Any additional emergency exits necessary to comply with the “additional emergency exit area” requirements of 49 CFR 571.217 shall be made by the vehicle purchaser.

(g) Manufacturer shall identify all emergency exits used for calculations relating to this rule and 49 CFR 571.217 compliance and list the daylight (clear) opening for each exit.

(h) All emergency exits shall be marked on the exterior perimeter with one-inch retroreflective yellow or white material that meets the retroreflectivity requirements of section (59) of this rule.

(25) Emissions: School buses that operate on diesel fuel shall:

(a) Have engines manufactured on or after January 1, 2007; or

(b) Be retrofitted to meet the same federal emission standards as a bus equipped with an engine manufactured on or after January 1, 2007.

(26) Engine Compartment Fire Suppression System: An automatic fire suppression system may be installed. If installed, the fire suppression system shall:

(a) Be located in the engine compartment on buses and be automatically activated when the fire detector has detected a fire in the engine compartment. The system shall also include a mechanism for activation by the driver;

(b) Have nozzles for fire suppression that shall be located under the school bus, in the electrical panel and under the dashboard, but not in the passenger compartment.

(c) Include a lamp or buzzer to alert the driver when the system has been activated; and

(d) Meet the SP Technical Research Institute of Sweden (SP) P-Mark certification standard.

(27) Exhaust System:

(a) The exhaust pipe, muffler, and tailpipe shall be outside bus body compartment and attached to chassis so any other chassis component is not damaged;

(b) Tailpipe and after-treatment system shall be constructed of a corrosion-resistant tubing material at least equal in strength and durability to 16-gauge steel tubing of equal diameter;

(c) Tailpipe shall meet one of the following options:

(A) Tailpipe may exit in the rear of the bus provided it:

(i) Does not create a hand hold.

(ii) Does not create a step.

(iii) Exhaust is defused away from passenger compartment.

(iv) Exits to the left or the right of the emergency exit door.

(B) Tailpipe may extend to, but not beyond the body limits on the left side of the bus forward or rearward of the rear tires outboard of chassis centerline. If the tailpipe terminates forward of the rear tires it shall terminate not more than 24 inches or less than 6 inches forward of rear tires. No tailpipe shall terminate beneath any emergency exit or fuel fill receptacle;

(C) Tailpipe shall not exit the right side of the vehicle.

(d) Exhaust system shall be properly insulated from fuel tank and connections by securely attached metal shield at any point where it is 12 inches or less from tank or tank connections;

(e) Muffler shall be constructed of corrosion-resistant material;

(f) The design of an after-treatment system shall not allow active (non-manual) regeneration of the particulate filter during the loading and unloading of passengers. Manual regeneration systems will be designed such that unintentional operation will not occur; and

(g) For after-treatment systems that require Diesel Exhaust Fluid (DEF) to meet federally mandated emission standards:

(A) The composition of DEF must comply with ISO 22241-1; and

(B) The DEF supply tank shall be sized to meet a minimum ration of three diesel fills to one DEF fill.

(28) Fenders, Front:

(a) Total spread of outer edges of front fenders, measured at fender line, shall exceed total spread of front tires when front wheels are in straight-ahead position;

(b) When equipped, front fenders shall be properly braced and free from any body attachments.

(29) Floor:

(a) Floor in under seat area, including tops of wheel housing, driver's compartment and toe board, shall be covered with rubber floor covering or equivalent having minimum overall thickness of .125 inch:

(A) Floor covering in aisle shall be of aisle-type fire-resistant rubber or equivalent, wear-resistant and ribbed or equivalent non-slip material. Minimum overall thickness shall be .1875 inch measured from tops of ribs;

(B) Floor covering shall be permanently bonded to floor and shall not crack when subjected to sudden changes in temperature. Bonding or adhesive material shall be waterproof and shall be of type recommended by manufacturer of floor-covering material. All seams shall be sealed with waterproof sealer.

(b) Edge of floor at step well shall be treated as a step edge and shall be protected as required in section (69)(f)(C) of this rule;

(c) A vapor and liquid proof inspection plate provided for access to the fuel tank sending may be installed;

(d) A subfloor of 5-ply plywood, at least 1/2-inch nominal thickness or equivalent for type A buses and 5/8-inch nominal thickness or equivalent for all other buses, shall be installed over the standard school bus floor. Plywood shall equal or exceed properties of exterior grade C-C plywood as specified in NIST PS 1. Floor shall be level from front to back and from side to side except for wheel housing, toe board and driver's seat platform areas;

(e) Plywood sub-floor may be replaced with an equivalent material provided it has equal or greater insulation R-value, sound abatement, deterioration-resistant, and moisture-resistant properties.

(30) Frame:

(a) Frame shall be of such design and strength characteristics as to correspond at least to standard practice, for trucks of same general load characteristics which are used for highway service;

(b) Any secondary manufacturer that modifies the original chassis frame shall guarantee the performance of workmanship and materials resulting from such modification;

(c) Any frame modification shall not be for the purpose of extending the wheelbase;

(d) Holes in top or bottom flanges of frame side rail shall not be permitted except as provided in original chassis frame. There shall be no welding to frame side rails except by chassis manufacturer;

(e) Frame lengths shall be established in accordance with the design criteria for the complete vehicle.

(31) Fuel System:

(a) The following fuels may be used:

(A) Diesel, including biodiesel blends,

(B) Gasoline, including ethanol blends,

(C) Liquefied Petroleum Gas (LPG),

(D) Compressed Natural Gas (CNG),

(E) Dual fuel systems using any combination of (A) through (D) above, provided that the system:

(i) Meets Environmental Protection Agency specifications;

(ii) Meets vehicle manufacture specifications; and

(iii) Has been approved by the Oregon Department of Education.

(F) Other fuels may be approved by the Oregon Department of Education upon request.

- (b) Buses with a capacity of 57 or less shall be equipped with one or more fuel tanks that provide a combined liquid capacity of not less than 25 gallons.
- (c) Buses with a capacity of 58 or more shall be equipped with one or more fuel tanks that provide a combined liquid capacity of not less than 60 gallons.
- (d) The actual draw capacity of each fuel tank shall be a minimum of 83 percent of the tank capacity.
- (e) No portion of the fuel system, which is located outside of the engine compartment, except the filler tube, shall extend above the top of the chassis frame rail. Fuel lines shall be mounted to obtain maximum possible protection from the chassis frame;
- (f) Fuel filter with replaceable element shall be installed between fuel tank and engine;
- (g) Tank(s) shall be mounted, filled and vented outside of body. The tank(s) location shall not permit fuel spillage to drip or drain on any portion of the exhaust system.
- (h) Liquefied Petroleum Gas (LPG) systems shall comply with National Fire Protection Association (NFPA) 58, Liquefied Petroleum Gas Code.
- (32) G.P.S. Navigation: A G.P.S. navigation unit may be installed. The unit shall not block any windows, gauges or indicator lights that are required. Portable units shall use an installed 12-volt power port.
- (33) Governor:
- (a) An electronic engine speed limiter shall be provided and set to limit engine speed, not to exceed the maximum revolutions per minute, as recommended by the engine manufacturer.
- (b) When it is desired to limit road speed, a road-speed governor should be installed;
- (34) Heaters and Air Conditioners:
- (a) At least one heater of hot water type shall be required;
- (b) If only one heater is used, it shall be of fresh-air or combination fresh-air and recirculation type;
- (c) If more than one heater is used, additional heaters may be of recirculation air type;
- (d) The heating system shall be capable of maintaining throughout the bus a temperature of not less than 50 degrees Fahrenheit at average minimum January temperature as established by the National Weather Service, for the area in which the vehicle is to be operated;
- (e) All heaters shall bear a name plate which shall indicate the heater rating in accordance with SBMTC Standard No. 001, said plate to be affixed by the heater manufacturer which shall constitute certification that the heater performance is as shown on the plate;
- (f) Heater hoses shall be adequately supported to guard against excessive wear due to vibration. The hoses shall not dangle or rub against the chassis or sharp edges, and shall not interfere with or restrict the operation of any engine function. Heater hose shall conform to SAE J20c. Heater hoses on the interior of the bus shall be shielded to prevent scalding of the driver or passengers;

(g) Each hot water heater system installed by a body manufacturer shall include a shutoff valve installed in the pressure and return lines near the engine in an accessible location. There shall be a water flow regulating valve or airflow regulating door for the front heater installed for convenient operation by the driver while seated;

(h) Return heater lines on body company installed heaters shall be equipped with bleeder valves in an accessible location to allow for removal of heater line air;

(i) Auxiliary fuel-fired combustion heating systems may be installed, provided that:

(A) The auxiliary heating system shall be marked plainly with certification stating, "Meets FMCSA Bus Heater Requirements"

(B) The auxiliary heating system shall utilize the same type of fuel as specified for the vehicle engine;

(C) The auxiliary heating system may be direct, hot air-type or may be connected to the engine coolant system;

(D) When connected to the engine coolant system, the auxiliary heating system may be used to preheat the engine coolant or preheat and add supplementary heat to the heating system, or both;

(E) Auxiliary heating systems shall be installed pursuant to the manufacturer's recommendations outside of the passenger compartment;

(F) Exhaust from auxiliary heating system shall not exit the right side of the bus;

(G) Installation of auxiliary heating system shall not compromise the requirements of Title 49 CFR Part 579.301 Fuel System Integrity.

(j) Portable heaters shall not be used.

(k) buses manufactured after January 1, 2026 used to transport students with special needs shall be built to include both heating and air conditioning systems.

(35) Horn: Bus shall be equipped with horn or horns of standard make, each horn capable of producing complex sound in bands of audio frequencies between approximately 250 and 2,000 cycles per second and tested per SAE Standard J-377.

(36) Identification:

(a) School buses shall bear the words "SCHOOL BUS" in black capital series letters at least eight inches high and of proportionate width on both front and rear of bus. Lettering shall be placed as high as possible without impairment of its visibility. The background shall be a maximum of 12 inches by 36 inches and shall be either:

(A) Retroreflective material that conforms to the retroreflectivity requirements of section (59); or

(B) Illuminated.

(b) A warning sign shall be installed on the rear of all school buses calling attention to the school bus stop law. It shall be located in the most attainable vertical center of the rear emergency door, between the

upper and lower windows. Signs on rear engine transit type buses shall be vertically centered and horizontally adjacent to the left and right upper brake lights. Sign shall be either:

(A) A decal with white retroreflectorized letters that conforms to the retroreflective requirements listed in section (59) of this rule mounted on a flat black background. The word message shall be centered horizontally and vertically on the decal. The decal shall have the lettering shown below:

UNLAWFUL TO PASS (3 inches in height)

WHEN (1 inches in height)

RED LIGHTS FLASH (3 inches in height) or:

(B) An electronic sign that displays warning messages to motorists. The electronic sign:

(i) Shall be sealed weather tight construction approximately 23.5 X 8.75 X 1.5 in size.

(ii) Shall be connected to the school bus safety lights;

(iii) Shall alternately flash the word message "CAUTION" and the word message "STOPPING" when the amber school bus safety lights are active. The letters in the word messages shall be amber with a minimum height of three inches;

(iv) Shall alternately flash the word message "STOP" and the word message "DO NOT PASS" when the red school bus lights are active. The letters in the word messages shall be red with a minimum of three inches;

(v) May flash or display the word message "CAUTION" or the word message "CAUTION STOPPING" when the hazard lights are activated. The letters in the word message shall be amber with a minimum height of three inches;

(vi) May flash or display the word message "CAUTION" when the backup lights are activated. The letters in the word message shall be amber with a minimum height of three inches;

(vii) Shall have a minimum viewing angle of 15 degrees on each side of the perpendicular axis;

(viii) Flashing messages may be controlled by the hazard light and school bus safety light flashers;

(ix) Word and picture messages shall be clearly visible in direct sunlight from a distance of 500 feet along the axis of the vehicle; and

(x) L.E.D. lights, if used, shall be of sufficient quantity to result in a clear and legible message.

(C) An electronic sign that displays warning messages to motorists may be placed on the front of the bus provided that:

(i) There is an electronic sign on the back of the bus per section (B) above;

(ii) The sign shall only be wired to the amber and red bus safety lights; and

(iii) The sign shall be mounted below the windshield, vertically centered.

(D)(i) If a Stop Arm Camera system as described in section (11) is installed, the warning sign shall include a decal that shall have the lettering shown below in white retroreflectorized letters that conforms to the retroreflective requirements listed in section (59) of this rule mounted on a flat black background:

CAMERA IN USE (3 inches in height)

(ii) If space will not permit this lettering below the other three required lines of text, it may be applied below the rear door window.

(c) The name of the school district, private school, or parochial school, and contractor name if applicable, shall be placed on the left and right sides of the bus. The name shall appear in the area directly below the side windows and the letters and figures in the name shall not be less than four inches nor more than seven inches in height and of proportionate width;

(d) School team name or contractor's insignia may be placed above the side windows on the front portion of the bus body. All such lettering must be approved by the Pupil Transportation Section of the Oregon Department of Education;

(e) One bus identification number at least four inches in height shall be placed on a flat vertical surface on each side and on the front and rear of the bus. At least one complete bus identification number shall be visible from any point 50 feet from the bus. Type A-1 and A-2 bus numbers may be three inches in height.

(f) Only signs and lettering approved by state law or by the regulations of the Department of Education shall appear on the inside or outside of a school bus.

(g) Optional identification and lettering may be added to the vehicle as outlined below:

(A) Bus identification number on top of the bus. Numbers shall be black and a minimum of 12 inches high;

(B) The location of the battery(ies) identified by the word "BATTERY" or "BATTERIES" in black letters on the battery compartment door in 2-inch capital series letters;

(C) Manufacture or dealer identification or logos. Placement must be approved by the Pupil Transportation Section of the Oregon Department of Education;

(D) Identification of fuel type on or adjacent to the fuel filler opening in 2-inch black capital series letters;

(E) Symbols, letters, or numbers not to exceed 64 square inches of total display near the entrance door, displaying information for identification by the students of the bus or route served;

(F) Buses designed and used for transporting children with special needs shall display the International Symbol of Accessibility below the window line. Such emblems shall be white on blue or black background, shall not exceed 12 inches square in size and shall be of a high-intensity retroreflective material meeting the requirements of Federal Highway Administration (FHWA) FP-85, Standard Specifications for construction of Roads and Bridges on Federal Highway Projects. Emblems (3) shall be located as follows: one on the front, one on the rear of the bus body or bumper, and one on the special service entrance. ~~may display universal handicapped symbols located near service entrance door and at the rear of the vehicle below the window line. Such emblems shall be white on blue, shall not exceed 12 inches square in size, and may be reflectorized.~~

(37) Inside Height:

(a) Clear inside body height for type A-1 buses shall be a minimum of 62 inches measured at any point on the longitudinal center line from the front vertical bow to the rear vertical bow.

(b) Clear inside body height for all other buses shall be a minimum of 72 inches measured at any point on the longitudinal center line from front vertical bow to rear vertical bow.

(c) Height requirements do not apply to air conditioning units installed in the passenger compartment when installed to manufacturer's specifications.

(38) Instruments, Gauges, and Indicators:

(a) Bus shall be equipped with the following instruments and gauges. (Telltale warning lights in lieu of gauges are not acceptable except as noted:

(A) Speedometer;

(B) Odometer, which will give accrued mileage including tenths of miles;

(C) Voltmeter: A graduated charge and discharge ammeter compatible with generating capacities is permitted in lieu of or in addition to a voltmeter;

(D) Oil-pressure gauge;

(E) Water temperature gauge;

(F) Fuel gauge;

(G) High beam headlight indicator light;

(H) Air pressure or vacuum gauge according to brake system used: Light indicator or gauge required on vehicle equipped with hydraulic-over hydraulic brake system;

(I) Turn signal indicator light;

(J) Tachometer on type B, C, or D buses. Tachometer is optional on Type A buses;

(K) Glow plug indicator light, where appropriate;

(L) Fog light indicator, if fog lights are installed;

(M) Bus safety light pilot lamps / monitors: Each bus shall be equipped with 2 illuminated pilot lamps, one amber and one red. The placement of these lamps shall be in accordance with other telltale light placement requirements in 49 CFR 571.101 Controls and Displays. Pilot lamps shall provide an unmistakable indication that the flasher system is operating and an unmistakable indication if any lamp is not operating or the system is not otherwise functioning normally.

(b) All instruments shall be easily accessible for maintenance and repair;

(c) Above instruments and gauges shall be mounted on instrument panel in such a manner that each is clearly visible to and lies within a 140-degree field of vision for a 95th percentile female anthropomorphic dummy while in normal seated position. Items installed after manufacture shall not block the view of any instrument or gauge listed above.

(d) Instrument panel shall have lamps of sufficient candlepower to illuminate all instruments and gauges and shift selector indicator for automatic transmission.

(e) All control and indicator lights shall be dimmable except telltale lights. Control and indicator lights may be controlled by one or two dimmer switches.

(39) Insulation:

(a) Ceiling and walls shall be insulated with proper material to deaden sound and to reduce vibration to a minimum.

(b) Thermal insulation that is fire-resistant, non-water absorbing, UL approved, with a minimum R-value of 5.5 shall be installed in the ceiling and walls;

(c) If floor insulation is desired it shall be installed in accordance with the floor section of this rule.

(40) Interior:

(a) Interior of bus shall be free of all projections, including but not limited to luggage/book racks or attendant hand holds, that can cause injury in the event of a collision or rollover. Padded and full enclosed overhead storage above the seating area is allowed.

(b) The ceilings and walls shall have an inner lining.

(c) If ceiling is constructed with lap joints, forward panel shall be lapped by rear panel and exposed edges shall be beaded, hemmed, flanged or otherwise treated to minimize sharp edges;

(d) Buses shall assure noise level taken at the ear of the occupant nearest to the primary vehicle noise source shall not exceed 85 DBA when tested according to the Noise Test Procedure.

(41) Lamps and Signals:

(a) All lamps, signals, and reflectors shall comply with the design and performance requirements of FMVSS No. 108, Lamps, reflective devices, and associated equipment; Oregon Revised Statutes, Chapter 816, Vehicle Equipment: Lights; and Oregon Administrative rules, Chapter 735, Division 108, Lighting Equipment applicable to that type of lamp, signal or reflector.

(b) The following lights shall be installed with any additional requirements listed:

(A) Back-up lamps: The bus shall be equipped with 2 white rear back-up lamps that have a minimum illuminated area of 12 square inches. If back up lamps are placed in the same horizontal line as the tail-stop lamps and turn signal lamps, they shall be to the inside.

(B) Back-up warning alarm: An automatic audible alarm shall be installed on the rear of the bus that complies with SAE 994 Back-Up Alarm Standard specifying a minimum of 97±4db(A).

(C) Bus Safety Lights:

(i) Shall have red and amber flashing lights installed in accordance with SAE Standard J887. Each amber light shall be located near each red signal lamp, at the same level, but closer to the vertical centerline of the bus.

(ii) The area around each lens of the bus safety lights shall be painted black, extending outward a minimum of 3 inches where practicable.

(iii) The front bus safety lights shall be visible either directly or indirectly from inside the bus.

(iv) A separate fuse or circuit breaker, adequate to prevent damage to the system in the event of a short circuit, shall be provided between the power source and flasher system.

(v) The system shall be wired so that the system is activated by a manually operated spring-loaded switch that is clearly labeled and distinguishable from other switches.

(vi) A circuit master switch, if installed, shall be part of the activation switch outlined in subparagraph (v) of this paragraph.

(vii) Buses equipped with power-controlled entrance doors may have an additional spring loaded switch that will activate the red school bus safety lights prior to opening the entrance door or keep the red bus safety lights on after closing the entrance door.

(viii) The flashing mechanism shall be capable of carrying the full current load of the signal system.

(ix) Each lamp shall have a minimum illumination area of 38 square inches, flash a minimum of 60 times per minute, and be clearly visible in direct sunlight from a distance of 500ft along the axis of the vehicle.

(x) The Bus Safety Light System shall operate as follows:

(I) The bus safety light activation switch shall activate the amber safety lights when the entrance door is closed or red safety lights when the entrance door is open;

(II) When amber safety lights are activated, they shall automatically deactivate and the red safety lights shall automatically activate when the entrance door is opened; door switch shall not have more than two positions to open or close door;

(III) Once active, the red safety lights shall automatically deactivate when the entrance door is closed; No bus safety lights shall activate when the entrance door is opened without first pressing the bus safety light activation switch;

(IV) The amber bus safety lights and red bus safety lights shall not flash at the same time.

(V) There shall be a canceling switch that will deactivate the bus safety lights and activation sequence if they are accidentally activated or if the driver discovers there is no need to make a stop after activating the switch.

(D) Clearance lamps;

(E) Headlamps;

(F) Identification Lamps;

(G) Fog lamps may be installed:

(i) Fog lamps shall be mounted symmetrically around the front centerline of the bus, below the headlights not less than 12 inches, no more than 30 inches above the ground;

(ii) Fog lamps shall be wired to a separate switch and pilot light and shall only come on when the low beam head lights are on.

(H) Interior dome lamps: Interior lamps shall be provided which will adequately illuminate interior aisles. There shall be at least one interior lamp for every two rows of passenger seats. One or two rear dome lamp(s) shall be wired through a separate switch unless there are less than five rows of seats.

(I) Reflectors;

(J) Side Marker Lamps;

(K) Step well Lamp: A step well lamp shall be provided which will adequately illuminate the entire step well. The lamp circuit shall be wired through the headlamp or clearance lamp system and shall be activated only when the door is opened.

(L) Strobe Lamp: A white flashing strobe lamp may be installed on the longitudinal center of the roof on the rear third of the bus, but no closer than one foot from the rear of the bus.

(i) The lamp shall have a single clear lens emitting light 360 degrees around its vertical axis and may not extend above the roof more than 6-1/2 inches, or exceed maximum legal vehicle height.

(ii) The lamp shall have a separate switch and be wired through the vehicle hazard lamp system. A pilot lamp to indicate when the light is in operation is required.

(M) Tail lamps & Stop lamps: Buses shall be equipped with four combination red tail-stop lamps.

(i) Two combination lamps with a minimum 38 square inches of illuminated area shall be mounted immediately inside of, and in line with, the rear turn signal lamps.

(ii) Two combination lamps with a minimum 12 square inches of illuminated area shall be placed on the rear of the bus between the beltline and the floor line. The horizontal centerline of the lights shall be a maximum of 12 inches above the floor line. The beltline shall be defined as the horizontal section defined by the lower edges of the passenger windows and the top of the seat cushion-level rub rail.

(iii) Stop lamps shall be activated by the service brakes and shall emit a steady light when illuminated.

(N) Turn Signals:

(i) Front signals shall either:

(I) have a minimum illuminated area of 38 square inches; or

(II) be manufacturer's standard front turn signals for Type A.

(ii) Rear signals shall have a minimum illuminated area of 38 square inches and be placed as wide apart as practical with the horizontal centerline a maximum of 12 inches below the rear window.

(iii) Side signals: A turn signal lamp with a minimum of 4 candlepower shall be mounted on each side of the bus at approximately seat level height, located to the rear of the entrance door on the right side, and to the rear of the stop arm on the left side. Side turn signals should be in approximately the same location on each side of the bus. Additional side turn signals may be installed if the horizontal centerline is the

same for all side turn signals, and additional signals are in the same approximate location on each side of the bus.

(iv) All turn signal lamps shall be amber in color.

(v) All turn signal lamps shall be independent units and connected to turn signal switch and four-way hazard warning switch that will cause all turn signals to flash simultaneously.

(42) Metal Treatment:

(a) All metal used in construction of bus body shall be zinc- or aluminum-coated or treated by equivalent process before bus is constructed. Included are such items as structural members, inside and outside panels and floor sills; excluded are such items as door handles, grab handles, interior decorative parts and other interior plated parts;

(b) All metal parts that will be painted shall be (in addition to above requirements) chemically cleaned, etched, zinc-phosphate coated and zinc-chromate or epoxy primed or conditioned by equivalent process;

(c) In providing for these requirements, particular attention shall be given lapped surfaces, welded connections of structural members, cut edges, punched or drilled hole areas in sheet metal, closed or box sections, un-vented or un-drained areas and surfaces subjected to abrasion during vehicle operation;

(d) As evidence that above requirements have been met, samples of materials and sections used in construction of bus shall be subjected to a cyclic corrosion testing as outlined in SAE J1563.

(43) Mirrors:

(a) Exterior Mirror Systems:

(A) Bus shall be equipped with mirror systems complying with 49 CFR Part 571, FMVSS 111 as adopted by the National Highway Traffic Safety Administration for December 3, 1993 implementation, plus all applicable standards specified in this rule;

(B) Manufacturer shall certify compliance with mirror and direct/indirect visibility standards listed in the aforementioned FMVSS 111.

(C) Crossover mirrors may be equipped with a lighting system that illuminates the ground where passengers would walk in front of the vehicle, provided that the lighting system does not direct light toward other road users.

(b) Interior Mirror:

(A) Interior mirror shall be either laminated or tempered. Mirror shall be a minimum of 6" x 30". Mirror shall have rounded corners and protected edges;

(B) Type A buses shall be equipped with a mirror that is 6" x 16" or providing at least 96 square inches of flat mirror surface;

(C) Bus seller shall certify compliance with mirror and direct/indirect visibility standards listed in the aforementioned FMVSS 111 and provide a copy to used bus purchasers when certification is not available from manufacturer for all buses manufactured prior to January 1, 1994.

(44) Mobile Data Terminal (MDT): A school bus may be equipped with a MDT which meets all of the following specifications:

(a) The MDT shall be installed so that it does not block any windows, mirrors, operational controls, gauges, or telltale indicator lights.

(b) Unless used as a navigation aid, the MDT display shall be blank anytime that:

(A) The vehicle transmission is not in the park position, or for a vehicle that does not have a park position, anytime that the vehicle is not in neutral and the parking brake is not engaged; or

(B) The bus safety lights are operating

(c) If used as a navigation aid, the MDT may display a map of the route instead of a blank display when required.

(d) The MDT shall not accept driver input or other interaction at any time that the screen is to be blank or displaying a map as required in this section.

(45) Mounting:

(a) Chassis frame shall support rear body cross member. Bus body shall be attached to chassis frame at each main floor sill, except where chassis components interfere, in such a manner as to prevent shifting or separation of body from chassis under severe operating conditions;

(b) Body front shall be attached and sealed to chassis in such manner as to prevent entry of water, dust or fumes through joint between chassis cowl and body;

(c) When floor is provided by bus body manufacturer, adequate insulating padding shall be placed at all contact points between body and chassis frame. Insulating material shall be approximately 1/4-inch thick and shall be so attached as to prevent movement under severe operating conditions.

(46) Mud Flaps:

(a) Mud flaps or splash aprons are required for rear wheels on all school buses;

(b) Flaps shall be of heavy-duty rubberized material or equivalent and shall extend at least the full width of tires from a point above the center of the tires to a point not more than ten inches above the surface of the highway when such vehicle is empty.

(47) Oil Filter: Oil filter of replaceable element or cartridge type shall be provided and shall be connected by flexible oil lines if it is not built-in or engine mounted design. Oil filter shall have a capacity in accordance with the engine manufacturer's recommendation.

(48) Openings: All openings in floorboard or firewall between chassis and passenger-carrying compartment, such as for gearshift lever and parking brake lever, shall be sealed. Access plates to cover openings shall have adequate gaskets and be fastened securely.

(49) Overall Length: Maximum length for school buses shall be limited to 45 feet.

(50) Overall Width: Overall width of bus shall not exceed 8.5 feet. The mirrors may exceed the maximum allowable width by a distance of not greater than five inches on each side of the vehicle.

(51) Overhang: Body shall be so mounted as to comply with requirements described in chassis weight distribution standard. Body length extending beyond the rear axle shall not exceed three-fourths the length of the vehicle's wheel base per Oregon Vehicle Code.

(52) Passenger Load:

(a) Actual gross vehicle weight (GVW) is the sum of the chassis wet weight, plus the body weight, plus the driver's weight, plus total seated pupil weight:

(A) For purposes of calculation, the driver's weight is 250 pounds;

(B) For purposes of calculation, the pupil weight is 120 pounds per pupil.

(b) Actual gross vehicle weight (GVW) shall not exceed the chassis manufacturer's gross vehicle weight rating (GVWR) or gross axle weight rating (GAWR) for the chassis;

(c) Manufacturer's gross vehicle weight rating and other chassis information shall be furnished by the manufacturer, the manufacturer's representative or seller to the Oregon Department of Education on forms furnished by the department.

(53) Power and Gradeability: Gross vehicle weight (GVW) shall not exceed 165 pounds per net published horsepower of the engine at the manufacturer's recommended maximum number of revolutions per minute.

(54) Power Lift: A power lift may be installed

(a) Vehicle lifts and installations shall comply with the public use lift requirements set forth in 49 CFR 571.403, Platform Lift Systems for Motor Vehicles, and 49 CFR 571.404, Platform Lift Installations in Motor Vehicles. This rule change applies to buses manufactured after December 27, 2004.

(b) Lifting mechanism shall be located on the right side of the bus and be capable of lifting a minimum load of 800 pounds;

(c) When the platform is in the fully upright position, it shall be locked in position mechanically by means other than a support, or lug in the door;

(d) Controls shall be provided that enable the operator to activate the lift mechanism from either inside or outside of the bus. There shall be a means of preventing the lift platform from falling while in operation due to a power failure. If equipped with a control switch flex cord, the cord shall be installed to minimize entanglement with lift mechanism;

(e) Power lifts shall be so equipped that they may be manually raised and lowered in the event of power failure of the power lift mechanism;

(f) Lift travel shall allow the lift platform to rest securely on the ground;

(g) All edges of the platform shall be designed to restrain wheelchair and operator's feet from being entangled during the raising and lowering process;

(h) Lift platform shall have a minimum usable area of 30 inches by 48 inches;

(i) Platform shall be fitted on both sides with full width barriers which extend above the floor line of the lift platform;

(j) A restraining device shall be affixed to the outer edge (curb end) of the platform that will prohibit the wheelchair from rolling off the platform when the lift is in any position other than fully extended to ground or desired platform level. Minimum height of device/barrier shall be four inches;

(k) A self-adjusting, skid resistant plate shall be installed on the outer edge of the platform to minimize the incline from the lift platform to the ground level. This plate, if so designed, may also suffice as the restraining device described in subsection (h) of this section. The lift platform must be skid resistant;

(l) A circuit breaker or fuse shall be installed between power source and lift motor if electrical power is used;

(m) The lift mechanism shall be equipped with adjustable limit switches or bypass valves to prevent excessive pressure from building in the hydraulic system when the platform reaches the full up position or full down position;

(n) Sharp corners or projections of the lift which are likely to cause injury to passengers in the event of a collision or rollover shall be padded with impact absorbing material;

(o) There shall be no exposed areas on lift mechanism or adjacent to lift that could cause injury to children while lift is in motion;

(p) Power unit for lift shall be located so as not to restrict or impair center aisle space or foot and leg room between seats;

(q) If body floor section serves as a portion of the lift platform, the adjacent under-floor areas on three sides shall be closed off with shields when platform is in the lowered position;

(r) Platform shall be confined within the perimeter of the school bus body when not extended, in no way attached to the exterior sides of the bus.

(55) Racks: The installation of any kind of exterior luggage rack outside the bus is prohibited. This does not prohibit enclosed luggage compartments.

(56) Radios and Public Address Systems:

(a) Buses shall be equipped with a public address system having interior and exterior speakers and a switch to separate inside and outside speaker systems.

(b) AM/FM/audio radio may be installed.

(c) Interior speakers mounted in the ceiling panels or side panels shall be either flush mounted or may protrude not more than 1-1/2 inches if the speaker housing is free of any corners or projections which can cause injury by striking with the head or in the event of a collision or rollover. Speakers protruding more than 1-1/2 inches may be mounted in the vertical end panels above the windshield or back windows as long as speakers are free of corners or projections that could cause injury;

(d) Speakers shall not be placed above any aisle or within four feet of the driver's seat back in its rearmost upright position;

(57) Ramps: a ramp may be installed on Type A buses:

- (a) Ramp shall utilize a special service entrance located on the right side of the bus that is not less than 30 inches in width;
- (b) Ramp shall be of sufficient strength and rigidity to support wheelchair, occupant and attendant. It shall be equipped with protective flange on each longitudinal side to keep wheelchair on ramp;
- (c) Floor of ramp shall be covered with nonskid material;
- (d) Ramp shall be of weight, and equipped with handle(s), to permit one person to put ramp in place and return it to storage place;
- (e) Provisions shall be made to secure ramp to side of bus for use without danger of detachment, and ramp shall be connected to bus at floor level in such manner as to permit easy access of wheels on wheelchair to floor of bus;
- (f) Ramp shall be at least 80 inches in length, and width of the ramp shall be adequate to accommodate wheelchairs up to 30 inches wide. Ramp shall be of one piece, or two 40-inch sections hinged to allow for storage;
- (g) Dustproof and waterproof enclosed container shall be provided.
- (h) Ramp shall not be stored in the passenger compartment.

(58) Retarder System: Retarder system, if installed, shall maintain the speed of the fully loaded school bus at 19.0 MPH on a seven percent grade for 3.6 miles without incurring damage to the retarder or vehicle.

(59) Retroreflective Material and Placement:

(a) Red: when used or required, red retroreflective material shall meet or exceed ASDM D4956 standards for type V super high-intensity sheeting and have a coefficient of retroreflection equal to or greater than:

- (A) 120 for an observation angle of 0.2 degrees and a light entrance angle of -4 degrees; and
- (B) 72 for an observation angle of 0.2 degrees and a light entrance angle of +30 degrees; and
- (C) 28 for an observation angle of 0.5 degrees and a light entrance angle of -4 degrees; and
- (D) 13 for an observation angle of 0.5 degrees and a light entrance angle of +30 degrees;

(b) White: when used or required, white retroreflective material shall meet or exceed ASDM D4956 standards for type V super high-intensity sheeting and have a coefficient of retroreflection equal to or greater than:

- (A) 700 for an observation angle of 0.2 degrees and a light entrance angle of -4 degrees; and
- (B) 400 for an observation angle of 0.2 degrees and a light entrance angle of +30 degrees; and
- (C) 160 for an observation angle of 0.5 degrees and a light entrance angle of -4 degrees; and

- (D) 75 for an observation angle of 0.5 degrees and a light entrance angle of +30 degrees;
- (E) Exception: white retroreflective material on the “unlawful to pass” sign shall meet or exceed ASDM D4956 standards for type I engineering grade sheeting and have a coefficient of retroreflection equal to or greater than:
- (i) 70 for an observation angle of 0.2 degrees and a light entrance angle of -4 degrees; and
 - (ii) 30 for an observation angle of 0.2 degrees and a light entrance angle of +30 degrees; and
 - (iii) 30 for an observation angle of 0.5 degrees and a light entrance angle of -4 degrees; and
 - (iv) 15 for an observation angle of 0.5 degrees and a light entrance angle of +30 degrees;
- (c) Yellow: when used or required, yellow retroreflective material shall meet or exceed ASDM D4956 standards for type V super high-intensity sheeting and have a coefficient of retroreflection equal to or greater than:
- (A) 470 for an observation angle of 0.2 degrees and a light entrance angle of -4 degrees; and
 - (B) 270 for an observation angle of 0.2 degrees and a light entrance angle of +30 degrees; and
 - (C) 110 for an observation angle of 0.5 degrees and a light entrance angle of -4 degrees; and
 - (D) 51 for an observation angle of 0.5 degrees and a light entrance angle of +30 degrees;
- (d) All retroreflective material shall maintain at least 50 percent of the coefficient of retroreflection for a minimum of six years.
- (e) Bumpers may be marked diagonally 45 degrees down to centerline of pavement with two-inch wide strips of black retroreflective material.
- (f) Rub Rails may have retroreflective black material.
- (g) The rear of the bus body shall be marked with strips of retroreflective yellow material that is a minimum of 1 inch and a maximum of 2 inches to outline the perimeter of the back of the bus. The horizontal strips shall be placed above the rear windows, and immediately above the bumper. Both horizontal strips shall extend to each rear corner of the bus. The vertical strips shall connect the two horizontal strips.
- (h) Each side of the bus shall be marked with yellow retroreflective material that extends for the entire length of the bus body and is either:
- (A) A background for the name of the school district identification required in section (36)(c) of this rule that is not less than 6 inches and not more than 12 inches in width; or
 - (B) A two-inch-wide strip that is between the beltline and the floor line;
- (i) Further retroreflective placement requirements can be found in: Emergency Exits (section 24 of this rule), Identification (section 36 of this rule), and Stop Arm (section 71 of this rule)
- (60) Rub Rails:

- (a) There shall be one rub rail on each side of bus at, or no more than 8 inches above, the seat cushion level which shall extend from rear side of entrance door completely around bus body (except for emergency door and access panel(s)) to point of curvature near outside cowl on left side;
- (b) There shall be one rub rail located 10 inches or less above the floor line which shall cover same longitudinal area as upper rub rail, except at wheel housing, and shall extend only to longitudinal tangent of right and left rear corners;
- (c) All rub rails shall be attached at each body post and all other upright structural members;
- (d) All rub rails shall be four inches or more in width, shall be of 16-gauge steel, suitable material of equivalent strength, and shall be constructed in corrugated or ribbed fashion;
- (e) All rub rails shall be applied to the outside body or outside body posts. Pressed-in or snap-on rub rails do not satisfy this requirement. For buses using rear luggage or engine compartment, rub rails need not extend around rear corners.
- (f) The bottom edge of the body side skirts shall be stiffened by application of a rub rail, or the edge may be stiffened by providing a flange or other stiffeners.

(61) Sanders and other traction assisting devices:

- (a) Sanders may be installed. When installed, sanders shall:

- (A) Be of hopper cartridge-valve type;
- (B) Have metal hopper with all interior surfaces treated to prevent condensation of moisture;
- (C) Be of at least 100 pound (grit) capacity;
- (D) Have cover on filler opening of hopper, which screws into place, sealing unit airtight;
- (E) Have discharge tubes extending to front of each rear wheel under fender;
- (F) Have no-clogging discharge tubes with slush-proof, nonfreezing rubber nozzles;
- (G) Be operated by electric switch with telltale light mounted on instrument panel;
- (H) Be exclusively driver-controlled.

- (b) Automatic traction chains may be installed.

(62) Seat Belts:

- (a) Driver's seat belt: A Type 2 seat belt shall be provided for the driver, a driver's seat with an integrated Type 2 seat belt may be substituted. Each belt section shall be booted to keep belt and the button or buckle type latch off floor when not in use. Shoulder belt assemblies on Type B, C, and D buses shall provide for a height adjustment of at least four inches at its upper point of attachment to the bus. Belt shall be anchored or guided in a manner at the seat frame to prevent the driver from sliding sideways when belt is in use. Locking retractors may be either an ELR (Emergency Locking Retractor) or an ALR (Automatic Locking Retractor). All ALR equipped buses received after July 1, 1989, must include an approved anti-cinching device;

(b) Passenger seat belts:

(A) On buses manufactured prior to October 21, 2011 with a GVWR of more than 10,000 pounds, Type 1 seat belts or Type 2 seat belts may be installed. The attachments, belts and installation shall meet the requirements of:

(i) 49 CFR 571.208 Occupant Crash Protection, 49 CFR 571.209 Seat Belt Assemblies, and 49 CFR 571.210 Seat Belt Assembly Anchorages, as they apply to school buses with a GVWR of 10,000 pounds or less; or

(ii) The voluntary Type 1 or Type 2 installation requirements outlined in 49 CFR 571.222 School Bus Passenger Seating and Crash Protection that take effect on October 21, 2011.

(B) On buses manufactured on or after October 21, 2011 with a GVWR of more than 10,000 pounds, Type 2 seat belts may be installed. Standards for voluntary installation of seat belts are outlined in 49 CFR 571.222 School Bus Passengers Seating and Crash Protection.

(C) On buses with a GVWR of 10,000 pounds or less, mandatory seat belt standards are outlined in 49 CFR 571.222 School Bus Passenger Seating and Crash Protection.

(63) Seats and Crash Barriers:

(a) Driver's seat shall be so located in relationship to the steering wheel that the driver may assume a natural position while driving, have a clear view of the road, and sufficient leg room to operate safely and effectively the brake and clutch pedals and accelerator without cramping or interference. Minimum distance between steering wheel and back rest of driver's seat shall be 11 inches. Driver's seat shall have a fore-and-aft adjustment of not less than four inches and shall on Type B, C, and D buses be capable of being raised and lowered at least three inches and shall be strongly attached to comply with acceptable installation procedures:

(A) For type B, C, and D buses, driver's seat shall be a high back (suspension) seat with a minimum seat back adjustment of 15 degrees, not requiring the use of tools, and with a head restraint to accommodate a 95th percentile female anthropomorphic dummy as defined in FMVSS 208. The driver's seat shall be secured with nuts, bolts, and washers or flanged-headed nuts. Type A buses may use manufacturer's standard driver's seat.

(B) Driver's seat positioning and range of adjustment shall be designed to accommodate comfortable actuation of the foot control pedal by 95 percent of the adult female population.

(b) Passenger Seats: In addition to the requirements of 49 CFR 571.222 School Bus Passenger Seating and Crash Protection, all passenger seats have the following requirements:

(A) All seats shall have minimum depth of 15 inches;

(B) In determining seating capacity of bus, the minimum allowable rump width shall be 13 inches;

(C) Seat, seat back cushion and crash barrier shall be covered with a material having a minimum 42-ounce finished weight, 54-inch width and finished vinyl coating of 1.06 broken twill, or other material with equal tensile strength, tear strength, seam strength, adhesion strength, resistance to abrasion, resistance to cold, and flex separation. Material shall meet or exceed the criteria contained in the School Bus Seat Upholstery Fire Block Test. (see Appendix);

(D) All seats shall be forward facing and shall be securely fastened to that part(s) of bus that support them with a nut-and-bolt type of fastener. Each seat leg shall be secured to the floor by a minimum of two nut-and-bolt type fasteners of at least grade 5 SAE strength. Sheet metal screw-type fasteners without a nut are not acceptable, except in areas where it is not possible to install a nut-and-bolt type fastener. Seats may be track mounted;

(E) If flexible track mounted seating is installed, the manufacturer shall supply minimum and maximum seat spacing dimensions on a label permanently affixed to the bus to notify end user of seat installation requirements.

(F) No bus shall be equipped with jump seats or portable seats. Flip-up seats at side emergency exit doors are allowed;

(G) Seat spacing shall not be less than 24 inches between the front of the back of each seat and the rear of the back of the seat immediately ahead, measured at the center of the seat. The seat upholstery may be placed against the seat cushion padding, but without compressing the padding, before the measurement is taken.

(64) Shock Absorbers: Bus shall be equipped with front and rear double-acting shock absorbers compatible with manufacturer's rated axle capacity at each wheel location.

(65) Side skirts shall be 2 inches above the horizontal line between the center of the front spindle to the center of the rear axle, or lower. Measurement shall apply to an unloaded school bus located on a flat, level surface.

(66) Special Service Entrance:

(a) Bus bodies may have a special service entrance constructed in the body to accommodate a power lift;

(b) The special service entrance shall be at any convenient point on the right of the bus and far enough to the rear to prevent the door(s) from obstructing the right front regular service door when open;

(c) The opening may extend below the floor through the bottom of the body skirt. If such an opening is used, reinforcements shall be installed at the front and rear of the floor opening to support the floor and give the same strength as other floor openings;

(d) Entrance shall be of sufficient width and depth to accommodate various mechanical lifts and related accessories as well as the lifting platform. The minimum clear opening width shall be adequate to accommodate the minimum platform defined in section (54) of this rule;

(e) Door posts and headers from entrance shall be reinforced sufficiently to provide support and strength equivalent to the areas of the side of the bus not used for service doors;

(f) A drip molding shall be installed above the opening to effectively divert water from entrance;

(g) A pad shall be placed at the top edge of the special service entrance that is at least three inches wide and one inch thick and shall extend the full width of the door opening.

(h) A single door or double door may be used for special service entrance;

(i) A single door shall be hinged to the forward side of the entrance. If double doors are used, the system shall be designed to prevent the door(s) from being blown open by the aerodynamic forces created by the

forward motion of the bus, and/or shall incorporate a safety mechanism to provide secondary protection should the primary latching mechanism(s) fail;

(j) All doors shall open outwardly;

(k) All doors shall be weather sealed;

(l) All doors shall have positive non-hitchable fastening devices to hold doors in the open position;

(m) All doors shall be weather sealed and on buses with double doors, they shall be so constructed that a flange on the forward door overlaps the edge of the rear door when closed;

(n) When manually operated dual doors are provided the rear door leaf shall have at least a one-point fastening device to the header. The forward mounted door shall have at least three-point fastening devices. One shall be to the header, one to the floor line of the body, and the other shall be into the rear door. These locking devices shall afford maximum safety when the doors are in the closed position. The door and hinge mechanism shall be of a strength that will provide for the same type of use as that of a standard entrance door;

(o) If optional power doors are installed the design shall permit manual release of the doors for opening and closing by the attendant from the platform inside the bus;

(p) Door materials, panels, and structural strength shall be equivalent to the conventional service and emergency doors. Color, rub rail extensions, lettering and other exterior features shall match adjacent sections of the body;

(q) Each door shall have windows set in a waterproof manner that are visually similar in size and location to adjacent non-door windows. Glazing shall be of the same type and tinting (if applicable) as standard fixed glass in other body locations;

(r) Door(s) shall be equipped with a device that will activate a green flashing signal located in the driver's compartment when door(s) is not securely closed and ignition is in "on" position;

(s) A switch shall be installed so that the lifting mechanism will not operate when the lift platform door(s) is closed;

(t) An interior light shall be placed to illuminate the area directly inside the special service door above the lift and be activated when the door is open. Circuit may be wired through step well light circuit.

(u) Buses equipped with special service entrance doors not currently in use for service to students with disabilities or power lift equipped, must assure that doors are in compliance with all requirements for right side emergency door, or all of the following:

(A) Be sealed and inoperable;

(B) Have no handles; and

(C) Have the words NOT AN EXIT placed in letters at least two inches high above the door on both the interior and exterior of the bus.

(67) Springs:

(a) Capacity of springs or suspension assemblies shall be commensurate with chassis manufacturer's gross vehicle weight rating;

(b) If rear springs are used, they shall be of progressive type. Front leaf springs shall have a stationary eye at one end and shall be protected by a wrapped leaf in addition to the main leaf.

(68) Steering Gear:

(a) Steering gear shall be approved by manufacturer and designed to assure safe and accurate performance when vehicle is operated with maximum load and at maximum speed;

(b) Steering mechanism that allows for external adjustment to correct for lost motion shall provide an accessible adjustment location;

(c) No changes shall be made in steering apparatus which are not approved by manufacturer;

(d) There shall be clearance of at least two inches between steering wheel and cowl, instrument panel, windshield, or any other surface;

(e) Power steering of the integral type is required;

(f) The steering system shall be designed to provide for means for lubrication of all wear-points, if wear points are not permanently lubricated.

(69) Steps:

(a) Service door entrance may be equipped with two-step or three-step step well. Risers in each case shall be approximately equal and shall not exceed 10 inches in height. When plywood floor is used on steel, differential may be increased by thickness of plywood used:

(A) First step at service door for type A-1, A-2, and B buses shall be not less than 10 inches and not more than 14 inches from ground, based on standard chassis specifications;

(B) Type C and D buses shall be equipped with a three-step step well. First step at service door shall not be less than 12 inches and not more than 16 inches from the ground based on standard chassis specifications.

(b) Steps shall be enclosed to prevent accumulation of ice and snow;

(c) Steps shall not protrude beyond side body line;

(d) Steps (if any) on Type A-1 and A-2 buses not manufactured originally as school buses may be chassis manufacturer's standard;

(e) At least one grab handle not less than 20 inches in length shall be provided to assist passengers during entry or egress in unobstructed locations inside doorway. Grab handle shall be designed, installed and maintained to minimize the opportunity for entanglement of passenger clothing and belongings.

(f) Step Treads:

(A) All steps, including floor line platform area, shall be covered with 3/16-inch rubber floor covering or other materials equal in wear resistance and abrasion resistance to top grade rubber;

(B) The step covering shall be permanently bonded to a durable backing material that is resistant;

(C) 3/16-inch ribbed or pebbled step tread shall have a 1-1/2-inch white or yellow nosing as integral piece without any joint;

(D) Rubber portion of step treads shall have the following characteristics:

(i) Special compounding for good abrasion resistance and high coefficient of friction;

(ii) Flexibility so that it can be bent around a 1/2-inch mandrel both at 130 degrees F and 20 degrees F without breaking, cracking or crazing;

(iii) Show a durometer hardness 85 to 95.

(E) Notwithstanding subsection (a) of this section, a spray on application type material may be used. Spray on material shall meet subsections (b) through (d) of this section. The material shall also be applied to the underneath exterior of the step treads if not otherwise covered by undercoating.

(70) Steps, Windshield Access: There shall be at least one folding step or recessed foothold and suitably located handles on each side of the front of the body for easy accessibility for cleaning the windshield and lamps except when windshield and lamps are easily accessible from the ground. Standard does not apply to chassis not originally manufactured as school buses.

(71) Stop Signal Arms: Buses shall be equipped with stop signal arms mounted in accordance with the following requirements:

(a) Shall be installed on the left side of the bus; the vertical center of the stop blade shall be at least seven inches but not more than 14 inches below the window line, on the first body post to the rear of the driver or as close as practicable;

(b) A wind guard or mechanism defaulting the stop signal arm to a retracted state when not activated shall be provided. All sheet metal parts shall be 16-gauge metal or heavier;

(c) All parts of the assembly that are not color specific in 49 CFR 571.131 School Pedestrian Safety Devices shall be painted black;

(d) Shall be equipped with two, four-inch, double faced alternating flashing red lamps to be mounted centered on the vertical centerline of the stop arm near the perimeter of the sign with a minimum of 12 inches spacing between lamp centers. Lamps shall be LED or strobe

(e) The stop arm and lamps shall be wired to the circuit of the flashing red warning lamps mounted on the front and rear of the bus and shall operate simultaneously with the red bus safety lamps. Override switch is prohibited;

(f) Shall be retroreflectorized on both sides meeting the Retroreflective Materials standard (57) of this rule.

(g) Shall be either air, vacuum, or electrically operated:

(A) Air operated stop arms:

(i) Air may be supplied from an air accessory tank or from the first (wet) tank;

(ii) If source is from the first (wet) tank a pressure protection valve shall be installed to prevent the tank air supply from falling below 60 pounds;

(iii) Stop arm system must have a pressure regulating valve;

(iv) All fittings shall be brass.

(B) Vacuum operated stop arms:

(i) Vacuum shall be supplied from a separate accessory tank. Tank shall be protected by a check valve;

(ii) All fittings shall be brass.

(72) Sun Visor: Interior adjustable sun visor, not less than 6 by 30 inches in size, shall be installed above windshield in position convenient for use by driver. If transparent visor is used, it shall be of such material so as not to prevent distinguishing between the colors of red and green traffic signals. Type A-1 and A-2 may be equipped with manufacturer's standard visor. Visor shall have protected edges.

(73) Throttle: The force required to operate the throttle shall not exceed 16 pounds throughout the full range of accelerator pedal travel.

(74) Tires and Rims:

(a) Tires and rims of proper size and tires with load rating commensurate with chassis manufacturer's gross vehicle weight rating shall be provided. The use of multi-piece rims and/or tube type tires shall not be permitted;

(b) All tires on new buses shall be of same size. Load range of tires shall meet or exceed the gross axle weight rating as required by 49 CFR 571.120 Tire Selection and Rims for Vehicles Other Than Passenger Cars, and as indicated on the manufacturer's data plaque;

(c) If bus is equipped with spare tire and rim assembly, it shall be of the same size and load range as those mounted on the vehicle;

(d) A spare tire, when carried, shall be suitably mounted in an accessible location outside passenger compartment. Type A-1, and A-2 buses may have spare tire securely mounted in the rear corner of passenger compartment;

(e) Recapped tires are prohibited on the front of the bus;

(f) regrooved tires are not permitted on any bus;

(g) Minimum tread depth on tires shall be:

(A) Front axle — 4/32 inch;

(B) Rear axle — 2/32 inch.

(h) Tread depth shall be measured as follows: The minimum depth in any two adjacent major grooves at three locations spaced approximately equally around the outside of the tire but not on wear indicators.

(75) Tool Compartment: A metal container of adequate strength and capacity for storage of tire chains, tow chains and such tools as may be necessary, may be provided. Container may be located inside or outside of passenger compartment. If inside, it shall have a cover and positive type latch to prevent opening in event of a severe impact or bus rollover, and shall be attached to the floor with a nut and bolt fastener, or may be securely attached to a seat frame under a seat. If tool compartment is outside, it shall be lockable.

(76) Tow Hooks: Type C and D buses shall have two front and rear tow hooks that have sufficient strength to pull or be pulled by another vehicle of the same GVWR. Tow hooks shall be installed in order that no permanent distortion to the body or chassis will result if the bus must be towed.

(77) Transmission:

(a) Transmission shall have an input torque capacity greater than maximum net torque developed by engine.

(b) When automatic or semi-automatic transmission is used, it shall provide for not less than three forward and one reverse speed. The shift selector, if applicable, shall provide a detent between each gear position when shift selector is not steering column mounted. Type C and D buses shall be equipped with a transmission temperature gauge.

(c) When manual transmission is used, second gear and higher shall be synchronized. A minimum of three forward speeds and one reverse shall be provided.

(d) Automatic transmissions incorporating a parking pawl shall have a transmission shifter interlock controlled by the application of the service brake to prohibit accidental engagement of the transmission. All non-park pawl transmissions shall incorporate a park brake interlock that requires the service brake to be applied to allow release of the parking brake.

(78) Trash container: When used, the trash container shall be secured by a holding device that is designed to prevent movement and to allow easy removal and replacement. It shall be installed in an accessible location in the driver's compartment, not obstruct passenger access to the entrance door and maintained to minimize the opportunity for entanglement of passenger clothing and belongings.

(79) Turning Radius:

(a) Chassis with a wheel base of 264 inches or less shall have a right and left turning radius of not more than 42 1/2 feet, curb to curb measurement;

(b) Chassis with a wheelbase of 265 inches or more shall have a right and left turning radius of not more than 44 1/2 feet, curb to curb measurement.

(80) Under carriage luggage compartments: Luggage compartments may be installed on the outside of the bus mounted below the floor level or in the rear of the bus. Access to compartments must be from the outside only. Compartment doors must have a positive retention to hold the doors open. Compartment doors must be lockable.

(81) Undercoating:

(a) The entire underside of the bus body, including floor sections, cross members and below floor-line side panels, shall be coated with rust-proofing material for which the material manufacturer has issued to the bus manufacturer a notarized certification that the materials meet or exceed all performance requirements of SAE J1959, Corrosion Preventive Compound, Underbody Vehicle Corrosion Protection;

(b) The undercoating material shall be applied to the material manufacturer's specifications, including application method and recommended film thickness, and shall show no evidence of voids in the cured film.

(c) The undercoating material shall not cover any exhaust components of the chassis.

(82) Ventilation:

(a) Body shall be equipped with suitable, controlled ventilating system of sufficient capacity to maintain proper quantity of air under operating conditions without opening of windows except in extremely warm weather;

(b) Static-type non-closable exhaust ventilation shall be installed in low-pressure area of roof.

(83) Weight Distribution:

(a) Weight distribution of fully loaded bus on level surface shall be such as to not exceed the manufacturer's front gross axle weight rating and rear gross axle weight rating;

(b) Weight distribution of fully loaded bus on level surface shall be such that no more than 75 percent of gross vehicle weight is on rear tires and no more than 35 percent is on front tires. Type B and D buses with engine inside front of body and entrance door ahead of front wheels shall have no more than 75 percent of gross vehicle weight on rear tires, no more than 50 percent on front tires. If entrance door is behind front wheels, no more than 75 percent of gross vehicle weight shall be on rear tires, no more than 40 percent on front tires. With engine in rear, no more than 75 percent of gross vehicle weight shall be on rear tires, no more than 40 percent on front tires.

(84) Wheel housing:

(a) The wheel housing opening shall allow for easy tire removal and service;

(b) Wheel housing shall be attached to floor sheets in such a manner as to prevent any dust, water or fumes from entering the body. Wheel housing shall be constructed of 16-gauge steel, or other material of equal strength;

(c) The inside height of the wheel housing above the floor line shall not exceed 12 inches;

(d) The wheel housing shall provide clearance for installation and use of tire chains on single and dual (if so equipped) power-driving wheels;

(e) No part of a raised wheel housing shall extend into the emergency door opening.

(85) Wheelchair Tie Down and Occupant Restraint System (WTORS):

(a) A WTORS that meets 49 CFR 571.222 shall be provided for each fixed wheelchair location.

(b) A WTORS that meets 49 CFR 571.222 shall be provided for each flexible wheelchair location not occupied by a flexible track mounted school bus seat.

(c) The WTORS, including the anchorage track, floor plates, pockets or other anchorages, shall be provided by the same manufacturer or shall be certified to be compatible by the manufacturers of all equipment/systems used.

(d) Adjustable and accessible positive fastening devices shall be provided, attached to floor or walls or both, that will securely hold wheelchairs or other type of ambulatory mobility devices in the event the vehicle is overturned and to prevent the wheels from leaving the floor in case of a sudden movement. All floor-mounted attachment devices shall be affixed with nut and bolt fasteners, except in areas where it is not practicable.

(e) Wheelchairs or other devices designed solely for use by handicapped or convalescent passengers may be positioned in a direction other than forward-facing only at the specific direction of the student's IEP when forward-facing positions are available;

(f) No fastening device shall be attached to any door;

(g) Wheelchair securement positions shall be located such that wheelchairs and their occupants do not block access to the lift door or exits.

(h) An ANSI/RESNA WC18 Compliant WTORS may be specified when transporting a wheelchair that is fully compliant with WC19 (2012), which includes a crash tested wheelchair-anchored pelvic belt.

(86) Wind ~~deflectors~~ Deflectors may be installed according to manufacturer's standards on the rear roof to deflect snow, dust and dirt from the rear window.

(87) Windshield and Windows:

(a) All glass in windshield, windows and doors shall be of approved safety glass so mounted that its identification mark is visible and of a quality to prevent distortion in any direction. All glazing materials shall be on the approved list of the Oregon Department of Motor Vehicles;

(b) Windshield shall be of safety plate glass AS-1 grade as specified by American National Standards Institute Safety Code Z26.1;

(c) Windshield glass may be heat absorbing and may have a horizontal gradient band starting slightly above the line of the operator's vision and gradually decreasing in light transmission to 20 percent or less at the top of the windshield in compliance with Federal Motor Vehicle Safety Standard 205;

(d) Glass in all side windows, doors and rear windows shall be AS-2 or better grade, as specified in ANSI Z26.1, or AS-4 coated abrasion resistant rigid plastic meeting requirements of Federal Motor Vehicle Safety Standard 205. Rigid plastic cannot be used for windshields or windows immediately to the left or right of the driver;

(e) Side windows shall conform to the following:

(A) Buses shall provide full drop or split sash windows which provide an unobstructed opening of at least 12 inches and not more than 14 inches in height, obtained by lowering the sash, and at least 22 inches in width. Type A-1 and A-2 buses may have a full drop or split sash windows which provide an unobstructed opening of at least 9 inches and not more than 13 inches in height, obtained by lowering the sash, and at least 22 inches in width, provided the bus has 2 swing-out windows. This requirement does not apply to emergency exit windows installed in compliance with section (24) of this rule

(B) One window on each side of the bus may be less than 22 inches in width. This window need not be split sash.

(C) Windows may be tinted.

(88)(a) Windshield Washers:

(b) Bus shall be equipped with windshield washers.

Statutory/Other Authority: ORS 327.013, ORS 820.100, ORS 820.105, ORS 820.110 & ORS 820.120

Statutes/Other Implemented: ORS 327.013, ORS 820.100, ORS 820.105, ORS 820.110 & ORS 820.120

History:

[ODE 55-2024, amend filed 10/25/2024, effective 10/25/2024](#)

[ODE 19-2021, amend filed 05/27/2021, effective 05/27/2021](#)

[ODE 5-2018, amend filed 02/21/2018, effective 02/21/2018](#)

ODE 40-2014, f. & cert. ef. 9-3-14

ODE 19-2012, f. & cert. ef. 6-14-12

581-053-0615

Special Pupil Activity Bus (SPAB) Motor Carrier Requirements

(1) Providers of SPAB services to Oregon Transportation Entities must receive a Certificate of Carrier Approval from ODE.

(2) ODE shall issue a Certificate of Carrier Approval to a provider of SPAB services if the provider submits:

(a) A complete ODE Certificate of Carrier Approval application form;

(b) A copy of insurance information obtained through Federal Motor Carrier Safety Administration (FMCSA's) SAFER site for approval as an interstate carrier; or a copy of insurance status with Oregon Department of Transportation Commerce and Compliance Division for approval as an intrastate-only carrier.

(c) Documentation of a safety rating of:

(A) "Satisfactory" from the USDOT within the last 3 years; or

(B) "1, 2, or 3" from Department of Defense (DOD); or

(C) Current copies of:

(i) A level 1 or 5 safety inspection report with the number of Commercial Vehicle Safety Alliance (CVSA) decal for each SPAB; and

(ii) Documentation that the provider has implemented an alcohol and controlled substance testing program in compliance with 49 CFR parts 40 and 382; and that all drivers seeking SPAB certification are enrolled in a random testing program for alcohol and controlled substance meeting all applicable requirements; and

(iii) Driver logs as requested by ODE during the past 6 months; and

(iv) List of SPABs by license plate number that will be used for student activities.

(3) Certificate of Carrier Approval shall expire one year after date of issuance.

(4) ODE may inspect records of vehicles and drivers at the carrier's facility. Failure to allow ODE to inspect records may result in revocation of the "Certificate of Carrier Approval".

(5) SPAB Carriers may only subcontract with carriers that possess a valid Certificate of Carrier Approval to provide SPAB services.

(6) A SPAB shall not be used for home to school transportation services.

(7) ODE shall revoke a "Certificate of Carrier Approval" for failure to maintain or meet requirements of this rule.

(8) The provisions of this rule apply to SPAB carriers providing services to Oregon schools and students.

Statutory/Other Authority: ORS 327.013, ORS 820.100, ORS 820.105, ORS 820.110 & ORS 820.120

Statutes/Other Implemented: ORS 327.013, ORS 820.100, ORS 820.105, ORS 820.110 & ORS 820.120

History:

[ODE 55-2024, amend filed 10/25/2024, effective 10/25/2024](#)

ODE 19-2012, f. & cert. ef. 6-14-12

581-053-0650

Minimum Standards for All-Electric School Buses

An all-electric vehicle school bus shall meet all minimum standards for the applicable type of school bus as listed in OAR 581-053-0240 and all retrofit standards as listed in 581-053-0250 with the following modifications. All-electric vehicle school buses:

- (1) Shall meet all applicable FMVSS regulations.
- (2) Shall be exempt from the following standards:
 - (a) Air Cleaner
 - (b) Generator/alternator
 - (c) Exhaust system
 - (d) Fuel system
 - (e) Governor
 - (f) Gauges:
 - (A) Fuel gauge
 - (B) Oil pressure
 - (C) Water temperature
 - (D) Tachometer
 - (g) Oil filter
 - (h) Power & Gradeability
 - (i) Throttle
 - (j) Transmission
- (3) Electrical System shall not be required to have a cold cranking capacity, nor conform to a uniform voltage with the chassis for non-propulsive electrical components.
- (4) Buses utilizing a high voltage propulsion system (60 VDC or 30 VAC) shall comply with the following:
 - (A) The propulsion power source (batteries, fuel cells, etc.) shall be located outside the passenger compartment.
 - (B) The propulsion power source enclosure shall be constructed to conform to the power source manufacturer's requirements and recommendations.

(C) Wire, cable, and conductor insulation in the High Voltage System shall provide adequate insulation for the voltage used and for ambient temperatures ranging from- 15°F to 120°F. All high voltage wiring/cabling shall be covered with bright orange loom or otherwise labeled as HIGH VOLTAGE.

(D) All high voltage circuits shall provide adequate and automatic protection against electrical overloads caused by short circuits or other excessive current conditions through the use of fuses, circuit breakers, and ground fault interruption.

(E) Each door, cover, or other panel that affords immediate access to any high voltage area shall be plainly marked with a hazard warning label which shall read WARNING—HIGH VOLTAGE or DANGER—HIGH VOLTAGE. This label shall be located in a highly conspicuous place.

~~(F) All high voltage access areas shall be secured to prevent unauthorized access. Wiring installed as part of the electric propulsion system is not required to conform to a standard color coding system.~~

(5) Instrument Panel shall include:

(a) High Voltage battery state of charge,

(b) Motor Temperature,

(c) Battery available range in miles,

(d) Battery discharge and regeneration rate, and

(e) Battery temperature.

~~An equivalent display for electric propulsion power shall be required in place of a fuel gauge.~~

(6) Heaters need not be hot water type.

(7) Shall be equipped with an interlock device to prevent vehicle motion when connected to charging infrastructure.

(8) Identification: All paint, lettering, trim, and any other markings shall conform to existing minimum standards in place at the time of construction;

(a) Accepted colors shall be national school bus yellow or black for all markings;

(b) Lettering specifying electric drive may be used in place of fuel type decals, and shall meet the same requirements as fuel type decals;

(c) EV Identification label:

(A) Each EV school bus shall be identified with a permanent, diamond-shaped label located on the exterior vertical surface or near-vertical surface on the lower right rear of the school bus other than on the bumper of the vehicle.

(B) The label shall be a minimum of 4.7 inches long x 3.0 inches high.

(C) The marking in the label shall consist of a blue colored background, a border, and the letters "EV", 1-inch in height with the lightning bolt in the center.

(D) In addition to the location on the right rear, labels shall be affixed to each side of the school bus, rear of the entrance door and beneath the driver's window.

(ed) The graphical symbol ISO 7010 – W012 registered as IEC 60417-5036 “Dangerous voltage,” signifying a warning regarding electricity, may be applied to an all-Electric school bus;

(ed) Master cutoff location for high-voltage system shall be clearly labeled. Battery Disconnect Label:

(A) A permanent label with black 1” letters shall identify the location(s) of the battery disconnect switch or device.

(B) Any instructions may be printed adjacent to the switch or device in letters of ½ inches high

(f) The battery compartment door may be labeled with 2 inch lettering by the words “12V BATTERIES” to identify the location of the 12 volt batteries.

(g) The charging port may be identified in 1 inch lettering adjacent to the port location.

(9) Battery System:

(a) A 24-volt system may be installed, provided it can deliver 12-volt power to interior systems.

(b) Buses with high voltage battery electric powertrain shall be equipped with a low voltage battery shut-off switch. The switch is to be placed in a location not readily accessible to the driver or passengers.

(c) High voltage battery assemblies shall be protected according to federal requirements.

(d) High voltage batteries shall have a main service disconnect that isolates the batteries and does not allow high voltage outside the battery pack.

(10) Battery System Protection:

(a) As part of the Battery Management System, EVs shall be equipped with an automatic shutdown to protect system components from damage caused by malfunctions such as charging/discharging faults, battery overheating, electrical overheating, degraded battery health, etc.

(b) Prior to automatic shutdown, a warning or maintenance indicator shall be displayed in the driver console to notify the driver of impending shutdown or the need for immediate maintenance and allow enough time to safely reposition and stop the bus. Gradual derating of propulsion shall occur prior to complete automatic shutdown.

(10) Charging Port:

(a) The high voltage batteries shall be equipped with a system that allows the batteries to be charged via a connection to the local electric utility grid. This connection shall be a Combined Charging System (CCS), North American Charging Standard (NACS), or SAE J1772, compatible with the charging equipment.

(b) The charging receptacle/port shall be mounted/located in accordance with manufacturer standards. The receptacle shall accommodate the minimum requirements for Level II AC charging DC fast charging.

(11) Electric Vehicle DC-DC CONVERTER

(a) A DC-DC converter shall be provided and deliver a minimum of 200 amps at 12VDC.

(b) The converter system shall incorporate a Ground Fault Interrupt (GFI) that disconnects/isolates the high voltage batteries in the event of a shorted circuit or water intrusion.

(12) Ignition System

(a) The ignition switch circuit shall be linked to the Battery Management System and will prevent the driving of the vehicle while it is connected to an external battery charging source.

(b) The high voltage system shall be designed so that when the ignition switch is off, the high voltage is disconnected.

(13) Regenerative Brakes: In addition to service brake specifications for combustion engine buses, Electric Vehicles (EVs) will be equipped with regenerative braking that utilizes the electric drive system in concert with the service brakes to slow the vehicle and return electrical energy to the battery system.

(14) Sound Generator: Electric and Hybrid school buses shall be equipped with a sound generator to warn pedestrians of the vehicle's approach. The sound generator shall conform to any applicable national standard recommendations.

Statutory/Other Authority: ORS 327.013, ORS 327.100, ORS 820.105, ORS 820.110 & ORS 820.120

Statutes/Other Implemented: ORS 327.013, ORS 327.100, ORS 820.105, ORS 820.110 & ORS 820.120

History:

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581-053-0320

Type 10 Driver Training and Approval

Oregon Department of Education shall approve a type 10 driver who:

- (1) Is at least 18 years of age;
- (2) Possesses a valid driver license or commercial driver license;
- (3) Is not disqualified based on driving or criminal record as required in OAR 581-053-0050;
- (4) Receives emergency procedure and evacuation training, vehicle pretrip inspection training and all other training as determined necessary by the transportation entity;
- (5) Submits an application for type 10 driver approval signed by a supervisor certifying:
 - (a) The employer will immediately notify ODE if the employer learns of any changes to the applicant's driving and criminal records that could disqualify them from driving under OAR 581-053-0050 and ensure that the driver complies with all applicable OARs;
 - (b) The applicant will be trained in first aid within 120 days of ODE approval. The applicant shall remain trained in first aid to maintain approval with ODE.
- (6) A type 10 driver may use a type 10 vehicle for a regular home to school route if:
 - (a) The applicant meets all minimum requirements for a type 10 driver listed in this rule;
 - (b) The applicant demonstrates the knowledge and ability to operate a type 10 vehicle safely and to perform related duties; and
 - (c) The applicant has passed a driving skills test and written knowledge test of laws and regulations if the applicant will be transporting students from home to school.
- (7) ODE shall maintain a list of approved drivers for each school district. The approved driver list ~~will be sent to each transportation entity twice a year, and~~ shall be made available on request.
- (8) Occasional/emergency use provision - A person who does not currently meet the driver requirements for a type 10 vehicle may be used on an occasional/emergency basis if such driver:
 - (a) Is judged competent by the local supervisor;
 - (b) Possesses a valid driver license or commercial driver license;
 - (c) Does not operate vehicles under this provision more than three days in any given fiscal year (July 1 to June 30); and
 - (d) Is not transporting students to and from school on regularly scheduled routes.
- (9) ODE may issue a certificate for a Type 10 driver to provide transportation for multiple transportation entities if an application is made by a transportation entity that will serve as sponsor for the certificate and maintain records of required training and testing of such a driver. Type 10 certificates shall expire two years after the date issued by ODE.

(10) Type 10 certificates shall be immediately invalid if:

(a) The driver fails to maintain first aid certification after the initial 120 day period; or

(b) The transportation entity notifies ODE that the driver is no longer employed with the entity or is no longer performing duties related to type 10 driving, and the entity is no longer ensuring the driver's compliance with applicable OARs.

Statutory/Other Authority: ORS 327.013, ORS 820.100, ORS 820.105, ORS 820.110 & ORS 820.120

Statutes/Other Implemented: ORS 327.013, ORS 820.100, ORS 820.105, ORS 820.110 & ORS 820.120

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ODE 19-2012, f. & cert. ef. 6-14-12

581-053-0220

School Bus Driver's Permit and Certificate

(1) No person shall transport pupils in a school bus or a vehicle that has a capacity of more than 20 passengers and not subject to regulations promulgated by the Oregon Department of Transportation or U.S. Department of Transportation, unless such person has a valid School Bus Driver's Permit or Certificate or is a temporary driver, approved by ODE. No person shall transport pupils in a school bus of any size or type without first receiving documented instruction in its safe operation.

(2) ODE shall issue a School Bus Driver's Permit to an applicant who:

(a) Possess a valid CDL with proper endorsements for the vehicle being driven;

(b) Passes a physical examination as required in OAR 581-053-0040 Physical Examinations within six months prior to application;

(c) Passes a behind-the-wheel test administered by an ODE certified behind-the-wheel trainer within one year prior to application;

(d) Is not disqualified based on driving or criminal record as required in OAR 581-053-0050 Driving and Criminal Records;

(e) Submits an application for School Bus Driver's Permit or Certificate signed by the local supervisor certifying:

(A) The employer will:

(i) Immediately notify ODE if the employer learns of any changes to the applicant's driving and criminal records that could disqualify them from driving under OAR 581-053-0050 Driving and Criminal Records;

(ii) Be in compliance with 49 CFR Part 382 FMCSA Controlled Substances and Alcohol Use and Testing; and

(iii) Ensure the driver complies with all applicable OARs.

(B) The applicant demonstrates the knowledge and ability to perform the duties of a school bus driver.

(f) Completes approved behind-the-wheel training.

(A) Training shall be for a minimum of 15 hours in actual operation of the vehicle(s) that the applicant will be expected to drive, except training may be to a minimum of four hours if:

(i) The applicant has regularly driven a school bus for a period of six months within the last three years;

(ii) The school bus was of a size and type similar to that which the applicant will be expected to drive; and

(iii) The employer has documentation from the applicant's previous employer regarding previous experience.

(B) Hours counted in paragraph (A) of this subsection shall be spent with a certified Behind-the-Wheel Trainer, or a certified Assistant Trainer working under the direction of a Behind-the-Wheel Trainer, as outlined in OAR 581-053-0130 Assistant Trainer Certificate.

- (g) Reads and speak the English language sufficiently to converse with the general public, understand highway signs and traffic signals in the English language and respond to official inquires and make entries on reports and records; and
 - (h) Complies with 49 CFR Part 382, FMCSA Controlled Substances and Alcohol Use and Testing.
 - (i) Has not held a valid School Bus Driver's Permit or Certificate within the last year.
- (3) ODE shall issue an original School Bus Driver's Certificate to applicants who:
- (a) Possess a valid CDL with proper endorsements for the vehicle being driven;
 - (b) Pass a physical examination as required in OAR 581-053-0040 within six months prior to application;
 - (c) Pass a behind-the-wheel test administered by an ODE certified behind-the-wheel trainer within one year prior to application;
 - (d) Are not disqualified based on driving or criminal record as required in OAR 581-053-0050;
 - (e) Submit an application for School Bus Driver's Permit or Certificate signed by the local supervisor certifying that:
 - (A) The employer will:
 - (i) Immediately notify ODE if the employer learns of any changes to the applicant's driving and criminal records that could disqualify them from driving under OAR 581-053-0050;
 - (ii) Be in compliance with FMCSA Controlled Substances and Alcohol Use and Testing regulations at 49 CFR 382; and
 - (iii) Ensure that the driver complies with all applicable OARs.
 - (B) The applicant:
 - (i) Demonstrates the knowledge and ability to perform the duties of a school bus driver;
 - (ii) Has completed the Core Course for school bus drivers taught by a certified Core instructor within the last four years; and
 - (iii) Is trained in first aid;
 - (f) Complete approved behind-the-wheel training.
 - (A) Training shall be for a minimum of 15 hours in actual operation of the vehicle(s) that the applicant will be expected to drive, except the training shall be for a minimum of four hours if:
 - (i) The applicant has regularly driven a school bus for a period of six months within the last three years;
 - (ii) The school bus was of a size and type similar to that which the applicant will be expected to driver; and

(iii) The employer has documentation from the applicant's previous employer regarding previous experience.

(B) Hours counted in paragraph (A) of this subsection shall be spent with a certified Behind-the-Wheel Trainer, or a certified Assistant Trainer working under the direction of a Behind-the-Wheel Trainer, as outlined in OAR 581-053-0130 Assistant Trainer Certificate;

(g) Read and speak the English language sufficiently to converse with the general public, understand highway signs and traffic signals in the English language, and respond to official inquiries and make entries on reports and records; and

(h) Comply with 49 CFR Part 382 FMCSA Controlled Substances and Alcohol Use and Testing regulations.

(i) Notwithstanding any other provision of this section, ODE shall issue a School Bus Driver's Certificate to an applicant who holds a valid School Bus Driver's Permit issued under section (2) of this rule, and who submits a School Bus Driver's Permit Conversion Card signed by a local supervisor certifying that the applicant has:

(A) Completed the Core Course for school bus drivers taught by a certified Core Instructor within the last four years; and

(B) Is trained in first aid.

(4) ODE shall renew a School Bus Driver's Certificate for an applicant who:

(a) Possesses or has possessed within the last 12 month period a valid School Bus Driver's Certificate;

(b) Possesses a valid CDL with proper endorsements for the type of vehicle being driven;

(c) Passes a physical examination as required in OAR 581-053-0040 Physical Examinations within six months prior to application;

(d) Is not disqualified based on driving or criminal record as required in OAR 581-053-0050 Driving and Criminal Records;

(e) Submits an application for School Bus Driver's Permit or Certificate signed by a local supervisor certifying:

(A) The employer will:

(i) Immediately notify ODE if the employer learns of any changes to the applicant's driving and criminal records that could disqualify them from driving under OAR 581-053-0050;

(ii) Be in compliance with 49 CFR Part 382 FMCSA Controlled Substances and Alcohol Use and Testing; and

(iii) Ensure that the driver complies with all applicable OARs.

(B) The applicant:

(i) Demonstrates the knowledge and ability to perform the duties of a school bus driver;

(ii) Has completed a Core or Core Refresher Course for school bus drivers, taught by a Core or Core Refresher instructor within the last four years;

(iii) Is trained in first aid; and

(iv) Has completed training averaging at least eight hours annually, while certified as a school bus driver during the preceding four-year period. Training must meet the requirements in OAR 581-053-0225 Approved Training for School Bus Drivers and be received by ODE to qualify.

(v) Complies with 49 CFR Part 382 FMCSA Controlled Substances and Alcohol Use and Testing.

(f) Additional tests may be required by ODE if reasonable doubt of driver competency exists or as required by rule.

(5) ODE may approve a person who does not currently possess a valid School Bus Driver's Certificate or Permit as a temporary driver. If approved, a driver shall not drive more than 10 days as a temporary driver during the approval period. ODE shall only approve a temporary driver if the driver:

(a) Submits a Request for Approval of a Temporary Driver form, signed by a supervisor;

(b) Is judged competent by the local supervisor;

(c) Possesses a valid CDL with proper endorsements for the vehicle being driven;

(d) Possesses a valid medical certificate;

(e) Has passed a driving and criminal records check as required in OAR 581-053-0050 Driving and Criminal Records; and

(f) Meets all other requirements listed on the Request for Approval of a Temporary Driver form.

(6) Expiration:

(a) School Bus Driver's permits expire 120 days after issuance, or on the date of medical certificate expiration, whichever occurs first. Permits may not be renewed. The holder of a valid permit may apply for a School Bus Driver's Certificate, provided that all requirements have been met for such certificate.

(b) School Bus Drivers' Certificates shall expire two years from the date of the physical examination required in OAR 581-053-0040, except:

(A) Certificates for applicants 55 years of age and older shall expire one year from the date of physical examination required in OAR 581-053-0040; and

(B) Certificates for applicants who have had a physical examination as required in OAR 581-053-0040 and have been issued a medical certificate with an expiration date that is prior to the expiration dates outlined in this subsection shall expire on the date the medical certificate expires.

(c) An approval of a temporary driver expires on July 1, following approval.

(7) Age Restrictions: To obtain an original School Bus Driver's Certificate or Permit, or to renew a School Bus Driver's Certificate following a person's 70th birthday, an applicant must comply with all certification requirements and successfully complete an ODE behind-the-wheel test no more than 30 days before the

date of application. The test must be administered by a behind-the-wheel trainer. A copy of the test shall be attached to the application form.

(8) A driver shall notify ODE, in writing, of any change in the driver's name, address or employer within 30 days of the change. A duplicate certificate will be issued if necessary.

(9) A School Bus Driver's Permit or Certificate shall be invalid anytime that:

(a) A transportation entity or contractor notifies ODE that the driver is no longer active;

(b) The driver is no longer trained in first aid (School Bus Certificate Only);

(c) The driver no longer meets the physical requirements outlined in OAR 581-053-0040; or

(d) The driver does not maintain or falsifies records required of a diabetic driver outlined in OAR 581-053-0040.

(10) A School Bus Driver's Permit or Certificate shall be valid again if:

(a) The permit or certificate was invalid under subsection (9)(a) of this rule when a transportation entity or contractor notifies ODE that they are ensuring the driver's compliance with these OARs.

(b) The certificate was invalid under subsection (9)(b) of this rule when the driver is trained in first aid.

(c) The permit or certificate was invalid under subsection (9)(c) of this rule when the driver meets the physical requirements outlined in OAR 581-053-0040.

(d) The permit or certificate was invalid under subsection (9)(d) of this rule when the driver is able to produce two weeks of medical records demonstrating compliance with the physical requirements for diabetic drivers outlined in 581-053-0040.

(11) ODE shall maintain a list of approved drivers for each school district. The approved driver list and training history shall be made available on request.

Statutory/Other Authority: ORS 327.013, ORS 820.100, ORS 820.105, ORS 820.110 & ORS 820.120
Statutes/Other Implemented: ORS 327.013, ORS 820.100, ORS 820.105, ORS 820.110 & ORS 820.120

History:

[ODE 21-2025, amend filed 04/24/2025, effective 04/24/2025](#)

ODE 40-2014, f. & cert. ef. 9-3-14

ODE 19-2012, f. & cert. ef. 6-14-12

Summary

Meeting Date: 10/16/2025

Title: Menstrual Dignity for Students: Reimbursement Program

Status: Second Reading (no changes)

Presentation: No (Written Report Only/Consent)

Key Staff: Sasha Grenier, Vanessa Martinez

Topic Summary: ODE is proposing revising OAR 581-021-0596 to require a biennial grant and reimbursement process, rather than a yearly one.

ODE Education Equity

Stance

Education equity is the equitable implementation of policy, practices, procedures, and legislation that translates into resource allocation, education rigor, and opportunities for historically and currently marginalized youth, students, and families including civil rights protected classes. This means the restructuring and dismantling of systems and institutions that create the dichotomy of beneficiaries and the oppressed and marginalized.

BACKGROUND AND NEED

Members of the State Board of Education are volunteers, with unique professional and lived experiences. Using plain language, this section should provide context for this item, including any needed overviews of relevant programs or initiatives.

- 1. Briefly, how does this topic, program, or initiative currently operate? Where is it located within Oregon’s school systems? How does it ultimately serve students?**

The Menstrual Dignity Act requires that all school districts provide critical supplies to students to access their education. [Surveys have shown](#) that lack of free menstrual products causes students to miss school, leave class early, and experience anxiety, especially for students who experience poverty and students who are underserved in educational and public service settings. The Act requires that all school districts provide free, accessible menstrual products privately in all student bathrooms. Subsequent rules clarified key definitions, requirements related to accessibility, inclusivity, and education, and reimbursement program specifics.

The Menstrual Dignity act also provided funding to school districts, charter schools, and ESDs to provide reimbursements for the provision of menstrual products, dispensers, and installation costs, out of a carveout of the state school fund. OAR 581-021-0596 stipulates how the reimbursement program is operated, specifying that it occurs on a yearly cycle, providing school districts, charter schools, and ESDs new grants or grant amendments **every year**. This rule created a process where after ODE receives the total legislative budget for the biennium,

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ODE then determines how much funding is available **each year to eligible entities**, based on their Annual Daily Membership (ADM). The rule then specifies that this total is then distributed on a 49% / 51% yearly split between year 1 and year 2 of the biennium.

ODE is proposing revising OAR 581-021-0596 to require a biennial grant and reimbursement process, rather than a yearly one. This would mean that ODE would determine how much funding is available to eligible entities each biennium, using 100% of the legislatively approved budget, without a 49% / 51% yearly split.

- 2. Please list the specific rule(s), statute(s), or recently passed legislation that allows the Board to take action on this item. Where are they prescriptive and where do they provide the Board and Department flexibility?**

ORS 326.545 set the requirements for school districts to provide menstrual products and provides for a funding carveout in the State School Fund of up to \$5,595,000 per biennium. OAR 581-021-0596 stipulates how the reimbursement program is operated.

- 3. Has this item come before the Board before? If so, when did the Board last take action, and what was that action?**

Since the passage of the Menstrual Dignity Act in 2021, ODE staff has come before the board for temporary rules in 2021, permanent rules in 2022, and then in 2023, to adopt a rule within Division 22, linking the rules to the compliance and technical support components of Division 22.

- 4. Why is this item coming before the Board now?**

Based on external feedback and ODE streamlining initiatives aimed at reducing administrative burden, ODE is proposing revising OAR 581-021-0596 to require a biennial grant and reimbursement process, rather than a yearly one. This would mean that ODE would determine how much funding is available to eligible entities each biennium, using 100% of the legislatively approved budget, without a 49% / 51% yearly split. As a result, the spending period would be extended to two years without ODE and eligible entities having to execute new agreements.

Over the years, districts, charter schools, and ESDs have communicated that the current process puts a heavy administrative burden on district staff. The current process is also a heavy administrative burden on ODE resulting in delayed executed grant agreements and amendments. The current process requires districts, charter schools, and ESDs to sign new grant agreements or amendments every year and does not provide districts with confirmed dollar amounts in a timely way with which to budget for purchases and plan an effective program.

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The proposed change would mean that districts will know how many funds they have for two years, access to the funds for two years, and can spend the money for two years, without having to sign new agreements. Districts would still submit reimbursement forms and draw down their funds throughout the two years.

Importantly, the yearly recalculation has not been shown to significantly impact funding amounts, which was the original reason for designing the program with a yearly split. The intention was to allow for recalculation of ADM that would more accurately represent the number of students they have. However, data has shown that most districts who claim funds still do not claim all their funds, and that the recalculation wasn't benefiting districts as much as we had hoped. Instead, districts were often losing their grant money in between years because they may have missed the amended contract getting sent out due to staff turnover or other reasons.

This change is especially timely because this biennium's spending period began on July 1, 2025. The sooner that districts know their funding status for the biennium, the sooner they can begin their planning, purchasing, and implementing a strong Menstrual Dignity Program.

5. Who requested or brought about the need for this item? (Select all that apply.)

- ODE Staff
- Students
- Families
- Community-Based Organizations
- Culturally Specific Organizations
- School Districts
- Education Service Districts
- Charter Schools
- Oregon State Legislature
- Educational Associations
- Racial Justice Council
- Federal Government
- One or more of Oregon's nine federally recognized tribes: _____
- Other: _____

ENGAGEMENT STRATEGY AND LEARNINGS

The State Board of Education expects all items that come before it be reviewed and influenced, to the greatest extent possible, by a robust community engagement process. Using plain language, this section should provide an overview of the role that engagement played in this item, including with Oregon's nine federally recognized Tribes, other state agencies, and external partners.

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6. How did the [Equity Decision Tree](#) inform your office/team engagement strategy? Who is most likely to be affected and how have they been intentionally incorporated into the engagement process for this item?

ODE analyzed who would be impacted by this change and reached out to partners early in the process. An internal and external engagement plan informed outreach throughout August and September. A survey was distributed to over 5,000 people on the Menstrual Dignity listserv, which includes all partners and grantees, the sexuality education listserv, which includes education, public health, community partners, and the business administrator listserv, which includes business administrators from across the state, who are the ones who would be impacted by this rule change.

ODE staff also presented at the Oregon Association of School Business Administrators, Oregon's Rule Advisory Committee, and ODE's Sexuality Education Steering Committee, which has youth members, who all provided further supportive feedback.

7. After consulting with ODE's Rules Coordinator and the Office of Indian Education, did this item require Tribal Consultation and/or Tribal Communication with Oregon's nine federally recognized tribes? (For more information, please reference ODE's [Tribal Consultation Toolkit](#).)

- No
- Yes – Both Consultation and Communication.
- Yes – Only Communication.

8. Has your office/team considered how this item intersects with the authority of other state entities that serve the health and education needs of Oregon's students, or otherwise contribute to the climate of Oregon's school systems? If so, please select from the below list.

- N/A; this item does not intersect with other state entities.
- Oregon Health Authority (OHA)
- Department of Early Learning and Care (DELIC; formerly ELD)
- Educator Advancement Council (EAC)
- Higher Education Coordinating Commission (HECC)
- Youth Development Oregon (YDO)
- Teacher Standards and Practices Commission (TSPC)
- Oregon Housing and Community Services (OHCS)
- Other: _____

If you selected any of the above entities, please share why they were involved, how the Department partnered with them, and what feedback they provided.

Please enter your answer here

9. Which geographic perspectives are intentionally represented in your office/team engagement strategy?

- Northeast Oregon
- Central and Southeast Oregon
- Southwest Oregon
- Willamette Valley and Central Coast
- Northwest Oregon
- Tribal lands
- Other: We reached business administrators and program grantees in school districts across Oregon.

Why did your office/team focus on the above geographical perspective(s)?

Please enter your answer here

10. Please highlight some of the key pieces of feedback your office/team received during the engagement process. How did this feedback influence the development of this item? How were differences in opinion accounted for?

Out of 50 survey responses (as of October 1th), 68% strongly supported or supported the change and 20% were neutral. Thus, 88% either supported the change or were neutral. Importantly, this represented 100% of small school districts who responded to the survey.

Quotes from the survey included:

- **“It would be really great to know funding for a two-year cycle, and be able to have grant agreements and grant funds available more timely.”**
- **“I appreciate the request for information and thinking how to make it easier for all involved, especially with limited funds and, especially in small districts, limited staff. Thank you!!!”**
- **“[This change will lead to] faster access to the grant awards, and knowledge of the 2nd year award ahead of time.”**
- **“[This change will lead to] less work in tracking down the grant agreement each year.”**
- **“ [This change] will save time for everyone involved. Thank you!”**
- **“I see it being a positive change. We will not feel as "rushed" with one year's funding, but can rather pace it out over two years.”**

Other supportive comments in ORCA and OASBO included:

- COSA: “This is a valuable and needed technical fix.”
- OAESD: “This is a good rule change. Thank you.”
- OHA: “Strong support for this program and this change - thanks!”

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ODE received 5 responses who either did not support or strongly did not support. In ODE’s analysis, it was found that those responses expressed concerns that didn’t reflect what is actually changing with this proposal. Most of those responses included concerns related to the ability to purchase, invoice, or seek reimbursement more often than every two years. The proposal would not change how often they can purchase, invoice or seek reimbursement—eligible entities will still be able to do this on a rolling basis, whenever works best for their own accounting systems. ODE will work with districts, charters, and ESDs to ensure that this process is clear and smooth.

11. Please describe any additional engagement opportunities your office/team will be pursuing prior to asking the Board to take action on this item.

ODE staff will incorporate feedback from the ORCA and continue sharing the engagement survey. ODE staff will also solicit feedback from ODE’s Sex Ed Steering Committee, who is meeting on September 11th. These actions were complete.

FISCAL AND ADMINISTRATIVE IMPACT ANALYSIS

Equitable resource allocation is a critical component of education equity. Using plain language, this section should describe the fiscal, administrative, and small business impacts of this item, and how it affects the larger social system that serves Oregon’s students.

12. After consulting with ODE’s Rules Coordinator and Grant Consolidation Team, was this item identified as a grant-related item?

- No
- Yes; please review Appendix B: Grant Consolidation below.

13. Will Board action create fiscal or administrative impacts on districts, ESDs, community-based organizations, and/or the nine federally recognized tribes? If so, please describe the anticipated short- and long-term effects and how they may be felt differently in small, rural, or remote communities.

The fiscal impact will also be positive for schools, charter schools, and ESADs. By freeing up local staff time and enabling better planning, schools can use these administrative resources more effectively. This will especially serve small school districts and other districts who face resource and staffing limitations.

14. Will Board action create a fiscal or administrative impact on state agencies, units of local government, and/or the public? Will it increase costs associated with compliance for small businesses?

This rule change will ease the administrative burden on ODE staff, who have been overstretched by the annual creation and coordination of approximately 325 contracts, which results in delayed executed grant agreements. ODE staff time can better serve districts by

providing technical support, creating tools and resources, and engaging education programs to continue improving the services it provides.

EQUITY IMPACT ANALYSIS

The State Board of Education envisions an aspirational education system that honors its increasingly diverse student body and affirms every student to reach their full potential in a rapidly shifting global environment. Using plain language, this section should describe the impact of this item on students and the larger social system that serves their health and education needs.

15. How will Board action on this item ultimately impact students and their families, particularly those who have been and continue to be systemically marginalized?

This rule change will benefit students who are underserved and underrepresented by both freeing up school staff time to focus on equitable educational activities and allowing school districts more time to plan a robust menstrual dignity program that provides students with menstrual products in an inclusive, culturally responsive, and dignified way, in alignment with [ODE's Menstrual Dignity Toolkit](#). This program will help small schools with limited staff and serve students who need it the most. This point was highlighted by school partner: "This program allows us to have free menstrual products available to all of our students at all times. It is especially valuable since we have **high poverty rates in our school district.**"

16. How will Board action on this item ultimately impact school district employees and volunteers, particularly those who have been and continue to be systemically marginalized?

We do not anticipate any impacts on school district employees and volunteers, besides easing of workload.

17. What are the anticipated short- and long-term consequences of Board action on this item? Will Board action have a cumulative effect on students, families, educators, districts, or Oregon's school systems?

This rule change will allow districts to strengthen their menstrual dignity programming, which will benefit students academically and socially. It will help to destigmatize menstrual health and puberty, which negatively impacts students and people of all ages.

18. What are the anticipated short- and long-term consequences of inaction on this item and who would experience those consequences?

Without this change, districts and ODE will continue to coordinate annual funding distributions and executing agreements. This will continue to create inefficiencies in the system and overburden small districts and others with limited resources.

RECOMMENDED ACTION

The State Board of Education has dedicated itself to challenging the status quo and sharing responsibility for every student's academic and lifelong success. Using plain language, this section should describe the choice before the Board, the Department's recommendation, and any other relevant information.

- 19. Please provide a brief summary of the specific language your office/team is bringing to the Board. Are there any key decisions within this language that your office/team would like the Board to make?**

[OAR 581-021-0596](#) would be updated to read:

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

and

(5) [Any unspent funds for the first year of the biennium shall be rolled into 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.

- 20. How is this language responsive to identified needs and/or feedback received through the engagement process? How is it in alignment with [the Board's Mission, Vision, and Values](#)?**

This change aligns with ODE and the Board's vision for equity, transparency, and financial stewardship.

- 21. Please describe the action your office/team is recommending to the Board (for example, the adoption of rules or the approval of a waiver) and how it reflects the Department's commitment to academic excellence, belonging and wellness, and reimagining accountability.**

This change aligns with ODE's commitment to streamlining grants and school accountability efforts and to improving belonging and wellness among students in Oregon.

- 22. Please note any additional support the Department is (or will be) providing to ensure successful implementation of this item.**

- N/A; this item does not require any additional support.
- Communications plan
- Technical assistance, professional development, and/or coaching
- Direct or differentiated support for small, rural, or remote school districts
- Corrective Action Processes
- Safety measures
- Organizational culture or practice changes (change management)

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- Materials and/or supplies
- Guidance and/or supplemental resources
- Other: _____

23. Has this item changed since the last Board meeting?

- N/A; this item has not previously been before the Board
- No; same as last month
- Yes; please review Appendix A: Second Reading below.

APPENDIX A: SECOND READING

Appendix A should only be completed if "yes" is selected for question 23. Using plain language, this section should provide a summary of any additional engagements, learnings, or changes that have occurred since the First Reading of this item.

1. Please describe any additional engagement opportunities your office/team has pursued since the First Reading of this item. Which perspectives were intentionally included?

The outreach survey has continued receiving responses in strong support of the change. It has gone out on additional newsletters to over 2,000 people. We have also hosted two additional engagement sessions, one with ODE's Sex Ed Steering Committee, which includes youth members. The engagement sessions continued to find strong support for the change. In the process, we received responses from 41 unique school districts and ESDs

2. Has your office/team received any additional public comment on this item? If so, who provided that comment and what feedback did they provide?

We have heard from two additional respondents who were in strong support of the change.

3. Please describe any overall learnings that have occurred since the First Reading of this item. How were differences in opinion accounted for?

We have learned that this change is widely supported.

4. Please provide a brief summary of the changes your office/team have made to this item since the First Reading. How are these changes responsive to identified needs and/or feedback received through the engagement process?

There have been no changes to the rule.

APPENDIX B: GRANT CONSOLIDATION

Appendix B should only be completed if "yes" is selected for question 12. Using plain language, this section should provide additional detail on how grant rules have been aligned and designed to support districts and meet administrative needs.

1. Please indicate which of the following underlying processes are required for this grant program.

- Conduct a needs assessment
- Gather and provide additional data
- Submit an application to ODE
- Submit a report to ODE
- Submit a plan to ODE
- Submit a budget to ODE
- Conduct community engagement
- Other: Submit a signed agreement and a reimbursement form.

2. How has your team/office worked to encourage more equitable resource allocation and address administrative impacts, particularly for small or rural school districts? How has this grant been aligned with existing grant programs?

This rule aims to reduce the administrative burden for all districts, but it will be most beneficial for small districts and those with limited staff and resources.

3. How are the grant requirements differentiated for small and rural school districts?

Grant requirements are the same for all districts.

581-021-0596

Menstrual Dignity for Students: Reimbursement Program

(1) The Department shall determine how much funding is available each **biennium** [year] for eligible entities based on [annual ADM and a 49/51 split of available funding] **ADM**. 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.

(5) *[Any unspent funds for the first year of the biennium shall be rolled into 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: ORS 326.545

Statutes/Other Implemented: ORS 326.545

History:

OAR 581-021-0590

Menstrual Dignity for Students: Requirements

[[1]] All education providers shall install in every student bathroom at least one dispenser that:

[[a]] **(1)** Does not require inserting coins or money;

[[b]] **(2)** Is clearly marked as free in at least two languages;

[[c]] **(3)** Is ADA compliant;

[[d]] **(4)** Is located in a place where all students can access products; and

[(e)] **(5)** 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: ORS 326.545

Summary

Meeting Date: 10/16/2025

Title: Social Science Instructional Materials

Status: Second Reading (no changes)

Presentation: Yes

Key Staff: Deirdre Banning-Shaughnessy, Amit Kobrowski, Vanessa Martinez; Standards and Instructional Supports Office of Teaching, Learning, and Assessment

Topic Summary: Rules 581-011-0070 and 581-011-0071 instruct the State Board of Education to adopt a list of basal instructional materials annually in the subject matter cycle adopted by the Board according to the criteria adopted by the Board under OAR 581-011-0117. The social science basal instructional materials list is ready for the Oregon State Board of Education to review and adopt.

ODE Education Equity

Stance

Education equity is the equitable implementation of policy, practices, procedures, and legislation that translates into resource allocation, education rigor, and opportunities for historically and currently marginalized youth, students, and families including civil rights protected classes. This means the restructuring and dismantling of systems and institutions that create the dichotomy of beneficiaries and the oppressed and marginalized.

BACKGROUND AND NEED

Members of the State Board of Education are volunteers, with unique professional and lived experiences. Using plain language, this section should provide context for this item, including any needed overviews of relevant programs or initiatives.

- 1. Briefly, how does this topic, program, or initiative currently operate? Where is it located within Oregon’s school systems? How does it ultimately serve students?**

The State Board of Education adopts instructional materials on a seven-year subject matter cycle prior to October 31 each year. School Districts use the adopted instructional materials list to guide purchasing decisions for K-12 instructional resources. This state-level adoption process provides significant cost savings and quality assurance for all Oregon districts. Traditionally, the adoption results in a seven-year contract with publishers for the content area proposed for adoption. School districts may choose instructional materials from the adopted state list or complete an independent adoption.

- 2. Please list the specific rule(s), statute(s), or recently passed legislation that allows the Board to take action on this item. Where are they prescriptive and where do they provide the Board and Department flexibility?**

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- ORS 337.050, OAR 581-011-0070 and OAR 581-011-0071: Instruct the State Board of Education to adopt a list of basal instructional materials annually in the subject matter cycle adopted by the Board.

The statute and rules are prescriptive in requiring adoption but provide flexibility in evaluation criteria and local district implementation.

3. Has this item come before the Board before? If so, when did the Board last take action, and what was that action?

This item was presented in a first reading to the state board on September 18th, 2025.

The Board last adopted instructional materials for Social Science in 2019. The updated Instructional Materials Evaluation criteria were presented to the State Board in December 2024 and adopted in January 2025.

4. Why is this item coming before the Board now?

The timing for a Board review and adoption in September and October is aligned to the relevant ORS and OARs.

5. Who requested or brought about the need for this item? (Select all that apply.)

- ODE Staff
- Students
- Families
- Community-Based Organizations
- Culturally Specific Organizations
- School Districts
- Education Service Districts
- Charter Schools
- Oregon State Legislature
- Educational Associations
- Racial Justice Council
- Federal Government
- One or more of Oregon's nine federally recognized tribes: _____
- Other: _____

ENGAGEMENT STRATEGY AND LEARNINGS

The State Board of Education expects all items that come before it be reviewed and influenced, to the greatest extent possible, by a robust community engagement process. Using plain language, this section should provide an overview of the role that engagement played in this item, including with Oregon's nine federally recognized Tribes, other state agencies, and external partners.

6. How did the [Equity Decision Tree](#) inform your office/team engagement strategy? Who is most likely to be affected and how have they been intentionally incorporated into the engagement process for this item?

The committee was selected based on regional and school district settings to balance urban, suburban, and rural representation. During the summer of 2025, the Social Science Instructional Materials Evaluation Committee, composed of K-12 social science educators, received a combination of synchronous and self-paced training. The training included an equity grounding, information about the academic content standards and adoption criteria, and a section on Ratings, Consensus, & Feedback, which provided clarity on how to determine group scores and provide high-quality feedback. Additionally, the committee received technical training about scoring and writing high-quality feedback statements.

7. After consulting with ODE’s Rules Coordinator and the Office of Indian Education, did this item require Tribal Consultation and/or Tribal Communication with Oregon’s nine federally recognized tribes? (For more information, please reference ODE’s [Tribal Consultation Toolkit](#).)

- No
- Yes – Both Consultation and Communication.
- Yes – Only Communication.

8. Has your office/team considered how this item intersects with the authority of other state entities that serve the health and education needs of Oregon’s students, or otherwise contribute to the climate of Oregon’s school systems? If so, please select from the below list.

- N/A; this item does not intersect with other state entities.
- Oregon Health Authority (OHA)
- Department of Early Learning and Care (DELIC; formerly ELD)
- Educator Advancement Council (EAC)
- Higher Education Coordinating Commission (HECC)
- Youth Development Oregon (YDO)
- Teacher Standards and Practices Commission (TSPC)
- Oregon Housing and Community Services (OHCS)
- Other: _____

If you selected any of the above entities, please share why they were involved, how the Department partnered with them, and what feedback they provided.

Please enter your answer here

9. Which geographic perspectives are intentionally represented in your office/team engagement strategy?

- Northeast Oregon

Oregon State Board of Education Docket

- Central and Southeast Oregon
- Southwest Oregon
- Willamette Valley and Central Coast
- Northwest Oregon
- Tribal lands
- Other: State-wide

Why did your office/team focus on the above geographical perspective(s)?

The list of social science materials is intended for use by school districts across the state. It is important that the perspectives of teachers from each region are part of the evaluation committee. In total, educators from 15 of the 19 ESDs in Oregon were represented in the committees.

10. Please highlight some of the key pieces of feedback your office/team received during the engagement process. How did this feedback influence the development of this item? How were differences in opinion accounted for?

During the revision and roll-out of the 2024 Social Science Standards, educators consistently emphasized the need for instructional materials that authentically integrate Ethnic Studies, Holocaust and Genocide Studies, Tribal History/Shared History, and Civics education rather than treating them as add-on components. Committee members noted that existing materials lacked sufficient depth in these areas and often presented superficial or tokenistic coverage of diverse perspectives.

Key feedback from the evaluation committee included:

- The importance of materials that present multiple perspectives on historical events and contemporary issues
- The need for age-appropriate resources that help students develop critical thinking skills about civic engagement
- Emphasis on materials that authentically represent the contributions and experiences of historically marginalized communities
- The value of having teacher support materials that help educators confidently implement the new integrated standards

This feedback directly influenced the evaluation criteria, with committee members prioritizing materials that demonstrated strong alignment with equitable student engagement standards. When disagreements arose during scoring, committee members used the established rubric and engaged in structured discussions facilitated by ODE staff. The consensus-building process required evaluators to provide specific evidence from the materials to support their ratings, which helped resolve differences through objective analysis rather than subjective preferences.

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- 11. Please describe any additional engagement opportunities your office/team will be pursuing prior to asking the Board to take action on this item.**

No additional engagement is typically held after the work of the evaluation committee is completed. After approval by the board, the list of adopted instructional materials will be shared on ODE’s webpage, with ESDs, and school districts.

FISCAL AND ADMINISTRATIVE IMPACT ANALYSIS

Equitable resource allocation is a critical component of education equity. Using plain language, this section should describe the fiscal, administrative, and small business impacts of this item, and how it affects the larger social system that serves Oregon’s students.

- 12. After consulting with ODE’s Rules Coordinator and Grant Consolidation Team, was this item identified as a grant-related item?**

- No
 Yes; please review Appendix B: Grant Consolidation below.

- 13. Will Board action create fiscal or administrative impacts on districts, ESDs, community-based organizations, and/or the nine federally recognized tribes? If so, please describe the anticipated short- and long-term effects and how they may be felt differently in small, rural, or remote communities.**

School districts are required to provide basal instructional materials for student use. School districts may decide to purchase new materials or reevaluate current materials for alignment to state standards and the criteria adopted by the board. Local school district funding is used to purchase materials. The seven-year cycle allows districts to plan spending on materials.

- 14. Will Board action create a fiscal or administrative impact on state agencies, units of local government, and/or the public? Will it increase costs associated with compliance for small businesses?**

ODE incurs administrative costs for facilitating the evaluation process, maintaining the adopted materials list, and providing technical assistance to districts.

EQUITY IMPACT ANALYSIS

The State Board of Education envisions an aspirational education system that honors its increasingly diverse student body and affirms every student to reach their full potential in a rapidly shifting global environment. Using plain language, this section should describe the impact of this item on students and the larger social system that serves their health and education needs.

- 15. How will Board action on this item ultimately impact students and their families, particularly those who have been and continue to be systemically marginalized?**

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Student civic action directly precipitated the legislation calling for the inclusion of underrepresented histories, contributions, and perspectives. The 2024 Social Science Standards and the identified instructional materials support the required revisions of our state standards adopted by the State Board of Education in June 2024.

The 2024 Social Science Standards integrated multiple legislative requirements, creating a more complete understanding of our shared past and collective future. This adoption is critical because the 2024 Social Science Standards introduced new integrated requirements for Ethnic Studies, Holocaust and Genocide Studies, and Civics education that existing materials do not adequately support.

The identification and adoption of instructional materials aligned to the new social science standards provides districts with the opportunity to fully address the standards now including a more complete understanding of our shared past and collective future.

The review of instructional materials is an opportunity to set a vision of what equitable teaching and learning looks like within adopted materials in K-12 social science. Equitable access to high-quality materials, teaching practices, and expectations are the foundation to the vision of K-12 social science education. ODE shares the vision of access, equity, and effective education for social science, as described by the National Council for Social Studies:

Powerful and rigorous social studies teaching that is rooted in standards, supported by professional development that reflects best practices, and utilizes high-quality educational materials is crucial to realizing the NCSS vision: A world in which all students are educated and inspired for lifelong inquiry and informed civic action. [A Position Statement of National Council for the Social Studies, Approved April 2023](#)

By conducting a state-level instructional materials adoption process, all school districts have access to a list of vetted high-quality instructional materials. "High-quality curriculum allows students to build knowledge and skills that will prepare and provide opportunities for critical thinking and discourse to engage with the world successfully. Thus we get to the heart of equity and empowerment." (*Nychelle Toussaint, CA EdReports evaluator*). The State Board's adoption of the approved list for social science supports districts in selecting instructional materials aligned to the 2024 Social Science Standards.

16. How will Board action on this item ultimately impact school district employees and volunteers, particularly those who have been and continue to be systemically marginalized?

The adoption of high-quality instructional materials aligned to the 2024 Social Science Standards will significantly benefit school district employees. These materials intentionally center the contributions, perspectives, and histories of traditionally marginalized individuals and groups, providing educators with authentic resources that reflect diverse experiences.

For teachers, having materials that accurately represent their histories and contributions reduces the emotional and intellectual labor of constantly supplementing inadequate resources or correcting problematic content. The adopted materials will also reduce the administrative

burden on all teachers who would otherwise need to spend significant time researching, creating, or locating supplemental materials to address gaps in existing curricula.

17. What are the anticipated short- and long-term consequences of Board action on this item? Will Board action have a cumulative effect on students, families, educators, districts, or Oregon’s school systems?

School districts will save significant time and money by selecting from a pre-vetted list rather than conducting independent evaluations, while receiving guaranteed contract pricing for seven years that enables better budget planning. Teachers will gain immediate access to materials specifically designed to support the 2024 Social Science Standards, reducing preparation time for new integrated content, and students will begin receiving more consistent, standards-aligned instruction across districts statewide. This will have the most significant positive impact on historically marginalized students who will see their experiences and contributions authentically represented in their education for the first time at scale across Oregon.

Over the long term, students will develop deeper, more nuanced understanding of civic engagement, historical analysis, and diverse perspectives as they progress through a coherent K-12 social science curriculum that builds knowledge systematically across grade levels. Teachers will gain increased expertise and confidence in facilitating discussions about complex historical events, contemporary social issues, and multicultural perspectives through sustained use of high-quality instructional materials that provide comprehensive pedagogical support. The cumulative effect will be Oregon students who graduate with stronger critical thinking skills, greater civic knowledge, and enhanced ability to engage thoughtfully with diverse viewpoints, preparing them to be informed participants in a democratic society. Additionally, the statewide implementation will create a generation of educators with enhanced capacity to teach integrated social science content, establishing a foundation for continued excellence in civic education across Oregon's schools. This allows for deeper collaboration and professional learning across schools, districts, and regions in Oregon.

18. What are the anticipated short- and long-term consequences of inaction on this item and who would experience those consequences?

Without an adopted list, school districts will need to complete their own identification, review, and evaluation of K-12 instructional materials. This requires additional staffing, time, and financial requirements that few districts include in their budget.

RECOMMENDED ACTION

The State Board of Education has dedicated itself to challenging the status quo and sharing responsibility for every student’s academic and lifelong success. Using plain language, this section should describe the choice before the Board, the Department’s recommendation, and any other relevant information.

19. Please provide a brief summary of the specific language your office/team is bringing to the Board. Are there any key decisions within this language that your office/team would like the Board to make?

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The Oregon Department of Education hereby requests that the State Board of Education adopt basal instructional materials for social science with a contract period beginning February 1, 2026, and ending June 30, 2033.

20. How is this language responsive to identified needs and/or feedback received through the engagement process? How is it in alignment with [the Board's Mission, Vision, and Values](#)?

The [proposed list of instructional materials](#) directly responds to educator feedback emphasizing the need for comprehensive, integrated materials that authentically represent diverse perspectives rather than superficial add-ons. By establishing rigorous non-negotiable criteria for content alignment and equitable student engagement, this approach ensures adopted materials meet the quality standards educators identified as essential.

This action aligns with the Board's Mission by supporting equitable policies that lead to educational success for every Oregon student through vetted, high-quality materials that remove barriers districts face in independent resource identification. It advances the Board's Vision by honoring Oregon's increasingly diverse student body through integrated Ethnic Studies content and affirming every student's potential with culturally responsive resources.

The adoption demonstrates the Board's Values by centering diversity, equity, and inclusion through materials that prioritize marginalized voices, challenging the status quo with innovative and culturally responsive curriculum that reflects Oregon's evolving demographics. The transparent evaluation process and local district autonomy in selection exemplify the Board's commitment to integrity and transparency while engaging community voice through educator participation in the evaluation process.

The acknowledgment that basal materials require supplementation respects district autonomy and recognizes that comprehensive curriculum must be locally adapted, reflecting the Board's commitment to shared responsibility for student success.

21. Please describe the action your office/team is recommending to the Board (for example, the adoption of rules or the approval of a waiver) and how it reflects the Department's commitment to academic excellence, belonging and wellness, and reimagining accountability.

The Department recommends that the State Board of Education adopt the following list of basal instructional materials for social science: [2025 Social Science Adoption List](#).

The rigorous evaluation process ensures that only materials meeting high standards for content alignment, pedagogical quality, and technical usability are recommended. The adoption prioritizes materials that authentically integrate diverse perspectives and historically marginalized voices, creating learning environments where all students see themselves

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reflected and valued. By requiring materials that address Ethnic Studies, Holocaust and Genocide Studies, Tribal History/Shared History, and Civics education in meaningful ways, this action supports student identity development and cultural affirmation, contributing to overall student wellness and engagement.

The proposed instructional materials list and supports provide districts with curated materials and transparent evaluation criteria, empowering local decision-making while ensuring quality standards. Districts retain autonomy to select materials that best serve their communities or pursue independent adoptions, creating a distributed accountability model that respects local context while maintaining statewide quality assurance. The seven-year contract cycle also provides predictable planning opportunities that support sustainable resource allocation.

22. Please note any additional support the Department is (or will be) providing to ensure successful implementation of this item.

- N/A; this item does not require any additional support.
- Communications plan
- Technical assistance, professional development, and/or coaching
- Direct or differentiated support for small, rural, or remote school districts
- Corrective Action Processes
- Safety measures
- Organizational culture or practice changes (change management)
- Materials and/or supplies
- Guidance and/or supplemental resources
- Other: _____

23. Has this item changed since the last Board meeting?

- N/A; this item has not previously been before the Board
- No; same as last month
- Yes; please review Appendix A: Second Reading below.

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* indicates "exemplary" program scoring of 80% or higher with no criterion score of zero.

**Instructional materials designated as "does not meet Oregon adoption criteria" may still be adopted as (3) School districts must complete an independent evaluation to independently adopt materials designated as

Category	Oregon Adoption Criteria	Publisher
Category 1: Grades K-2	MEETS*	InquirED
Category 1: Grades K-2	MEETS*	Gibbs Smith Education
Category 1: Grades K-2	MEETS	McGraw Hill LLC
Category 1: Grades K-2	MEETS	Savvas Learning Company LLC
Category 1: Grades K-2	MEETS*	Teachers' Curriculum Institute (TCI)
Category 2: Grades 6-8	MEETS	Cengage Learning, inc
Category 2: Grades 6-8	DOES NOT MEET	Educurious (by NCEE)
Category 2: Grades 6-8	MEETS*	Gibbs Smith Education
Category 2: Grades 6-8	MEETS*	Imagine Learning LLC
Category 2: Grades 6-8	MEETS*	McGraw Hill LLC
Category 2: Grades 6-8	MEETS	Savvas Learning Company LLC
Category 2: Grades 6-8	MEETS	Social Studies School Service
Category 2: Grades 6-8	MEETS*	Teachers' Curriculum Institute (TCI)
Category 3: Grades 9-12 History	MEETS*	Cengage Learning, inc

Category 3: Grades 9-12 History	MEETS*	Cengage Learning, inc
Category 3: Grades 9-12 History	DOES NOT MEET	Pearson Education, inc
Category 3: Grades 9-12 History	MEETS*	Educurious (by NCEE)
Category 3: Grades 9-12 History	MEETS*	Imagine Learning LLC
Category 3: Grades 9-12 History	DOES NOT MEET	Imagine Learning LLC
Category 3: Grades 9-12 History	MEETS*	McGraw Hill LLC
Category 3: Grades 9-12 History	MEETS*	McGraw Hill LLC
Category 3: Grades 9-12 History	MEETS*	Savvas Learning Company LLC
Category 3: Grades 9-12 History	DOES NOT MEET	Savvas Learning Company LLC
Category 3: Grades 9-12 History	MEETS*	Teachers' Curriculum Institute (TCI)
Category 3: Grades 9-12 History	MEETS*	Teachers' Curriculum Institute (TCI)
Category 4: Grades 9-12 Civics and Government	MEETS*	Cengage Learning, inc
Category 4: Grades 9-12 Civics and Government	MEETS*	Cengage Learning, inc
Category 4: Grades 9-12 Civics and Government	MEETS*	Educurious (by NCEE)
Category 4: Grades 9-12 Civics and Government	MEETS*	Imagine Learning LLC
Category 4: Grades 9-12 Civics and Government	MEETS*	McGraw Hill LLC
Category 4: Grades 9-12 Civics and Government	DOES NOT MEET	Portland Urban Debate League
Category 4: Grades 9-12 Civics and Government	DOES NOT MEET	Savvas Learning Company LLC
Category 4: Grades 9-12 Civics and Government	MEETS*	Teachers' Curriculum Institute (TCI)
Category 5: Grades 9-12 Geography	MEETS*	Cengage Learning, inc
Category 5: Grades 9-12 Geography	DOES NOT MEET	Pearson Education, inc
Category 5: Grades 9-12 Geography	MEETS*	Imagine Learning LLC
Category 5: Grades 9-12 Geography	MEETS*	McGraw Hill LLC

Category 5: Grades 9-12 Geography	MEETS*	Teachers' Curriculum Institute (TCI)
Category 6: Grades 9-12 Economics	MEETS*	Cengage Learning, inc
Category 6: Grades 9-12 Economics	MEETS*	Cengage Learning, inc
Category 6: Grades 9-12 Economics	DOES NOT MEET	Pearson Education, inc
Category 6: Grades 9-12 Economics	MEETS	Imagine Learning LLC
Category 6: Grades 9-12 Economics	MEETS*	McGraw Hill LLC
Category 6: Grades 9-12 Economics	MEETS*	Nucleus Courses
Category 6: Grades 9-12 Economics	MEETS*	Savvas Learning Company LLC
Category 6: Grades 9-12 Economics	MEETS*	Teachers' Curriculum Institute (TCI)
Category 7: Grades 3-5	MEETS*	InquirED, inc
Category 7: Grades 3-6	MEETS	Gibbs Smith Education
Category 7: Grades 3-7	MEETS*	McGraw Hill LLC
Category 7: Grades 3-8	MEETS*	Savvas Learning Company LLC
Category 7: Grades 3-9	MEETS*	Teachers' Curriculum Institute (TCI)

Instructional Materials in Social Science- Contract Years 2026-2033

1) supplemental materials or (2) in other course categories, at the discretion of local school boards.
s “does not meet Oregon adoption criteria” in the category of Social Science Education.

Program Title

Category 1: Grades K-2

[Inquiry Journeys, Grades K, 1, 2](#)

[K-2: Exploring my place in the World, Exploring my Communities, Exploring Near and Far](#)

[Impact Social Studies: Grades K, 1, 2](#)

[myWorld Interactive Social Studies Grades K, 1, 2](#)

[Social Studies Alive! Me and My World \(K\), My School and Family \(1\), My Community \(2\)](#)

Category 2: Grades 6-8

[National Geographic Grades 6, 7, 8 - World History Great Civilizations: Ancient Through Early Modern Times, 'U.S. History American Stories Beginnings to 1877](#)

[Educurious Middle School Ancient World History, Middle School World History, Middle School US History](#)

[6-8 Bundle: 6-8: Beyond Borders to 1500 CE, Eras World History to 500 CE, Bridges and Boundaries, Beyond Borders 1500 CE to Present, Eras World History 300 CE to 1770 CE, An American Odyssey](#)

[6-8: Traverse World Regions and Cultures: The Western Hemisphere, Traverse World Regions and Cultures: The Eastern Hemisphere, Traverse U.S. History: Beginnings to the Civil War](#)

[World History 1, World History 2, US History: Voices and Perspectives Early Years, Oregon](#)

[myWorld Interactive American History Survey, World Geography Survey, World Geography Eastern Hemisphere, Western Hemisphere](#)

[Grades 6-8: Active Classroom](#)

[History Alive! The Ancient World, The Western World, The Medieval World, The World Through 1750, The United States through Industrialism](#)

Category 3: Grades 9-12 History

[US History America Through the Lens 1877-Present](#)

[World History Voyages of Exploration](#)

[Racial & Ethnic Groups](#)

[History of Power, Conflict, and Healing](#)

[Traverse U.S. History: Reconstruction to the Present](#)

[Traverse: World History: Emergence of the Modern World to the Present](#)

[US History, OR ed.](#)

[World History, OR ed.](#)

[US History Interactive Survey, US History Reconstruction to the Present](#)

[World History Interactive Survey, Modern World](#)

[History Alive! Pursuing American Ideals](#)

[History Alive! World Connections](#)

Category 4: Grades 9-12 Civics and Government

[American Government](#)

[Gateways to Democracy](#)

[Educurious High School Civics Course](#)

[Traverse US Government](#)

[Civics, Oregon Edition](#)

[Our Civic Debate](#)

[Magruder's American Government Interactive](#)

[Government Alive! Power, Politics, and You](#)

Category 5: Grades 9-12 Geography

[National Geographic World Cultures and Geography, Survey](#)

[Contemporary Human Geography](#)

[Traverse World Geography](#)

[Geography, Oregon Ed.](#)

[Geography Alive! Regions and People](#)

Category 6: Grades 9-12 Economics

[Contemporary Economics](#)

[Managing your Personal Finances](#)

[Personal Finance Literacy](#)

[Traverse Economics](#)

[Economics, Oregon ed.](#)

[Financial Literacy: Personal Finance, Intro to Economics, Investing & Wealth Management](#)

[Economics: Principles in Action](#)

[EconAlive! The Power to Choose](#)

Category 7: Grades 3-5

[Inquiry Journeys, Grades 3, 4, 5](#)

[3-5 Bundle: Exploring Time and Place, PNW Ed., Oregon, Our Home, Shaping a Nation: A history of the United States from 1450-1865, Who We Are: A History of the US](#)

[Impact Social Studies Grades 3, 4, 5](#)

[Gr 3-5: myWorld Interactive Social Studies](#)

[Social Studies Alive! Our Community and Beyond \(3\), Regions of Our Country \(4\), America's Past \(5\)](#)



Copyright Date	Available in Spanish and/or other languages	Price List	Legal Requirements	Publisher Response
2025		Price List	Yes	InquirED
2026		Price List	Yes	N/A
2020	Yes	Price List	Yes	N/A
2019		Price List	Yes	N/A
2022	Yes	Price List	Yes	N/A
<hr/>				
2025		Price List	Yes	N/A
2024			Yes	NCEE
2027		Price List	Yes	N/A
2025		Price List	Yes	Imagine Learning
2025/2027		Price List	Yes	N/A
2019		Price List	Yes	N/A
2025		Price List	Yes	N/A
2019-2026		Price List	Yes	N/A
<hr/>				
2025		Price List	Yes	N/A

2021	Price List	Yes	N/A
2023		Yes	N/A
2024	Price List	Yes	N/A
2025	Price List	Yes	N/A
2024		Yes	N/A
2027	Price List	Yes	N/A
2027	Price List	Yes	N/A
2025	Price List	Yes	N/A
2025		Yes	N/A
2025	Price List	Yes	N/A
2023	Price List	Yes	N/A
2022	Price List	Yes	N/A
2026	Price List	Yes	N/A
2024	Price List	Yes	N/A
2025	Price List	Yes	N/A
2027	Price List	Yes	N/A
2025		Yes	PUDL
2023		Yes	N/A
2020	Price List	Yes	N/A
2026	Price List	Yes	N/A
2023		Yes	Pearson
2025	Price List	Yes	N/A
2027	Price List	Yes	N/A

2025		Price List	Yes	N/A
2018		Price List	Yes	N/A
2026		Price List	Yes	N/A
2024			Yes	Pearson
2024		Price List	Yes	N/A
2027		Price List	Yes	N/A
2025		Price List	Yes	N/A
2022		Price List	Yes	N/A
2020		Price List	Yes	N/A
2025		Price List	Yes	N/A
2023-2026		Price List	Yes	N/A
2020	Yes	Price List	Yes	N/A
2019		Price List	Yes	Savvas
2022		Price List	Yes	N/A

Summary

Meeting Date: 10/16/2025

Title: State Summer Learning Grant - New Rules

Status: Second Reading/Adoption (no changes)

Presentation: Yes

Key Staff:

Raquel Gwynn, Director of Expanded Learning

Savanah Solario, Program Improvement Analyst

Topic Summary: Establish permanent rules for the State Summer Learning Grant established by HB 2007 (2025) that define key terms, outline prioritization criteria and the application and funding process, and set the term length of grant awards.

ODE Education

Equity Stance

Education equity is the equitable implementation of policy, practices, procedures, and legislation that translates into resource allocation, education rigor, and opportunities for historically and currently marginalized youth, students, and families including civil rights protected classes. This means the restructuring and dismantling of systems and institutions that create the dichotomy of beneficiaries and the oppressed and marginalized.

BACKGROUND AND NEED

Members of the State Board of Education are volunteers, with unique professional and lived experiences. Using plain language, this section should provide context for this item, including any needed overviews of relevant programs or initiatives.

- 1. Briefly, how does this topic, program, or initiative currently operate? Where is it located within Oregon's school systems? How does it ultimately serve students?**

In 2021, 2022, and 2024, the legislature funded State Summer Learning Grants as separate single-year grant programs. In April of this year, the legislature passed HB 2007 (2025) which established the State Summer Learning Grant as a permanent, ongoing program and appropriated funding for summer 2025, 2026, and the beginning of 2027. The goal of the State Summer Learning Grant is for grantees to provide summer learning programs that accelerate learning and increase academic growth with a focus on literacy, support youth development, and ensure equitable access and family partnership.

- 2. Please list the specific rule(s), statute(s), or recently passed legislation that allows the Board to take action on this item. Where are they prescriptive and where do they provide the Board and Department flexibility?**

HB 2007 (2025) is prescriptive about the entities eligible to apply for the grants, items that must be included in grant applications, and prioritizing serving students with the lowest rates of

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reading proficiency using research-aligned literacy strategies and focused interventions. HB 2007 provides the Board and Department flexibility in designing the application and award process and the length of the grants.

3. Has this item come before the Board before? If so, when did the Board last take action, and what was that action?

The Board previously passed temporary rules on the funding formula for the 2024 State Summer Learning Grant under HB 4082 (2024). The State Summer Learning Grant has now been established as an ongoing program by HB 2007 (2025) and the September 2025 State Board of Education meeting was the first time these rules have come before the Board.

4. Why is this item coming before the Board now?

HB 2007 (2025) created the State Summer Learning Grant program and ODE must establish permanent administrative rules to guide its implementation. These rules are necessary to define key terms, establish prioritization criteria, outline the application and funding process, and set the term length of grant awards. Without permanent rules, ODE cannot equitably and transparently administer grants, ensure statewide alignment with legislative intent, or provide clear guidance to eligible entities. The proposed rules will provide the foundational framework for awarding multi-year summer learning grants, supporting high-quality, equitable programming across the state.

5. Who requested or brought about the need for this item? (Select all that apply.)

- ODE Staff
- Students
- Families
- Community-Based Organizations
- Culturally Specific Organizations
- School Districts
- Education Service Districts
- Charter Schools
- Oregon State Legislature
- Educational Associations
- Racial Justice Council
- Federal Government
- One or more of Oregon’s nine federally recognized tribes: _____
- Other: _____

ENGAGEMENT STRATEGY AND LEARNINGS

The State Board of Education expects all items that come before it be reviewed and influenced, to the greatest extent possible, by a robust community engagement process. Using plain language, this section should provide an overview of the role that engagement played in this item, including with Oregon’s nine federally recognized Tribes, other state agencies, and external partners.

6. How did the [Equity Decision Tree](#) inform your office/team engagement strategy? Who is most likely to be affected and how have they been intentionally incorporated into the engagement process for this item?

ODE used the Equity Decision Tree to center students furthest from opportunity, along with small and rural districts, Tribes, and community-based partners. In August-September 2025, ODE held three public engagement sessions, multiple targeted meetings, and surveys with stakeholders including the HB 4082 Workgroup, school districts of all sizes, ESDs, charters, CBOs, culturally specific organizations, advocacy groups, and past grantees. Tribal partners were engaged through Government-to-Government communication in coordination with the Office of Indian Education.

Two-Phase Rulemaking Approach

Stakeholders affirmed ODE’s phased rulemaking strategy:

- **Phase 1 (Fall 2025):** Foundation rules on award process and grant term to provide clarity and allow earlier awards for summer 2026 (targeting January-February).
- **Phase 2 (2026–27):** Comprehensive policy on program quality, evaluation, partnerships, and professional development, guided by the Expanded Learning Advisory Committee.

Key Themes from Engagement

- **Award Process:** Stakeholders strongly supported a transparent, two-step process that combines statutory prioritization of English Language Arts (ELA) proficiency rates with a peer review panel to elevate quality, feasibility, and research-aligned program design. They emphasized reducing barriers for small and rural applicants by simplifying applications, providing templates, and offering direct technical assistance. There was broad consensus that award amounts must be “right-sized” to match local context, program duration, and student reach.
- **Grant Term:** Nearly all stakeholders called for multi-year grants to stabilize staffing, allow time for partnerships, and improve program sustainability. A three-year minimum was widely supported, with five years identified as important for system change and long-term results.
- **Equity and Distribution:** Feedback highlighted the need to balance statewide ELA proficiency data with local indicators such as attendance, poverty, rural isolation, numbers of students served, and student demographics. Stakeholders also urged explicit prioritization of Tribal and underserved student groups, alongside safeguards to ensure geographic equity.

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7. After consulting with ODE’s Rules Coordinator and the Office of Indian Education, did this item require Tribal Consultation and/or Tribal Communication with Oregon’s nine federally recognized tribes? (For more information, please reference ODE’s [Tribal Consultation Toolkit.](#))
- No
 - Yes – Both Consultation and Communication.
 - Yes – Only Communication.
8. Has your office/team considered how this item intersects with the authority of other state entities that serve the health and education needs of Oregon’s students, or otherwise contribute to the climate of Oregon’s school systems? If so, please select from the below list.
- N/A; this item does not intersect with other state entities.
 - Oregon Health Authority (OHA)
 - Department of Early Learning and Care (DELIC; formerly ELD)
 - Educator Advancement Council (EAC)
 - Higher Education Coordinating Commission (HECC)
 - Youth Development Oregon (YDO)
 - Teacher Standards and Practices Commission (TSPC)
 - Oregon Housing and Community Services (OHCS)
 - Other: _____

If you selected any of the above entities, please share why they were involved, how the Department partnered with them, and what feedback they provided.

N/A

9. Which geographic perspectives are intentionally represented in your office/team engagement strategy?
- Northeast Oregon
 - Central and Southeast Oregon
 - Southwest Oregon
 - Willamette Valley and Central Coast
 - Northwest Oregon
 - Tribal lands
 - Other: _____

Why did your office/team focus on the above geographical perspective(s)?

ODE’s engagement intentionally included perspectives from every region of the state: urban, suburban, rural, and frontier communities, as well as Tribal lands because the HB 4082 Workgroup set a clear charge that *every Oregon school district should have access to a high-quality summer learning program*. To achieve this vision, statewide feedback was essential to understand the different needs, cost drivers, and program delivery models across regions.

Small and rural districts highlighted the need for simplified applications and technical assistance; large districts emphasized sustainability and right-sizing of awards; and Tribal partners underscored the importance of culturally responsive and community-driven programming. By incorporating voices from across Oregon’s geography, the rulemaking process reflects both the legislative intent of HB 2007 and the equity commitments embedded in the HB 4082 Workgroup recommendations.

10. Please highlight some of the key pieces of feedback your office/team received during the engagement process. How did this feedback influence the development of this item? How were differences in opinion accounted for?

Stakeholders emphasized the need for earlier awards, ideally in January or February, so districts and partners have time to plan. This directly shaped the decision to focus Phase 1 rulemaking on the award process and grant term, ensuring funds can be awarded earlier for summer 2026.

There was strong support for multi-year grants, with most recommending at least three years and many urging five years to allow for deeper system change. This feedback led to the inclusion of flexible multi-year terms in the draft rules.

Partners also called for right-sized awards that match program scope and student reach, recognizing Oregon’s wide variation in district size and costs (such as transportation and staffing). As a result, the rules allow ODE to adjust requested award amounts to promote fairness and equity.

Stakeholders further highlighted the need to balance statewide ELA proficiency data with local indicators, including attendance, poverty, rural isolation, and demographics. This shaped rules that combine statutory prioritization with review panel scoring, so both need and program quality are considered.

Differences in Opinion

- Large districts urged higher maximum awards, noting \$1 million may reach only a small share of their students.
- Small districts and partners asked for a lower maximum award and safeguards to prevent disproportionate funding for large districts and to reduce disadvantages in competing for grants.
- Views also differed on whether funding should prioritize geographic distribution or the number of students served.

To balance these perspectives, the Department adopted a hybrid award model. This approach blends statutory prioritization, peer review of quality, right-sizing of awards, and a geographic equity safety net. Together, these elements reflect broad input while ensuring equitable access statewide.

11. Please describe any additional engagement opportunities your office/team will be pursuing prior to asking the Board to take action on this item.

Between the first read and second read/adoption, ODE will continue targeted engagement with key partners. This includes direct consultation with Oregon’s nine federally recognized Tribes through Government-to-Government processes, follow-up conversations with small and rural districts to address capacity needs, and continued communication with the HB 4082 Workgroup and statewide partners to gather feedback and refine implementation guidance. These opportunities will ensure that perspectives from across Oregon are incorporated into final rulemaking and that the field is prepared to plan for summer 2026.

FISCAL AND ADMINISTRATIVE IMPACT ANALYSIS

Equitable resource allocation is a critical component of education equity. Using plain language, this section should describe the fiscal, administrative, and small business impacts of this item, and how it affects the larger social system that serves Oregon’s students.

12. After consulting with ODE’s Rules Coordinator and Grant Consolidation Team, was this item identified as a grant-related item?

- No
- Yes; please review Appendix B: Grant Consolidation below.

13. Will Board action create fiscal or administrative impacts on districts, ESDs, community-based organizations, and/or the nine federally recognized tribes? If so, please describe the anticipated short- and long-term effects and how they may be felt differently in small, rural, or remote communities.

Yes. Board action will create both short- and long-term fiscal and administrative impacts.

- **Short-term:** Districts, ESDs, community partners, and Tribes will need to complete applications and reporting under the new rules. While this creates some administrative work, aligning processes with existing ODE grant systems reduces duplication. Small and rural communities may feel this burden more acutely due to limited staff capacity.
- **Long-term:** Multi-year, predictable funding will reduce administrative strain by ending the cycle of annual uncertainty and short planning windows. Stable awards will support sustainable staffing, allow deeper partnerships with youth serving entities, and give programs the ability to design high-quality summer learning experiences. For small, rural communities, the benefit of long-term stability is especially significant, as certainty enables advanced planning and reduces the burnout caused by last-minute implementation.

Overall, while the rules introduce some near-term administrative impacts, they are expected to deliver greater efficiency, effectiveness, equity, and sustainability over time.

- 14. Will Board action create a fiscal or administrative impact on state agencies, units of local government, and/or the public? Will it increase costs associated with compliance for small businesses?**

Board action will not create a fiscal or administrative impact on state agencies, local governments, or the public. It will also not increase costs for small businesses.

EQUITY IMPACT ANALYSIS

The State Board of Education envisions an aspirational education system that honors its increasingly diverse student body and affirms every student to reach their full potential in a rapidly shifting global environment. Using plain language, this section should describe the impact of this item on students and the larger social system that serves their health and education needs.

- 15. How will Board action on this item ultimately impact students and their families, particularly those who have been and continue to be systemically marginalized?**

Board action will expand access to high-quality summer learning for students and families across Oregon, with a particular focus on those who have been systemically marginalized. By prioritizing students not yet proficient in English Language Arts and embedding equity safeguards, the rules ensure that resources reach rural, Tribal, multilingual, low-income, and historically underserved youth. Families will benefit from more predictable, multi-year funding that allows districts and community partners to offer consistent, culturally responsive programs designed to build literacy skills, belonging, and enrichment opportunities. For students, this means greater access to safe, engaging learning environments that strengthen academic growth, foster curiosity, and support social-emotional well-being, helping close opportunity gaps that have long persisted in Oregon.

- 16. How will Board action on this item ultimately impact school district employees and volunteers, particularly those who have been and continue to be systemically marginalized?**

Board action will provide stability for school district employees and volunteers by establishing multi-year summer learning grants that reduce the cycle of last-minute planning and uncertainty. Predictable funding will support sustainable staffing, professional development, and retention; benefits that are especially critical for educators, classified staff, and volunteers in small, rural, and high-need districts where capacity is limited. For employees and volunteers from systemically marginalized communities, the rules also create more opportunities to engage in culturally responsive programming, build stronger partnerships with community-based organizations and Tribes, and contribute to equitable student outcomes. Over time, this stability is expected to reduce burnout, foster inclusive professional growth, and strengthen the workforce that supports Oregon's students.

17. What are the anticipated short- and long-term consequences of Board action on this item? Will Board action have a cumulative effect on students, families, educators, districts, or Oregon’s school systems?

Short-term: Adoption of these rules will provide clarity on the award process and grant length, reducing uncertainty for districts, ESDs, CBOs, and Tribes as they prepare for summer 2026. Students and families will see more timely communication about program availability, while staff will experience greater predictability in planning and hiring.

Long-term: Multi-year, transparent grantmaking will strengthen Oregon’s educational ecosystem by stabilizing staffing, fostering durable partnerships, and enabling higher-quality summer learning experiences. The cumulative effect will be greater equity of access, particularly for rural, Tribal, and systemically marginalized communities. Over time, sustained summer learning opportunities will help close academic gaps, improve attendance and engagement, and build a stronger statewide infrastructure for expanded learning.

18. What are the anticipated short- and long-term consequences of inaction on this item and who would experience those consequences?

Without Board action, ODE cannot implement a clear award process, leaving districts, Tribes, and partners with late awards and limited planning time. Small, rural, and systemically marginalized communities would be hit hardest, and students would lose consistent access to high-quality summer learning.

RECOMMENDED ACTION

The State Board of Education has dedicated itself to challenging the status quo and sharing responsibility for every student’s academic and lifelong success. Using plain language, this section should describe the choice before the Board, the Department’s recommendation, and any other relevant information.

19. Please provide a brief summary of the specific language your office/team is bringing to the Board. Are there any key decisions within this language that your office/team would like the Board to make?

The Department is bringing forward draft rules (OAR 581-017-3000 through 3035) to implement the State Summer Learning Grant established under HB 2007 (2025). The rules:

- **Define eligible entities** (school districts, charter schools, ESDs, Tribes, or consortia)
- **Establish the application process** and require use of a peer review panel with a transparent scoring rubric.
- **Create a two-step award process:** statutory prioritization points (ELA proficiency and student need) combined with review panel scoring to ensure quality.
- **Set funding parameters**, including a \$1 million annual maximum per grantee, authority for ODE to right-size awards, and a safety net provision to ensure geographic equity.

- **Specify grant term lengths** of 3-5 years to support sustainability.
- **Outline reporting requirements** (due annually by November 15) and allowable administrative costs.

Key Board Considerations

ODE is seeking Board feedback and considerations on the proposed award process, grant term, and funding structure. This input will inform revisions, and the Department will return with a final version of the rules for adoption at the October State Board of Education meeting.

20. How is this language responsive to identified needs and/or feedback received through the engagement process? How is it in alignment with [the Board's Mission, Vision, and Values](#)?

The draft rules directly respond to feedback from statewide engagement and the HB 4082 Workgroup. Stakeholders emphasized the need for earlier awards, multi-year grants, and right-sized funding that accounts for district size, cost drivers, and student reach. They also urged balancing statewide ELA proficiency data with local context and explicitly prioritizing Tribal and underserved student groups. This feedback is embedded in the proposed two-step award process, flexible grant terms, and equity safeguards.

The rules are also aligned with the Board's Mission, Vision, and Values:

- **Mission:** By creating equitable access to high-quality summer learning, the rules help improve student learning and ensure accountability in state-funded programs.
- **Vision:** By stabilizing funding and centering students furthest from opportunity, the rules advance a future where all Oregon students are supported to learn, grow, and thrive.
- **Values:** The rules uphold **equity** by addressing barriers for small, rural, and systemically marginalized communities; **excellence** by elevating research-aligned literacy practices and program quality; **accountability** through transparent processes and reporting; and **belonging** by supporting culturally responsive, partnership-driven programming.

Together, these rules reflect both community voice and the Board's guiding framework, moving Oregon toward a coordinated, equitable system of summer learning.

21. Please describe the action your office/team is recommending to the Board (for example, the adoption of rules or the approval of a waiver) and how it reflects the Department's commitment to academic excellence, belonging and wellness, and reimagining accountability.

At this stage, the Department is requesting that the Board review and provide feedback on the draft administrative rules (OAR 581-017-3000 through 3035) for the State Summer Learning Grant established under HB 2007 (2025). This feedback will guide refinements before the

Department brings a final version back for adoption at the October State Board of Education meeting.

This step reflects the Department’s commitment to the following:

- **Academic Excellence:** Draft rules prioritize research-aligned literacy practices while allowing for enrichment and holistic youth development.
- **Belonging and Wellness:** Equity safeguards ensure rural, Tribal, and underserved students have access to safe, supportive, and culturally responsive summer programs.
- **Reimagining Accountability:** The proposed hybrid award model combines statutory prioritization, peer review, and right-sizing of awards. This approach emphasizes transparency and equity while focusing on outcomes, aligning directly with the Department’s accountability initiative.

Seeking feedback now ensures that the final rules align with both community voice and the Board’s mission, vision, and values.

22. Please note any additional support the Department is (or will be) providing to ensure successful implementation of this item.

- N/A; this item does not require any additional support.
- Communications plan
- Technical assistance, professional development, and/or coaching
- Direct or differentiated support for small, rural, or remote school districts
- Corrective Action Processes
- Safety measures
- Organizational culture or practice changes (change management)
- Materials and/or supplies
- Guidance and/or supplemental resources
- Other: _____

23. Has this item changed since the last Board meeting?

- N/A; this item has not previously been before the Board
- No; same as last month
- Yes; please review Appendix A: Second Reading below.

APPENDIX B: GRANT CONSOLIDATION

Appendix B should only be completed if “yes” is selected for question 12. Using plain language, this section should provide additional detail on how grant rules have been aligned and designed to support districts and meet administrative needs.

1. Please indicate which of the following underlying processes are required for this grant program.

- Conduct a needs assessment
- Gather and provide additional data
- Submit an application to ODE
- Submit a report to ODE
- Submit a plan to ODE
- Submit a budget to ODE
- Conduct community engagement
- Other: _____

2. How has your team/office worked to encourage more equitable resource allocation and address administrative impacts, particularly for small or rural school districts? How has this grant been aligned with existing grant programs?

The Department has worked to design an application process that balances data-driven prioritization with peer review of applications to ensure all eligible entities have a chance of being awarded a grant regardless of district size or geographic location. The Department plans to make the application form as simple as possible while also gathering the information necessary to make informed grant award decisions. Templates, examples, and the application scoring rubric will also be provided to applicants at the opening of the application period. The rules are designed to allow ODE to elevate local indicators (such as poverty, rural isolation, and student demographics) in application review, set a \$1 million annual maximum per grantee, and right-size award amounts to ensure equitable resource allocation. This grant has also been designed to align with the federal 21st Century Community Learning Centers grant and the Student Success Act Summer Program grant to lessen administrative burden.

3. How are the grant requirements differentiated for small and rural school districts?

The draft rules are designed to reduce barriers for small and rural applicants by keeping application requirements streamlined and aligned with existing ODE processes. The rules also include a safety net provision that allows ODE to adjust final scores to ensure equitable distribution of funds across geographic areas, protecting rural communities from being disadvantaged in a competitive process. In addition, the Department will provide differentiated technical assistance and train reviewers to recognize the unique challenges and cost drivers in rural contexts, such as transportation, staffing, and limited administrative capacity. Together, these measures ensure rural communities are evaluated equitably alongside larger, urban districts and have a fair opportunity to access funds.



HB 2007 (2025) Bill Implementation: State Summer Learning Grant

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Raquel Gwynn, Director of Expanded Learning
Savanah Solario, Program Improvement Analyst

Rulemaking: A Two-Phase Approach



Summer 2025: Astoria SD students reaching for books that will be read, re-read, and shared with loved ones at home.

Why Rules Are Needed Now:

To ensure the State Summer Learning Grant Program is equitable, transparent, and aligned with legislative intent, while giving grantees the lead time needed to plan for summer 2026.

Phase 1: Foundation Rules (Adoption Oct 2025)

Define grant award process

Determine grant length

- Establish longer timeline for grantee planning for summer 2026 and beyond

Phase 2: Comprehensive Policy Development (2026-27)

Address program quality indicators, evaluation, partnerships, professional development, and definitions

- In partnership with an Expanded Learning Advisory Committee
- Process informed by HB 4082 Final Study and Workgroup recommendations

Summary of State Summer Learning Grant Rules

Rule	Summary
581-017-3000: Definitions	Defines key terms and eligible entities
581-017-3005: Application	Establishes application submission and review process, including consortium options
581-017-3010: Prioritization	Establishes prioritization points and calculation of overall application score
581-017-3015: ESDs	Outlines ESD application options and prioritization point calculations
581-017-3020: Tribes	Outlines application process for Tribes
581-017-3025: Funding	Sets maximum grant award, ranks applications by score, and ensures equitable statewide distribution
581-017-3030: Reporting	Requires annual reports submitted to ODE by November 15
581-017-3035: Additional Requirements and Qualifications	Establishes grant term of 3-5 years, peer reviewer criteria, and clarifies administrative cost limits

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State Summer Learning Grant: Engagement Strategy



Summer 2025: Dr. Williams guiding a North Marion SD student through poetry writing.

How We Engaged

- **August 2025:** 3 Public Sessions, 5+ Targeted Sessions, Oregon Rules Community Advisory (ORCA) Presentation
- **Methods:** Facilitated Discussions, Open Q&A, Surveys

Who We Engaged

- School Districts, ESDs, Charters
 - Urban, Suburban, Rural, Frontier
 - Small, Medium, Large
 - Superintendents, Summer Program Staff, Licensed & Classified Staff
- Current & Past Summer Learning grantees
- Tribes
- HB 4082 Workgroup
- Summit Attendees
- COSA
- OAESD
- Community Based Organizations
- Youth Serving Entities

Connection to Broader Systems

- **Early Literacy** Success initiative
- **HB 4082 Workgroup** Recommendations

Engagement: Differences in Opinion

Subject	Perspective A	Perspective B
\$1M Maximum Grant Award	\$1M may only serve a small share of students in large districts; Suggested higher maximum award to serve more students	\$1M may lead to disproportionate funding for large districts; Suggested lower maximum award to reduce disadvantages in competing for grants
Funding Prioritization	Funding should prioritize serving the highest number of students	Funding should prioritize equitable geographic distribution of grantees

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ODE Response: Draft rules propose a hybrid model that blends statutory priorities, local needs and context, peer review, right-sizing awards, and a geographic equity safety net.

Integrating Feedback

Adjustments Made Based on Feedback

- Specified **peer** review panel
- Added rules for Peer Reviewers to ensure:
 - Relevant expertise & impartiality
 - Signed conflict-of-interest and confidentiality agreements
 - Reimbursement for meals, travel, and lodging as appropriate
 - Honorarium for service, when state funds are available

What We Didn't Change (And Why)

- No change to the \$1M cap
 - Historically, awards >\$1M have resulted in returned funds
 - ODE has ability to right-size awards, ensuring broad distribution across the state
- Other feedback was more specific than what belongs in rule but will be included in guidance and implementation.

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State Summer Learning Grant: Equity Impact

Student Impact

- Expands access to high-quality summer learning for **students furthest from educational justice**, including students not yet reading at grade level, rural, Tribal, multilingual, and historically underserved youth.
- Supports development of **belonging, curiosity, and problem-solving**, alongside **evidence-based literacy** instruction to mitigate summer slide and increase student growth and achievement.

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Collaboration and Partnership

- Values **partnerships between grantees and their community** strengthening local networks of care and learning.

Geographic Equity

- Recognizes different needs across **urban, suburban, rural, and frontier communities**.
- Creates **flexibility in program design** so communities can adapt services, structures, and delivery models to their local contexts and needs.

State Summer Learning Grant: Fiscal Impact

Grantee Impacts

- **Predictable multi-year** structure supports sustainable staffing, planning, and program quality without increasing administrative burden with last minute funding.
- **Reduces uncertainty** and supports **equitable access to funds**.

Community Impacts

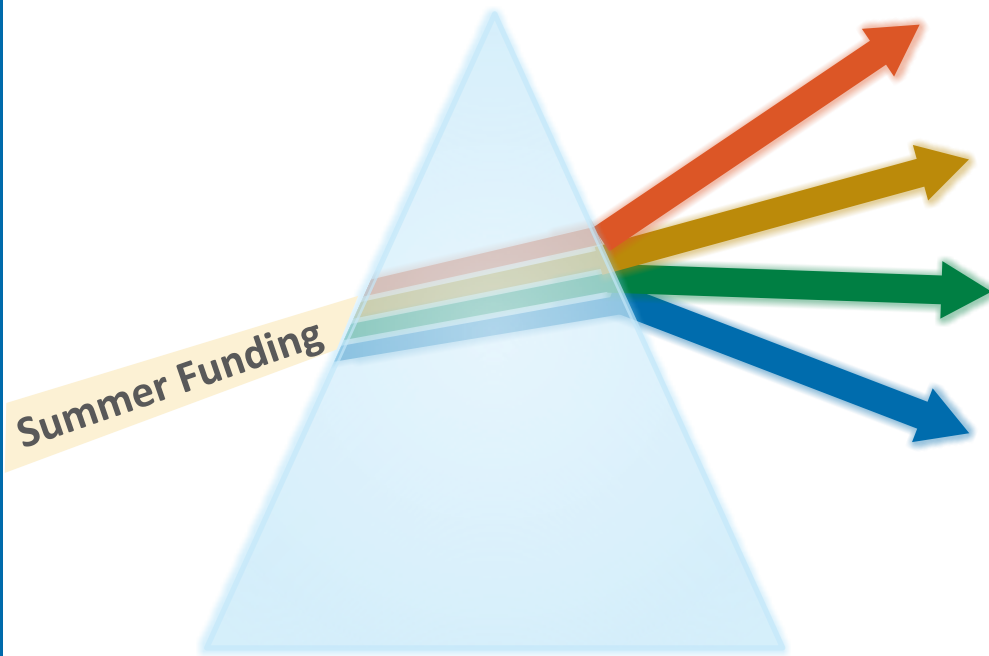
- **Families** can rely on no cost, stable, and consistent high-quality summer learning programs.
- **Small businesses, community organizations, and youth serving entities** benefit from contracted services that can span years.

Equity & Geographic Considerations

- Rules encourage **equitable resource allocation** by embedding equity weights, right-sizing awards, and considering geographic cost drivers (e.g., transportation, staffing, partnerships).

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One Investment, Many Outcomes:



High-Quality Learning Experiences

- Increase literacy growth
- Prevent summer slide
- Support credit attainment

Student Engagement

- Spark curiosity and love of learning¹⁵²
- Foster belonging, safety, well-being

Engaged Partners and Communities

- Leverage community assets
- Expand family-school connections

Committed and Supported Staff

- Build educator pipelines
- Strengthen collaboration and professional learning



**HB 2007 in
Action:
2025 State
Summer
Learning
Programs**

581-017-3000 State Summer Learning Grant: Definitions

The definitions in this section apply to OAR 581-017-3000 through OAR 581-017-3035.

- (1) "Department" means the Oregon Department of Education.
- (2) "Eligible Entity" means a School District, Charter School, ESD, or Tribe, or any consortium of these entities, that meets the requirements under Section 1(2) and (3) of HB 2007 (2025).
- (3) "Education Service District" or "ESD" means a service district organized under ORS Chapter 334.
- (4) "Charter School" means a school organized under ORS 338.
- (5) "School District" means a district organized under ORS Chapter 332.
- (6) "Summer Learning Program" means a program funded with grants provided under HB 2007 (2025).
- (7) "Tribe" means a federally recognized Indian tribe in Oregon:
 - (a) Burns Paiute Tribe;
 - (b) Confederated Tribes of Coos, Lower Umpqua, and Siuslaw Indians;
 - (c) Confederated Tribes of Grand Ronde;
 - (d) Confederated Tribes of Siletz Indians;
 - (e) Confederated Tribes of the Umatilla Indian Reservation;
 - (f) Confederated Tribes of the Warm Springs Reservation;
 - (g) Coquille Indian Tribe;
 - (h) Cow Creek Band of Umpqua Tribe of Indians; and
 - (i) Klamath Tribes.

Statutory/Other Authority: HB 2007 (2025)

Statutes/Other Implemented: HB 2007 (2025)

581-017-3005 State Summer Learning Grant: Application

- (1) Eligible Entities shall apply in a form and manner required by the Department.
- (2) An application must include:
 - (a) The requirements listed in Section 1(4)(b) of HB 2007 (2025); and
 - (b) Additional requirements as provided by the Department to prioritize applications.
- (3) The Department shall evaluate the applications through a peer review panel process as established by the Department. The peer review panel shall be established as provided in OAR 581-017-3035(4).

(4) The Department shall establish a scoring rubric for the peer review panel evaluation of the applications and publish the scoring rubric at the opening of the application period.

(5) Eligible Entities may submit a consortium application where more than one Eligible Entity applies under one application.

(6) An individual Eligible Entity shall only apply once, whether individually or as part of a consortium, per Summer Learning Grant cycle.

Statutory/Other Authority: HB 2007 (2025)

Statutes/Other Implemented: HB 2007 (2025)

581-017-3010 State Summer Learning Grant: Prioritization

(1) For the purpose of awarding State Summer Learning Grants, the Department shall develop prioritization points that:

(a) Include all prioritization factors stated in Section 1(5) of HB 2007(2025); and

(b) Include other prioritization factors as determined by the Department.

(2) The Department shall provide the calculated prioritization points to Eligible Entities upon the opening of the application period.

(3) For School Districts or Charter Schools that apply as a consortium with other School Districts or Charter Schools, the consortium will receive prioritization points equal to the highest priority points of an individual member in the consortium.

(4) The Department shall combine the prioritization points with the application's peer review panel score to reach a final application score.

(5) The Department shall use the final application score to rank applications for funding decisions.

(6) The Department's prioritization determinations shall be final.

Statutory/Other Authority: HB 2007 (2025)

Statutes/Other Implemented: HB 2007 (2025)

581-017-3015 State Summer Learning Grant: Education Service Districts

(1) Eligible Entities that are ESDs may apply for a State Summer Learning Grant as follows:

(a) As an individual entity to provide Summer Learning Programs directly to students;

(b) As a consortium with one or more other ESDs to provide Summer Learning Programs directly to students; or

(c) As a consortium with one or more School Districts or Charter Schools to provide administrative support to School Districts or Charter Schools that provide Summer Learning Programs directly to students.

(2) An individual ESD's prioritization points shall be calculated based on the average of their component School Districts' data.

(3) The final application score for an ESD shall be calculated based on the type of application submitted by the ESD as follows:

(a) ESDs that apply as individual entities will receive prioritization points as calculated in section (2) above;

(b) For ESDs that apply as a consortium with other ESDs, the consortium will receive prioritization points equal to the highest prioritization points of an individual ESD in the consortium; or

(c) For ESDs that apply as a consortium with School Districts or Charter Schools, the consortium will receive prioritization points equal to the highest prioritization points of an individual School District or Charter School in the consortium.

(4) ESDs that receive a State Summer Learning Grant shall comply with all other requirements of the grant and these rules along with other Eligible Entities.

Statutory/Other Authority: HB 2007 (2025)

Statutes/Other Implemented: HB 2007 (2025)

581-017-3020 State Summer Learning Grant: Tribes

(1) Eligible Entities that are Tribes shall:

(a) Submit an application in a form and manner determined by the Department; and

(b) Apply following the same application dates as other Eligible Entities.

(2) A Tribe may submit an application ahead of the application date to the Department and to the extent practicable, the Department shall review the application and collaborate with the Tribe to develop a final application that shall be submitted by the application due date.

(3) The Department may reduce an award granted to an approved application from a Tribe as provided in OAR 581-017-3025(4).

(4) Tribes that receive a State Summer Learning Grant shall comply with all requirements of the grant and these rules along with other Eligible Entities.

Statutory/Other Authority: HB 2007 (2025)

Statutes/Other Implemented: HB 2007 (2025)

581-017-3025 State Summer Learning Grant: Funding

(1) The maximum amount an Eligible Entity shall receive under this grant is \$1,000,000.00 per year.

(2) Eligible Entities shall, as part of their application, request the total amount of funds they need to successfully provide a Summer Learning Program each year of the grant.

(3) The Department shall review all funding requests by Eligible Entities.

(4) The Department may, in its discretion, reduce a grant award from the requested amount based on the needs of the program, peer review panel feedback, and other criteria identified by the Department.

(5) Based on the final application score described in OAR 581-017-3010, the Department shall rank final applications in order of highest score to lowest score.

(6) The Department may revise final application scores to ensure equitable distribution of funding among the geographic areas within the state. If the Department revises final application scores, the Department shall reorder the scores from highest to lowest.

(7) The Department shall award grants from the highest score down until all State Summer Learning Grant funds are awarded.

(8) Subject to funding provided by the Legislature, the Department shall award funding to each Eligible Entity with a grant agreement that provides for multiple years of programming.

Statutory/Other Authority: HB 2007 (2025)

Statutes/Other Implemented: HB 2007 (2025)

581-017-3030 State Summer Learning Grant: Reporting

(1) Eligible Entities shall report in a form and manner required by the Department, the results of their Summer Learning Programming including:

(a) The requirements listed in Section 1(7) of HB 2007 (2025); and

(b) Other requirements determined by the Department that are necessary for program reporting and improvement.

(2) Eligible Entities shall submit their reports by November 15 each year. If November 15 falls on a holiday or weekend, then Eligible Entities shall submit their reports by the next business day.

Statutory/Other Authority: HB 2007 (2025)

Statutes/Other Implemented: HB 2007 (2025)

581-017-3035 State Summer Learning Grant: Additional Requirements and Qualifications

(1) Each grant shall be awarded for a period of not less than 3 years and not more than 5 years.

(2) Eligible administrative expenses shall include:

(a) No limit on administrative expenses of a partner organization described under Section 1(4)(c) of HB 2007 (2025); and

(b) A maximum of 10% of the total grant amount for an Eligible Entity providing services under the grant.

(3) Eligible transportation costs are not considered administrative costs for purposes of Section (2) above.

(4) Peer review panel members shall:

(a) Be selected by the Department through a process that ensures relevant expertise and impartiality; and

(b) Sign a conflict-of-interest and confidentiality statement prior to service. Any peer review panel member determined to have a disqualifying conflict of interest shall be ineligible for service.

(5) Peer review panel members may:

(a) Receive reimbursement for meals and travel (including lodging where appropriate) in accordance with state policies for expenses incurred in participating in the application scoring process; and

(b) Receive an honorarium upon completion of all duties as assigned including attending training sessions and scoring assigned applications. The honorarium is to be determined based on current Department fees paid for similar tasks.

Statutory/Other Authority: HB 2007 (2025)

Statutes/Other Implemented: HB 2007 (2025)

Summary

Meeting Date: 10/16/2025

Title: Strengthening and Expanding Instructional Materials:
Removing Publisher Fees

Status: First Reading

Presentation: Yes

Key Staff: Sasha Grenier and Vanessa Martinez

Topic Summary: Repealed and amended rules in response to Section 27 of SB 141, which eliminated the publisher fee system that supported ODE’s instructional materials program and replaced it with legislative funding.

ODE Education Equity

Stance

Education equity is the equitable implementation of policy, practices, procedures, and legislation that translates into resource allocation, education rigor, and opportunities for historically and currently marginalized youth, students, and families including civil rights protected classes. This means the restructuring and dismantling of systems and institutions that create the dichotomy of beneficiaries and the oppressed and marginalized.

BACKGROUND AND NEED

Members of the State Board of Education are volunteers, with unique professional and lived experiences. Using plain language, this section should provide context for this item, including any needed overviews of relevant programs or initiatives.

- 1. Briefly, how does this topic, program, or initiative currently operate? Where is it located within Oregon’s school systems? How does it ultimately serve students?**

ODE’s instructional materials program runs an evaluation for each content area and recommends a list of materials to the State Board of Education. This evaluation process takes approximately 18 months and begins after the Board adopts content Standards for each content area. During this process, a criteria document is developed by a statewide panel of experts and educators, recruited from across Oregon. ODE then issues a notice to publishers which includes the criteria and an invitation to submit instructional materials. If publishers chose to submit, they pay a fee for their submissions, in alignment with the process and amounts outlined in ORS 337.065 and OAR 581-011-0090. These materials are then reviewed by a statewide panel of educators and experts, using the criteria and instructional materials evaluation tool. The list of instructional materials that passes this panel’s evaluation, is presented to the Boars for adoption, and published to the Instructional Materials Webpage. School districts then have a year to either select from this list or complete an independent adoption before beginning implementation.

Oregon State Board of Education Docket



The fees collected from publisher submissions fund this evaluation process, including compensation for evaluator time, the cost of convenings, and instructional materials caravans, and other related expenses.

- 2. Please list the specific rule(s), statute(s), or recently passed legislation that allows the Board to take action on this item. Where are they prescriptive and where do they provide the Board and Department flexibility?**

Section 27 of SB 141, passed in 2025. This section repealed ORS 337.065, the statute that described requirements related to the process of collecting publisher fees for submitting materials, and provided \$500,000 per biennium to the instructional materials program. As a result, the passage of SB 141 eliminated the publisher fee system and replaced it with a program funded by the legislature per biennium. Thus, SB 141 necessitates repealing and amending all Oregon Administrative Rules that rely on the statutory authority of ORS 337.065 and name or regulate the publisher fee system.

- 3. Has this item come before the Board before? If so, when did the Board last take action, and what was that action?**

No.

- 4. Why is this item coming before the Board now?**

SB 141 came into effect on June 24, 2025. Section 27 of this statute repealed ORS 337.065, the statute that described requirements related to the process of collecting publisher fees for submitting materials, thus eliminating the publisher fee system. Thus, SB 141 necessitates the immediate repeal and amending of all Oregon Administrative Rules that rely on the statutory authority of ORS 337.065 and name or regulate the publisher fee system.

This fundamental change to how the instructional materials program operates also will entail a redesign of the instructional materials evaluation and adoption process. This work will require planning and engagement that will continue through the Spring of 2026.

- 5. Who requested or brought about the need for this item? (Select all that apply.)**

- ODE Staff
- Students
- Families
- Community-Based Organizations
- Culturally Specific Organizations
- School Districts

Oregon State Board of Education Docket



- Education Service Districts
- Charter Schools
- Oregon State Legislature
- Educational Associations
- Racial Justice Council
- Federal Government
- One or more of Oregon’s nine federally recognized tribes: _____
- Other: _____

ENGAGEMENT STRATEGY AND LEARNINGS

The State Board of Education expects all items that come before it be reviewed and influenced, to the greatest extent possible, by a robust community engagement process. Using plain language, this section should provide an overview of the role that engagement played in this item, including with Oregon’s nine federally recognized Tribes, other state agencies, and external partners.

6. How did the [Equity Decision Tree](#) inform your office/team engagement strategy? Who is most likely to be affected and how have they been intentionally incorporated into the engagement process for this item?

ODE convened a focal group to review proposed language. The group affirmed that the language in the draft rules is clear and would fulfill the statutory requirements of Section 27 of SB 141.

7. After consulting with ODE’s Rules Coordinator and the Office of Indian Education, did this item require Tribal Consultation and/or Tribal Communication with Oregon’s nine federally recognized tribes? (For more information, please reference ODE’s [Tribal Consultation Toolkit](#).)

- No
- Yes – Both Consultation and Communication.
- Yes – Only Communication.

8. Has your office/team considered how this item intersects with the authority of other state entities that serve the health and education needs of Oregon’s students, or otherwise contribute to the climate of Oregon’s school systems? If so, please select from the below list.

- N/A; this item does not intersect with other state entities.
- Oregon Health Authority (OHA)
- Department of Early Learning and Care (DELIC; formerly ELD)
- Educator Advancement Council (EAC)
- Higher Education Coordinating Commission (HECC)
- Youth Development Oregon (YDO)
- Teacher Standards and Practices Commission (TSPC)
- Oregon Housing and Community Services (OHCS)

Oregon State Board of Education Docket



Other: _____

If you selected any of the above entities, please share why they were involved, how the Department partnered with them, and what feedback they provided.

Please enter your answer here

9. Which geographic perspectives are intentionally represented in your office/team engagement strategy?

- Northeast Oregon
- Central and Southeast Oregon
- Southwest Oregon
- Willamette Valley and Central Coast
- Northwest Oregon
- Tribal lands
- Other: _____

Why did your office/team focus on the above geographical perspective(s)?

We reached out to external partners including ESDs, OAESD, COSA, and internal ODE partners from multiple offices and teams.

10. Please highlight some of the key pieces of feedback your office/team received during the engagement process. How did this feedback influence the development of this item? How were differences in opinion accounted for?

Because the rule changes were simply a response to the statute and straightforward, the focal group that was convened affirmed that the rule changes were clear and aligned with the statutory requirements.

ODE also received questions and input that will inform future instructional materials program strengthening.

11. Please describe any additional engagement opportunities your office/team will be pursuing prior to asking the Board to take action on this item.

None.

FISCAL AND ADMINISTRATIVE IMPACT ANALYSIS

Equitable resource allocation is a critical component of education equity. Using plain language, this section should describe the fiscal, administrative, and small business impacts of this item, and how it affects the larger social system that serves Oregon's students.

12. After consulting with ODE’s Rules Coordinator and Grant Consolidation Team, was this item identified as a grant-related item?

No

Yes; please review Appendix B: Grant Consolidation below.

13. Will Board action create fiscal or administrative impacts on districts, ESDs, community-based organizations, and/or the nine federally recognized tribes? If so, please describe the anticipated short- and long-term effects and how they may be felt differently in small, rural, or remote communities.

The elimination of the publisher fee system will likely result in there being more options available for districts to choose from. This will result in districts having to conduct fewer independent adoptions, which can lead to greater coherence and will also have a positive fiscal impact on districts. More options on the state board approved lists will also provide more variety, including Open Educational Resources (OER) options, that are at different price points, potentially reducing the costs for districts.

14. Will Board action create a fiscal or administrative impact on state agencies, units of local government, and/or the public? Will it increase costs associated with compliance for small businesses?

Small businesses and local publishers may be more inclined to submit high quality instructional materials with less of a financial obstacle to do so.

EQUITY IMPACT ANALYSIS

The State Board of Education envisions an aspirational education system that honors its increasingly diverse student body and affirms every student to reach their full potential in a rapidly shifting global environment. Using plain language, this section should describe the impact of this item on students and the larger social system that serves their health and education needs.

15. How will Board action on this item ultimately impact students and their families, particularly those who have been and continue to be systemically marginalized?

By making it easier and more affordable to submit high-quality materials, ODE will likely receive more comprehensive materials that include multiple titles and texts that better equip educators to provide meaningful, scaffolded grade-level learning throughout a student’s school day, which has been shown to be especially effective for multilingual learners and special education students.

Oregon State Board of Education Docket



16. How will Board action on this item ultimately impact school district employees and volunteers, particularly those who have been and continue to be systemically marginalized?

The rule changes that are in response to Section 27 of SB 141 will have a positive impact on school districts that have fewer resources, including rural districts, and underserved students. By removing publisher fees, smaller publishers, including Open Educational Resources (OER) programs will be able to submit materials, expanding the options for districts to choose from and, consequently, better meeting the needs of their community. As a result, there will be less of a need for districts to do their own independent adoptions, which is time intensive, and a financial and labor cost to districts. Fewer independent adoptions will lead to more districts using the same state-adopted materials and allow ESDs to offer opportunities to support coherent implementation at a regional level.

17. What are the anticipated short- and long-term consequences of Board action on this item? Will Board action have a cumulative effect on students, families, educators, districts, or Oregon’s school systems?

These rule changes are necessary to align with the statutory change from Section 27 of SB 141.

18. What are the anticipated short- and long-term consequences of inaction on this item and who would experience those consequences?

These rule changes are prescribed by statute so are legally required. If the Board does not adopt these rules as proposed, ODE would present to the board during its next session with the proposed changes. If the Board disagrees with the statutory intent, there would have to be legislative action to amend Section 27 of SB 141.

RECOMMENDED ACTION

The State Board of Education has dedicated itself to challenging the status quo and sharing responsibility for every student’s academic and lifelong success. Using plain language, this section should describe the choice before the Board, the Department’s recommendation, and any other relevant information.

19. Please provide a brief summary of the specific language your office/team is bringing to the Board. Are there any key decisions within this language that your office/team would like the Board to make?

[581-011-0090](#) Repeal

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.]

Oregon State Board of Education Docket



(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.]*

[OAR 581-011-0055](#) Revision

Guidelines for the Selection of Instructional Materials Criteria Committees

(6) Travel, lodging, and meal expenses for committee meetings are to be reimbursed in accordance with state policy. *[From review fees collected by the Department of Education from publishers.]*

[OAR 581-011-0087](#) Revision

Digital, Electronic, or Web-based Materials and Media

(4)*[According to ORS 337.060 a publisher or other supplier who submits a proposal under 337.060 is required to pay a fee equal to the retail price expended by a school district during the length of the contract period, or \$50, whichever is greater, for each title or item of instructional material proposed by the publishers or supplier for review and adoption by the Board.] Bid proposals must include available retail price structures such as per-student, per-computer, subscription and other unit price structures and may include models where the cost is divided over multiple years and paid annually (as opposed to a single payment). [Bid proposal fees are payable prior to consideration of the proposal.]*

[OAR 581-011-0114](#) Revision

Instructional Materials Caravan

(1) The Oregon Department of Education, in cooperation with ESDs and School Districts throughout the state, may conduct an Instructional Materials Caravan.

(a) Publishers or suppliers whose materials were adopted by the State Board of Education in the Subject Matter Cycle may participate in the Caravan.

(b) The Department may require publishers to pay a fee to participate in the caravan. *[In addition to the bid submission fee charged for review according to ORS 337.065.]*

20. How is this language responsive to identified needs and/or feedback received through the engagement process? How is it in alignment with [the Board's Mission, Vision, and Values](#)?

The focal engagement group agreed that the rule language proposed above was clear.

21. Please describe the action your office/team is recommending to the Board (for example, the adoption of rules or the approval of a waiver) and how it reflects the Department’s commitment to academic excellence, belonging and wellness, and reimagining accountability.

Adopt the rule revisions and repeal in response to Section 27 of SB 141.

22. Please note any additional support the Department is (or will be) providing to ensure successful implementation of this item.

- N/A; this item does not require any additional support.
- Communications plan
- Technical assistance, professional development, and/or coaching
- Direct or differentiated support for small, rural, or remote school districts
- Corrective Action Processes
- Safety measures
- Organizational culture or practice changes (change management)
- Materials and/or supplies
- Guidance and/or supplemental resources
- Other: ODE will continue to plan and conduct engagement around the strengthening of the high-quality instructional materials program. We will return to the board with more rule changes in spring.

23. Has this item changed since the last Board meeting?

- N/A; this item has not previously been before the Board
- No; same as last month
- Yes; please review Appendix A: Second Reading below.

1) 581-011-0090 REPEAL

Assessment of Submission Fees

[(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.

Statutory/Other Authority: ORS 337.030, 337.035, 337.060, 337.065, 337.075 & 337.260

Statutes/Other Implemented: ORS 337.065]

History:

ODE 21-2022, amend filed 04/26/2022, effective 04/26/2022

ODE 3-2009, f. & cert. ef. 6-29-09

EB 5-1996, f. & cert. ef. 3-29-96

EB 21-1992, f. & cert. ef. 6-23-92

1EB 245, f. & ef. 9-23-76

1EB 215, f. 1-29-76, ef. 2-25-76]

2) 581-011-0055 REVISION

Guidelines for the Selection of Instructional Materials Criteria Committees

(1) Instructional materials criteria committees shall be appointed by and work under the supervision of the Oregon Department of Education.

(2) A criteria committee in each subject area for which state adoptions are planned shall be appointed the year preceding a state adoption. The committee shall recommend categories and draft criteria to be used in evaluating the instructional materials submitted for basal consideration.

(3) Committees shall conduct committee work in time to present the final draft of the criteria to the State Board of Education by the Board's January meeting in the year of the adoption.

(4) Each committee shall be chaired by the Department of Education specialist in the particular subject area for which criteria are being developed. In the event that there is not a staff specialist in a particular subject field, the Department shall obtain a specialist to serve as chair.

(5) Each committee shall include no less than five members selected from among Oregon classroom teachers, curriculum specialists, and others having experience and expertise in the subject area under consideration.

(6) Travel, lodging, and meal expenses for committee meetings are to be reimbursed in accordance with state policy *[from review fees collected by the Department of Education from publishers]*.

Statutory/Other Authority: ORS 337.035

Statutes/Other Implemented: ORS 337.035

History:

ODE 3-2009, f. & cert. ef. 6-29-09
EB 5-1996, f. & cert. ef. 3-29-96
EB 1-1992, f. & cert. ef. 2-21-92
1EB 245, f. & ef. 9-23-76
1EB 215, f. 1-29-76, ef. 2-25-76

3) 581-011-0087 REVISION

Digital, Electronic, or Web-based Materials and Media

(1) As indicated in OAR 581-011-0050(1) and (2), Instructional materials are defined as any organized system which constitutes the major instructional vehicle for a given course of study, or any part thereof. Instructional Material may include digital content or software in a format such as electronic and internet or web-based materials or media.

(2) Contract, review, and evaluation process involving digital, electronic, or web-based materials and media shall be the same as print materials.

(3) As stated in OAR 581-011-0086, the State Board of Education must approve the request of a publisher to substitute a more recent edition or version of any officially adopted material. However, software updates that improve functionality, performance, or accuracy are allowed if approved by the Department of Education. New and revised editions or versions must be sold at the same or lower price as those previously approved.

(4) *[According to ORS 337.060 a publisher or other supplier who submits a proposal under 337.060 is required to pay a fee equal to the retail price expended by a school district during the length of the contract period, or \$50, whichever is greater, for each title or item of instructional material proposed by the publishers or supplier for review and adoption by the Board].* Bid proposals must include available retail price structures such as per-student, per-computer, subscription and other unit price structures and may include models where the cost is divided over multiple years and paid annually (as opposed to a single payment). *[Bid proposal fees are payable prior to consideration of the proposal].*

(5) Materials that comply with the interoperability standards can be considered for adoption according to ORS 337.075.

(6) Materials shall be accessible consistent with OAR 581-015-2060, 581-022-2355, 581-022-2340, 581-022-2360, 581-011-0052 and compliant with all state or federal laws regarding accessibility. A publisher that offers digital, electronic, or web-based materials must provide an accessibility conformance report for each electronic component that documents adherence to the Web Content Accessibility Guidelines (WCAG) identified in the circular of information and technical standards required by the Federal Rehabilitation Act, Section 508. The report must be based on an audit testing a

random sampling of each different type of electronic component as outlined in each circular of information.

(7) Materials cannot include free or gratis equipment such as computer hardware, technology devices or equipment, which are intended to deliver or display the material but which are not instructional materials. This includes but is not limited to computers, laptops, handheld devices, microscopes, CD/DVD players, overhead or LCD projectors, electronic whiteboards, phone/music/transmitting and listening devices, and cameras.

(8) In accordance with ORS 337.090, if any publisher fails to carry out the provisions of the contract or with the intent to evade the provisions of the contract, sells any of the materials in this state at prices higher than specified in the contract of the publisher, the Board may, on behalf of the state, rescind the contract and notify the publisher thereof, or bring the appropriate action or suit to enforce the provisions of the publisher's bond or letter of credit, payable to the State of Oregon for the benefit of the Common School Fund.

Statutory/Other Authority: ORS 337.035

Statutes/Other Implemented: ORS 337.035

History:

ODE 31-2025, amend filed 06/16/2025, effective 06/16/2025

ODE 24-2023, amend filed 12/08/2023, effective 12/08/2023

ODE 27-2019, minor correction filed 08/07/2019, effective 08/07/2019

ODE 1-2010, f. & cert. ef. 2-8-10

ODE 3-2009, f. & cert. ef. 6-29-09

4) 581-011-0114 REVISION

Instructional Materials Caravan

(1) The Oregon Department of Education, in cooperation with Education Service Districts and School Districts throughout the state, may conduct an Instructional Materials Caravan.

(a) Publishers or suppliers whose materials were adopted by the State Board of Education in the Subject Matter Cycle may participate in the Caravan.

(b) The Department may require publishers to pay a fee to participate in the caravan *[in addition to the bid submission fee charged for review according to ORS 337.065]*.

(2) Publishers shall follow the guidelines of the caravan as established by the Department of Education.

- (a) Only Board adopted materials are to be presented, shown, or included in the Caravan.
- (b) Pupil editions, teacher editions (samplers included) and ancillaries, in any form can be reviewed by attendees but must be returned at the end of the presentation. No gifts, food items, gadgets, “doohickeys” or sample materials which include media are to be given to participants attending the presentations.
- (c) Pamphlets, brochures, catalogues, or two page reports describing the adopted program may be distributed including correlations to the Oregon Standards. Publisher representatives may attach business cards to these items but no personal contact information is to be gathered from caravan participants.
- (d) Publishers may not participate in any other events involving caravan participants during the caravan period.
- (e) Violations of caravan guidelines may result in a publisher being removed from the caravan.

Statutory/Other Authority: ORS 337.035
Statutes/Other Implemented: ORS 337.035
History:
ODE 3-2009, f. & cert. ef. 6-29-09



Strengthening and Expanding Instructional Materials: Removing Publisher Fees

Alexa Pearson (she/her), Sasha Grenier (she/her) and Vanessa Martinez (she/her)

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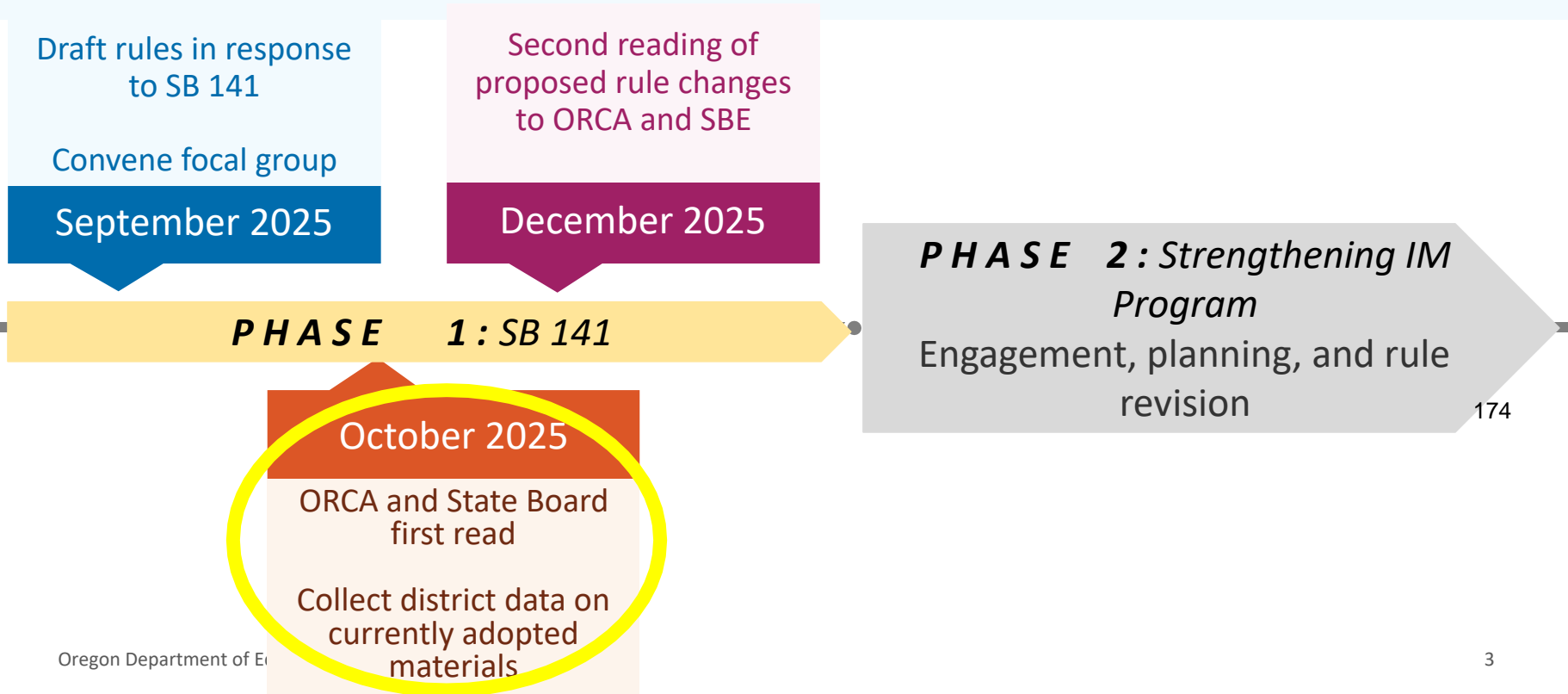
vanessa.martinez@ode.oregon.gov

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To ensure that every student, every day, is engaged in meaningful, affirming, grade-level instruction.

Strengthening and expanding instructional materials: a timeline



What are instructional materials?

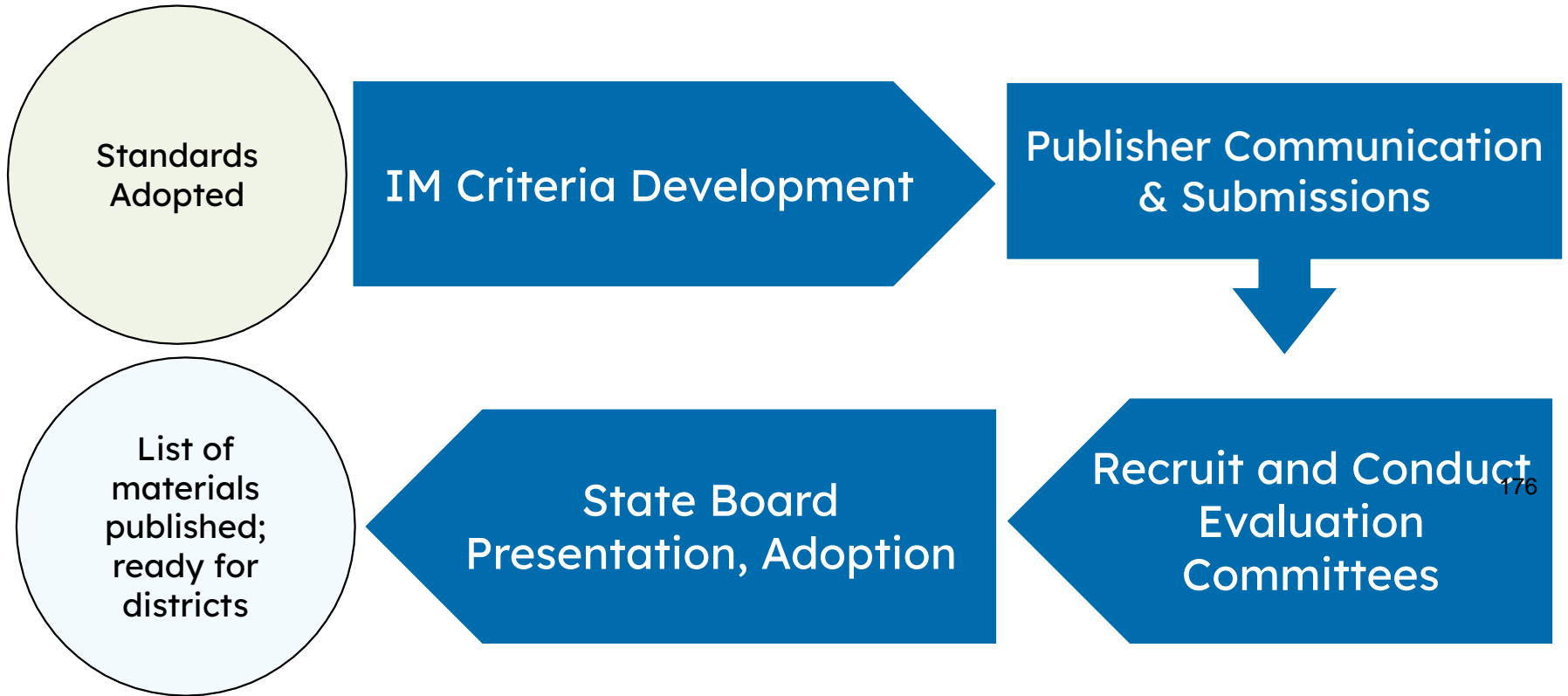


OAR [581-011-0050](#) Definition:

- (1) **“instructional material”** is any organized system, which constitutes the major instructional vehicle for a given course of study, or any part thereof.
- (2) ... **may include such instructional materials as** a hardbound or a softbound book or books, or sets or kits of print and non-print materials, including electronic and internet or web-based materials or media.

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ODE's Current Instructional Materials Program



What does this current process mean for...

ODE IM Program:

- Instability in fees collected each cycle has led to:
 - **Inconsistent budgeting**
 - **Insufficient funds** for the evaluation process
- Limits communication between publishers and ODE to maintain neutrality
 - **Prohibits ODE from seeking out publishers**

Publishers:

- Increased fees for comprehensive programs **with many titles**
- Can be cost-prohibitive
 - Less programs are submitted
 - **Often larger, established publishers** can “pay to play”

School Districts/Schools:

- Districts have **fewer options** to choose from
- Districts conduct **more independent adoptions**, which can be a financial burden and time-consuming
- Less time and resources to focus on implementation



SB 141

Section 27. ORS 337.065

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What does Section 27 of SB 141 do?

[Senate Bill 141](#) is a large bill around accountability in Oregon Education, and includes 36 different sections.

We are addressing only Section 27, which states:

school of any additional moneys under ORS 327.83

SECTION 27. ORS 337.065 is repealed.

REDUCTION OF

What does repealing ORS 337.065 mean?

337.065 Publisher fee; rules. (1) The Department of Education shall collect from each publisher or other supplier who submits a proposal under ORS 337.060 a fee equal to the retail price, or \$50, whichever is the greater, for each textbook title or item of instructional material proposed by the publisher or supplier for review and adoption by the State Board of Education. Fees are payable prior to consideration of the proposal.

337.065 Publisher fee; rules. (1) The Department of Education shall collect from each publisher or other supplier who submits a proposal under ORS 337.060 a fee equal to the retail price, or \$50, whichever is the greater, for each textbook title or item of instructional material proposed by the publisher or supplier for review and adoption by the State Board of Education. Fees are payable prior to consideration of the proposal.

(5) Pursuant to rules adopted by the State Board of Education, the Department of Education may waive the fee described in subsection (1) of this section for a textbook title or item of instructional material if the title or 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 repurposing by others of the title or item; and

(b) Submitted in the format that resides in the public domain or that has been released under an intellectual property license as described in paragraph (a) of this subsection. [1967 c.370 §§2,3; 1975 c.754 §9; 1991 c.886 §6; 2017 c.5 §1]

Proposed Rule Changes in Division 11

#1 OAR 581-011-0090, which defines and enforces the fee system, is repealed.

581-011-0090 Repeal

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.]

Language in other Division 11 OARs referring to fee system

Any language referring to fee system is removed - the rest of OAR stays the same

#2 OAR 581-011-0055 Revision

Guidelines for the Selection of Instructional Materials Criteria Committees

(6) Travel, lodging, and meal expenses for committee meetings are to be reimbursed in accordance with state policy. ***[From review fees collected by the Department of Education from publishers.]***

Language in other Division 11 OARs referring to fee system

Any language referring to fee system is removed - the rest of OAR stays the same

#3 [OAR 581-011-0087](#) Revision

Digital, Electronic, or Web-based Materials and Media

(4)[According to ORS 337.060 a publisher or other supplier who submits a proposal under 337.060 is required to pay a fee equal to the retail price expended by a school district during the length of the contract period, or \$50, whichever is greater, for each title or item of instructional material proposed by the publishers or supplier for review and adoption by the Board.] Bid proposals must include available retail price structures such as per-student, per-computer, subscription and other unit price structures and may include models where the cost is divided over multiple years and paid annually (as opposed to a single payment). **[Bid proposal fees are payable prior to consideration of the proposal.]** 183

Language in OARs referring to fee system

Any language referring to fee system is removed - the rest of OAR stays the same

#4 OAR 581-011-0114 Revision

Instructional Materials Caravan

(1) The Oregon Department of Education, in cooperation with ESDs and School Districts throughout the state, may conduct an Instructional Materials Caravan.

(a) Publishers or suppliers whose materials were adopted by the State Board of Education in the Subject Matter Cycle may participate in the Caravan.

(b) The Department may require publishers to pay a fee to participate in the caravan. ***[In addition to the bid submission fee charged for review according to ORS 337.065.]***

Why do these rule changes matter?

ODE IM Program:

- \$500,000 per biennium budget
- Opportunity to encourage publishers to submit
- Consistent funding to cover program
- Creates funding and timeframe to redesign IM Program

Publishers:

- Less cost-prohibitive
- Smaller publishers can more easily submit materials
- Publishers can submit the materials that constitute the best program, rather than the smallest fee

School Districts/Schools:

- More options available in state-adopted IM Lists
- Less need for Independent Adoptions, resulting¹⁸⁵ in less of a labor and financial burden

Engagement strategy

- Convened a focal group to review proposed language.
 - **Feedback affirmed language** in the draft rules are clear
 - Discussion and questions collected will **inform future instructional materials program strengthening.**
- Presented at Oregon Rules Advisory Committee (ORCA) on October 2nd
 - **Appreciative comments** for the clarity of the rules
 - Anticipation for **next phase** of program strengthening

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Equity impact

- **Smaller publishers** can more easily submit materials.
- Publishers can submit the materials that **constitute the best program, rather than the smallest fee.**
- Level the playing field between **large and small publishers, and open up options for OER programs.**
- **Wider range of quality adopted instructional materials** for school districts to choose from, may better meet the needs of their community and population.
- More instruction materials may result in **less need for districts to conduct independent adoptions,** which require additional staffing, funds, and time. ¹⁸⁷
- Can better equip educators who serve **multilingual learners and special education students with access to grade-level learning**
- With fewer district independent adoptions, **ESDs can offer opportunities to support coherent implementation** at a regional level

Fiscal impact

- ODE Instructional Materials program **no longer funded by publisher submission fees.**
- **More options** available in state-adopted Instructional Materials Lists
- Less need for Independent adoptions, resulting in **less of a labor and financial burden**
- **Less cost-prohibitive** submission process, including for OER materials
- Smaller publishers can **more easily submit materials**
- Publishers can submit the materials **that constitute the best program**, rather than the smallest fee

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Up next & discussion

We will continue to receive feedback from this Board and other partners. We will be back here in December for a second read.

Discussion questions:

- Do you have any questions or wonderings about the rule changes required by Section 27 of SB 141?
- Who else should we be reaching out to as we embark on the next phase of planning?

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Summary

Meeting Date: 10/16/2025

Title: Postponement of HQIM Adoption for World Languages and The Arts

Status: First Reading

Presentation: Yes

Key Staff: Vanessa Martinez, Deirdre Banning, Alexa Pearson

Topic Summary: ODE requests to postpone the evaluation and adoption of high-quality instructional materials (HQIM) for World Languages and The Arts due to lack of resources and as part of a larger adoption schedule strategy.

ODE Education Equity

Stance

Education equity is the equitable implementation of policy, practices, procedures, and legislation that translates into resource allocation, education rigor, and opportunities for historically and currently marginalized youth, students, and families including civil rights protected classes. This means the restructuring and dismantling of systems and institutions that create the dichotomy of beneficiaries and the oppressed and marginalized.

BACKGROUND AND NEED

Members of the State Board of Education are volunteers, with unique professional and lived experiences. Using plain language, this section should provide context for this item, including any needed overviews of relevant programs or initiatives.

- 1. Briefly, how does this topic, program, or initiative currently operate? Where is it located within Oregon’s school systems? How does it ultimately serve students?**

In accordance with OAR 581-011-0070, instructional materials are adopted by the State Board of Education on a 7-year subject matter cycle prior to October 31 each year. This results in a 7-year contract with publishers for the content area proposed for adoption (ORS 337.050, OAR 581-011-0070, and 0071). Following adoption by the Board, per Division 11, school districts have the responsibility to either (1) select and adopt from the list (ORS 337.050 and OAR 581-022-2355), (2) independently adopt instructional materials using the state criteria (OAR 581-022-2350), or (3) postpone adoption for up to two years (OAR 581-022-2360).

Under Oregon law, the State Board of Education has the authority to set the Instructional Materials Adoption Schedule and schedule for districts. Currently, instructional materials for World Languages and The Arts are expected to be evaluated and adopted by October 31, 2026.

Oregon State Board of Education Docket



2. **Please list the specific rule(s), statute(s), or recently passed legislation that allows the Board to take action on this item. Where are they prescriptive and where do they provide the Board and Department flexibility?**

Division 11 of Chapter 581 outlines the Board’s authority as well as ODE’s responsibilities regarding the HQIM program. The specific OARs that are relevant for this item are:

- OAR 581-011-0070, which sets an October 31 deadline for State Board adoptions, and a seven-year adoption period.
- OAR 581-011-0071, which outlines the State Board’s authority to adopt, and to set a content instructional materials schedule, and defines school districts rights and responsibilities in adopting instructional materials.

3. **Has this item come before the Board before? If so, when did the Board last take action, and what was that action?**

There is precedent for postponing the evaluation of instructional materials, as similar delays have occurred in previous adoption cycles to allow for stronger engagement, adequate funding, and more effective implementation support.

In January 2014, the State Board of Education postponed the mathematics instructional materials review from July 2014 to July 2015. The delay was intended to help districts avoid adopting CCSS-aligned ELA and Mathematics materials in consecutive years. It also provided ODE staff time to revise the adoption process, including the integration of the Instructional Materials Evaluation Toolkit (IMET), which was first used in the 2015 review.

In June 2018, the State Board of Education postponed the World Language instructional materials review from July 2019 to July 2020 to allow additional time for revising the World Language standards. This extension enabled ODE to establish a temporary contract with a World Language education specialist to lead the standards revision process prior to the materials review. The list of materials were adopted by the State Board in 2020 for Spanish, French, and Chinese. These materials hold a contract period of 2021-2028.

In January 2023, the State Board of Education postponed the Physical Education instructional materials review from July 2024 to October 2026. The delay provided ODE staff time to incorporate the updated SHAPE National Physical Education Standards, which were scheduled for revision in 2024.

The Arts content standards were last revised and adopted in 2007, and 2015. Current Arts standards are based on National Arts Standards. Instructional Materials for The Arts were last adopted by the State Board in 2005 and held in a contract period of 2006 – 2012. Instructional Materials Criteria was developed in 2004.

4. Why is this item coming before the Board now?

ODE is requesting the Board postpone the evaluation and adoption of high-quality instructional materials (HQIM) for World Languages and The Arts until at least Spring 2026. This will allow the ODE to conduct engagement and consider updates to this process in response to the implementation of [Section 27 of Senate Bill 141/House Bill 2009](#) (2025), the pending repeal of publisher fees, and ODE’s own efforts to strengthen and expand instructional materials.

There are a variety of reasons that this is coming before the Board, including:

Limited Staffing and Funding Resources

- ODE does not have funding or position authority for World Languages or the Arts specialists, and recent Policy Option Packages (most recently in 2023) have not resulted in additional funding for positions. Without these positions, ODE does not employ the staff necessary to facilitate these processes.
- To remain aligned with the current adopted schedule and meet the yearlong deadlines specified in administrative rule, ODE would need to present the Instructional Materials Criteria for World Languages and The Arts to the State Board of Education in January 2026. This timeline requires ODE to begin work on the updated criteria in October or November 2025. Due to current staffing limitations and lack of funding to contract external support, ODE is not on track to meet this initial deadline. Missing this first milestone would result in a cascading delay, ultimately impacting the ability to present the recommended list of adopted materials to the State Board of Education by October 31, 2026.
- The content standards for both World Languages and The Arts have not been revised. Historically, standards are updated prior to initiating the instructional materials review process. However, due to limited staffing capacity, this revision did not occur during the 2024–25 school year. As a result, the upcoming instructional materials review will need to proceed using unrevised standards.
- ODE currently lacks the financial resources to contract with an external partner to lead the standards review or instructional materials review process for either World Languages or The Arts. This does not appear to be a viable option in the upcoming biennium.

2026 Comprehensive Engagement to Improve and Sustain ODE’s Instructional Materials Adoption Schedule

- Each year, a new list of approved high-quality instructional materials (HQIM) for a specific content area is approved by the State Board of Education. Districts are required to evaluate and select an HQIM for this content area within one to three years of the State Board Adopted list being published. The subsequent year, districts must select HQIM for the next content area. The current HQIM schedule includes ten required content areas in seven years; after the seventh year, the schedule starts over, and

districts are required to select new HQIM for each content area. The current approved 7-year adoption schedule for content areas ends in Fall of 2026. The State Board will need to review and approve a new schedule in 2026.

- Reviewing and revising the HQIM adoption schedule is part of a larger strategy to improve the HQIM program in Oregon. Selecting materials is just the first step in a series of district actions. After selection, districts need to move into the work of implementation, which includes professional learning on the specific HQIM so that educators are prepared to use the resources well. ODE has received feedback that by requiring districts to select materials for a new content area each year, the time to implement these materials well is undermined, especially at the elementary level. In addition, many districts have communicated their struggle to keep up with the selection schedule, often due to staffing and funding challenges. This can lead to districts falling behind in their required adoption schedule, and it can lead to a cumulative effect, requiring districts to select multiple HQIM in the same year compounding the challenge with effective implementation.
- With the passage of SB 141, ODE will be conducting a comprehensive review of Division 11, which is scheduled to be presented to the Board in June 2026. As part of this process, ODE intends to do deep engagement about how the current instructional materials adoption schedule is working for districts, K-12 educators, and how the adoption schedule can prioritize and support the skillful implementation of high-quality instructional materials. ODE is interested in hearing from districts and partners about spacing between adoptions per content area and how to balance well-rounded (all content areas) and instructional materials implementation. Following this engagement, ODE will come to the Board in the Spring of 2026 with a revised Instructional Material Program and adoption schedule.

5. Who requested or brought about the need for this item? (Select all that apply.)

- ODE Staff
- Students
- Families
- Community-Based Organizations
- Culturally Specific Organizations
- School Districts
- Education Service Districts
- Charter Schools
- Oregon State Legislature
- Educational Associations
- Racial Justice Council
- Federal Government
- One or more of Oregon’s nine federally recognized tribes: _____
- Other: _____

ENGAGEMENT STRATEGY AND LEARNINGS

The State Board of Education expects all items that come before it be reviewed and influenced, to the greatest extent possible, by a robust community engagement process. Using plain language, this section should provide an overview of the role that engagement played in this item, including with Oregon’s nine federally recognized Tribes, other state agencies, and external partners.

6. How did the [Equity Decision Tree](#) inform your office/team engagement strategy? Who is most likely to be affected and how have they been intentionally incorporated into the engagement process for this item?

A range of partners and members of the public stand to be affected by this postponement, including ESDs, Oregon School Districts, K-12 educators, students, and internal operations (especially Division 22 assurances). K-12 educators in visual arts, music, theatre, dance, media arts, and world language instruction stand to be the most impacted.

There are several existing requirements to ensure that students will continue to receive high-quality instruction in both World Languages and The Arts. [ORS 329.025](#) requires school districts to provide “Rigorous academic content standards and instruction in [...] The Arts and world languages.” Current Oregon Diploma requirements (described in [OAR 581-022-2000](#) and [ORS 329.451](#)) include at least three combined credits (of 24) in World Languages, The Arts, and Career and Technical Education to graduate. Notably, The Arts have been a primary focus area for schools and districts developing Career and Technical Education programming. Additionally ODE five years ago, ODE received a federal grant which included an Arts Education Specialist position. With this grant, supports were developed for the field, including the [Arts Access Toolkit](#) and Arts Education newsletter. Funding for this limited duration position ended on September 30, 2025.

As part of the next phase in engagement in the Winter of 2025 and early Spring of 2026, ODE will include World Languages and The Arts educators and content specialists in the engagement process, to ensure that future Instructional Materials Program schedules and design actively reflect the impacted educators, leaders, and partners. Additionally, ODE will require ongoing consultation with a range of specialists and educators in the content areas to inform any standards or instructional materials updates that occur.

7. After consulting with ODE’s Rules Coordinator and the Office of Indian Education, did this item require Tribal Consultation and/or Tribal Communication with Oregon’s nine federally recognized tribes? (For more information, please reference ODE’s [Tribal Consultation Toolkit](#).)
- No
 - Yes – Both Consultation and Communication.
 - Yes – Only Communication.

Oregon State Board of Education Docket



8. Has your office/team considered how this item intersects with the authority of other state entities that serve the health and education needs of Oregon’s students, or otherwise contribute to the climate of Oregon’s school systems? If so, please select from the below list.

- N/A; this item does not intersect with other state entities.
- Oregon Health Authority (OHA)
- Department of Early Learning and Care (DELIC; formerly ELD)
- Educator Advancement Council (EAC)
- Higher Education Coordinating Commission (HECC)
- Youth Development Oregon (YDO)
- Teacher Standards and Practices Commission (TSPC)
- Oregon Housing and Community Services (OHCS)
- Other: _____

If you selected any of the above entities, please share why they were involved, how the Department partnered with them, and what feedback they provided.

Please enter your answer here

9. Which geographic perspectives are intentionally represented in your office/team engagement strategy?

- Northeast Oregon
- Central and Southeast Oregon
- Southwest Oregon
- Willamette Valley and Central Coast
- Northwest Oregon
- Tribal lands
- Other: _____

Why did your office/team focus on the above geographical perspective(s)?

At this time, ODE has initiated engagement with Oregon organizations and partners—including OAESD, ESDs, COSA, TSPC, EAC, and RENS—regarding the instructional materials adoption schedule. Additionally, ODE has joined the Instructional Materials Professional Development (IMPD) Network, a national coalition committed to advancing access to high-quality, standards-aligned instructional materials and supporting educators in using them effectively.

Building on these initial efforts, ODE will undertake a broader engagement process during the winter, and spring of 2026 focused on improving and sustaining the Instructional Materials Program and a new adoption schedule. This engagement will include collaboration with TSPC, educator preparation programs, OAESD, ESDs, school districts, administrators, educators, students, and the public.

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- 10. Please highlight some of the key pieces of feedback your office/team received during the engagement process. How did this feedback influence the development of this item? How were differences in opinion accounted for?**

While no formal external feedback has been presented at this time, informal and ongoing input from school districts and ESDs has largely indicated that districts are unable to maintain the existing adoption schedule due to funding constraints and limited capacity to focus on implementation. The challenge is compounded by the requirement to adopt three content areas in a single year: Physical Education, World Languages, and The Arts, placing significant strain on district resources and planning.

- 11. Please describe any additional engagement opportunities your office/team will be pursuing prior to asking the Board to take action on this item.**

ODE will undertake a broader engagement process during the winter, and spring of 2026 focused on improving and sustaining the Instructional Materials Program and a potential new adoption schedule/approach. This engagement will include collaboration with TSPC, educator preparation programs, OAESD, ESDs, school districts, administrators, educators, students, and the public.

Additionally, ODE will intentionally involve World Languages and Arts educators and content specialists to ensure that future IM Program is informed by the experiences and needs of the educators, leaders, and partners they impact.

FISCAL AND ADMINISTRATIVE IMPACT ANALYSIS

Equitable resource allocation is a critical component of education equity. Using plain language, this section should describe the fiscal, administrative, and small business impacts of this item, and how it affects the larger social system that serves Oregon's students.

- 12. After consulting with ODE's Rules Coordinator and Grant Consolidation Team, was this item identified as a grant-related item?**

No

Yes; please review Appendix B: Grant Consolidation below.

- 13. Will Board action create fiscal or administrative impacts on districts, ESDs, community-based organizations, and/or the nine federally recognized tribes? If so, please describe the anticipated short- and long-term effects and how they may be felt differently in small, rural, or remote communities.**

The action of postponing will not create fiscal or administrative impacts on ESDs and districts, as they will only be required to purchase, adopt, and implement Physical Education materials by Fall of 2027. Budgets will be a key consideration during engagement to ensure that districts

have the necessary resources to effectively implement the adopted materials without undue financial strain.

14. Will Board action create a fiscal or administrative impact on state agencies, units of local government, and/or the public? Will it increase costs associated with compliance for small businesses?

ODE does not anticipate increased costs for small businesses. If there is no postponement, there will likely be fiscal and administrative impacts to the Instructional Materials team on the Standards and Instructional Support team in the Office of Teaching Learning and Assessment, and to Division 22 compliance work.

Evaluating instructional materials for World Languages and The Arts is considerably more costly and complex than for other content areas, due to the diversity of languages and the breadth of arts disciplines, including music, theatre, and visual arts. Moreover, adoptions in these areas typically require convening multiple evaluation panels, each involving educators with specialized linguistic or discipline-specific expertise.

EQUITY IMPACT ANALYSIS

The State Board of Education envisions an aspirational education system that honors its increasingly diverse student body and affirms every student to reach their full potential in a rapidly shifting global environment. Using plain language, this section should describe the impact of this item on students and the larger social system that serves their health and education needs.

15. How will Board action on this item ultimately impact students and their families, particularly those who have been and continue to be systemically marginalized?

This will result in a delay in the adoption and implementation of new instructional materials at both the district and classroom levels. However, a rushed or under-resourced adoption process could have long-lasting negative effects on students, as it would place limited or low-quality instructional materials on the state-adopted list, impacting Oregon students for more than seven years.

Additionally, because this postponement will directly impact the supports that Arts and World Languages educators receive from the state, it may also affect the standards-aligned classroom instruction and materials that students receive.

This postponement allows districts to focus on high-quality implementation that directly benefits students who are often most impacted by under-resourced or rushed instructional transitions. This postponement would enable districts to allocate resources—such as time, personnel, and funding—toward the effective implementation of instructional materials in

other content areas and reduce the administrative burden of managing two additional adoption processes during a period of significant need and limited capacity.

16. How will Board action on this item ultimately impact school district employees and volunteers, particularly those who have been and continue to be systemically marginalized?

This action may result in local district delayed adoption and implementation for World Languages and The Arts materials adoption. K-12 World Languages and Arts educators have historically been impacted by delayed standards and instructional materials adoptions and will continue to be impacted with this decision. Notably, the Arts standards were last revised in 2015, and the most recently adopted Arts Instructional Materials were adopted in October 2005.

17. What are the anticipated short- and long-term consequences of Board action on this item? Will Board action have a cumulative effect on students, families, educators, districts, or Oregon’s school systems?

The decisions made in the Instructional Materials Program have widespread and long-term consequences for students, educators, districts, and Oregon’s school systems. A postponement will provide sufficient time to engage with affected groups and allow for more intentional planning that ensures sustainable and effective implementation.

By continuing to postpone the State Board adoption of instructional materials for these two content areas, local decisions to adopt The Arts and World Languages materials may be deprioritized.

18. What are the anticipated short- and long-term consequences of inaction on this item and who would experience those consequences?

Delayed communication on the instructional materials page, to school districts, ESDs, educators, and publishers.

RECOMMENDED ACTION

The State Board of Education has dedicated itself to challenging the status quo and sharing responsibility for every student’s academic and lifelong success. Using plain language, this section should describe the choice before the Board, the Department’s recommendation, and any other relevant information.

19. Please provide a brief summary of the specific language your office/team is bringing to the Board. Are there any key decisions within this language that your office/team would like the Board to make?

ODE is proposing to postpone the Instructional Materials process for World Languages and The Arts until the spring of 2026, when ODE will return with further information from engagement about the Instructional Materials adoption schedule.

20. How is this language responsive to identified needs and/or feedback received through the engagement process? How is it in alignment with [the Board’s Mission, Vision, and Values](#)?

ODE’s recommended action is meant to recognize the inequitable impacts of the existing instructional materials program and adoption schedule and to set the intention of actively engaging school districts, educators, and content specialists in the engagement sessions, focal groups, and programmatic planning. It is ODE’s intent to design the upcoming IM program and schedule (brought to the Board in Spring 2026) based on direct and widespread feedback collected in the winter and spring.

21. Please describe the action your office/team is recommending to the Board (for example, the adoption of rules or the approval of a waiver) and how it reflects the Department’s commitment to academic excellence, belonging and wellness, and reimagining accountability.

ODE is committed to a vision of academic excellence, belonging, and wellness, and to reimagining accountability. The vision for teaching and learning is to ensure that every student, every day, is engaged in meaningful, affirming, grade-level instruction. In order to realize this vision, ODE is interested in prioritizing a deliberate and well-supported approach to the implementation of instructional materials, ensuring that educators are supported to use them skillfully and effectively to maximize student learning.

As an extension of SB 141, Section 27, ODE will return to the Board with a proposal for an improved and sustainable instructional materials program, and a new materials adoption schedule. This proposal will be developed with deep engagement with all content areas currently listed, in the existing adoption schedule (including both World Languages and The Arts).

22. Please note any additional support the Department is (or will be) providing to ensure successful implementation of this item.

- N/A; this item does not require any additional support.
- Communications plan
- Technical assistance, professional development, and/or coaching
- Direct or differentiated support for small, rural, or remote school districts
- Corrective Action Processes
- Safety measures
- Organizational culture or practice changes (change management)
- Materials and/or supplies
- Guidance and/or supplemental resources
- Other: We are doing engagement to revise our approach to the adoption schedule

23. Has this item changed since the last Board meeting?

Oregon State Board of Education Docket



- N/A; this item has not previously been before the Board
- No; same as last month
- Yes; please review Appendix A: Second Reading below.



Request to Postpone Instructional Materials Adoption for World Languages & The Arts

State Board of Education, October 16, 2025

Alexa Pearson, Assistant Superintendent Office of Teaching, Learning, and Assessment

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Vanessa Martinez, Director Standards & Instructional Support

Deirdre Banning, Instructional Materials Coordinator

Purpose



ODE is requesting the Board revise the current instructional materials adoption schedule ([OAR 581-011-0070](#)) to postpone the evaluation and adoption of instructional materials for World Languages and The Arts.

World Languages & The Arts Requirements



- [ORS 329.025](#) requires school districts to provide “Rigorous academic content standards and instruction in [...] the arts and world languages.”
- Oregon Diploma requirements (described in [OAR 581-022-2000](#) and [ORS 329.451](#)) include at least three combined credits (of 24) in World Languages, the Arts, and Career and Technical Education to graduate.

Our Time Today



1. Current Instructional Materials Adoption schedule
2. Postponement for World Languages and The Arts
3. Upcoming SB 141 Engagement
4. Instructional Leadership Capacity

Authority



Division 11 of Chapter 581 outlines the Board's authority, and ODE's responsibilities regarding Instructional Materials program.

The OARs that are relevant for this item are:

1. [OAR 581-011-0070](#): Sets an October 31 deadline for State Board adoptions, and a seven-year adoption period.
2. [OAR 581-011-0071](#): Outlines the State Board's authority to adopt, and to set a content instructional materials cycle, and defines school districts rights and responsibilities in adopting instructional materials.

The schedule and contract periods may be amended at the discretion of the State Board.

Precedent for Postponement of Instructional Materials

- **January 2014:** Postponed the Mathematics instructional materials review from July 2014 to July 2015.
 - *To help districts avoid adopting CCSS-aligned ELA and Mathematics materials in consecutive years.*
- **June 2018:** Postponed the World Language instructional materials review from July 2019 to July 2020
 - *To allow additional time for revising the World Language standards.*
- **January 2023:** Postponed the Physical Education instructional materials review from July 2024 to October 2026.
 - *To incorporate the updated SHAPE National Physical Education Standards, scheduled for revision in 2024.*

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Instructional Materials Adoption Schedule

- Oregon currently reviews and adopts **9 subjects on a 7-year cycle**.
- Districts are required to adopt Instructional Materials **annually** to remain compliant with Division 22 standards.
- Implementation can take four or more years, leading to a compounding effect.

Subject Area	Adoption Year
English Language Arts English Language Proficiency	2021
Math	2022
Science	2023
Health	2024
Social Sciences	2025
PE World Languages The Arts	2026

Ongoing Feedback

Annual adoptions
place pressure on
K–5 educators

Balancing selection
and implementation
across content areas

Staffing and
funding
constraints

Time between
adopting new
standards and²⁰⁸
selecting new
materials is too short

World Languages & The Arts Background

WL Standards: Adopted 2019

Temporary contract with WL Education Specialist to lead revision

WL Instructional Materials: Last reviewed in 2020.

- Postponed from July 2019 to revise standards first
- Spanish, French, Chinese
- Contract period February 1, 2021- February 1, 2028



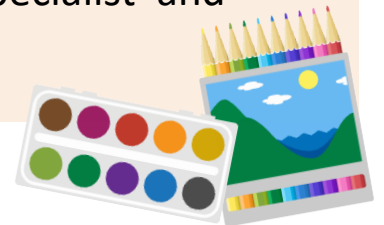
Arts Standards: Adopted 2015

Based on 2014 National Arts Standards (revision in 2026)

Arts Instructional Materials: Last Reviewed in 2005.

- Contract period 2006-2012
- The Arts were removed from the previous instructional materials cycle²⁰⁰⁹

Well Rounded Access Program Grant: 5-year federal grant- Arts specialist and resources (ended 9/30/2025)



Limited Staffing and Funding Resources

Dedicated ODE Staff with Subject Matter Expertise	Subject Area	Adoption Year
Yes	English Language Arts	2021
Yes	English Language Proficiency	2021
Yes	Math	2022
Yes	Science	2023
Yes	Health	2024
Yes	Social Sciences	2025 ²¹⁰
Yes	PE	2026
No	World Languages	2026
No	The Arts	2026

Strengthening and Sustaining the Instructional Materials Program Timeline

Draft rules in response to SB 141 and convene engagement group

September 2025

Second reading of proposed rule changes to ORCA and SBE

December 2025

PHASE 1: SB 141

October 2025

ORCA and State Board first read

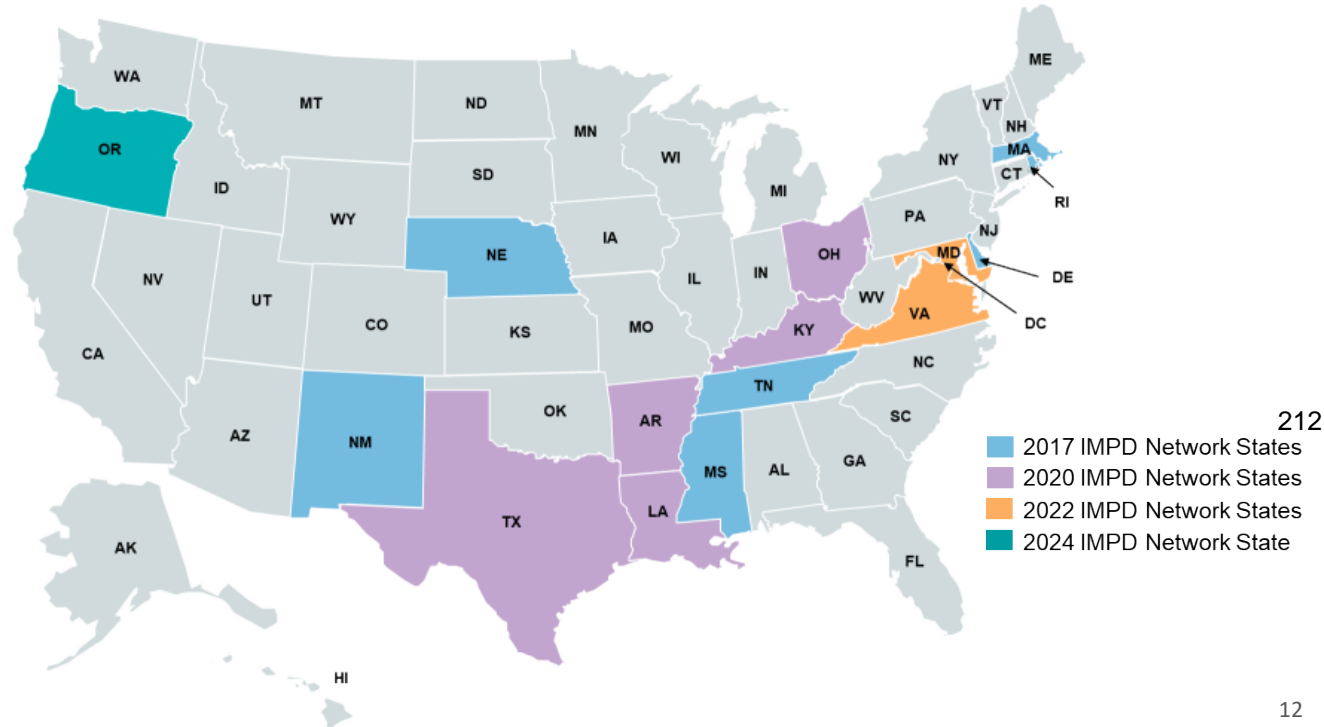
Collect district data on currently adopted materials

PHASE 2: Strengthening IM Program
Engagement, planning, and rule revision

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Oregon & the Instructional Materials Professional Development Network (IMPD)

Helps Oregon learn from other states about how to build from a focus on selection to full support of High-quality instructional materials as an instructional strategy.



Next Steps



- Approval of the Postponement
- Engagement
- Rule-Writing for Division 11
- Re-design Instructional Materials Program
- Return to the State Board of Education in spring 2026

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Questions & Comments

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Vanessa.Martinez@ode.oregon.gov

Deirdre.Banning-Shaughnessy@ode.oregon.gov

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Interim Test Selection Process

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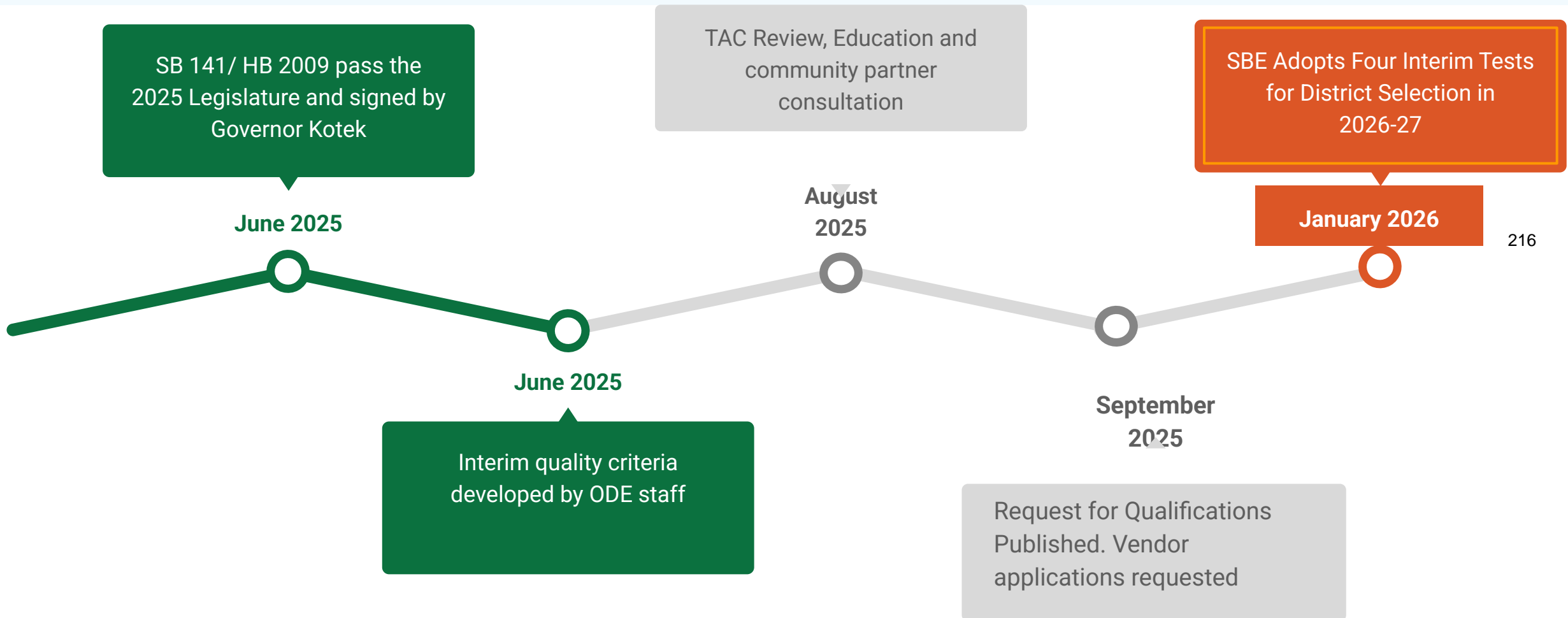
Oregon State Board of Education

October 16, 2025

Dr. Andrea V. Lockard (she/her) & Dan Farley (he/him)

Office of Research, Assessment, Data, Accountability, & Reporting (RADAR)

Timeline



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Consultation & Refinement

- June 12, 2025 - Region One Advisory Committee
- August 4, 2025 - Malheur Executive Summit
- August 5, 2025 - COSA Summer Conference
- August 10, 2025 - Oregon School Boards Association Hot Topic Roundtable
- August 12-13, 2025 - Oregon Technical Advisory Committee
- August 18 - 22, 2025 - District/ESD Administrator Review
- August 25, 2025 - Coalition of School Administrators
- September - January 2026 - ORCA & SBE Engagement
- January 31, 2026 - Final SBE Decision Due

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Oregon Buys Request for Qualifications

- Oregon Buys RFQ Bid Solicitation ([S-58100-00014955](#))
- RFQ Published on September 19, 2025
- Questions received from vendors by October 3, 2025
- Proposals due to ODE by October 20, 2025 at 4:00 PM Pacific

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Minimum to Justify Review

- Adherence to all student privacy statutes and rules (e.g. FERPA and PPRA) and data security requirements (e.g. SSAE 18 or SOC 2).
- Adherence to sufficient cybersecurity frameworks (e.g. NIST Cybersecurity Framework Version 1.1, NIST SP 800-53, Information security management systems (ISO 27000 series), Cybersecurity Maturity Model Certification (CMMC, ~FAR/DFAR), etc.).
- Certification that all Interim Assessments can be delivered online.
- Certification that all data can be exported securely to districts in CSV and PDF formats.

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Review Process

Phase 1 - Technical Quality (accessibility, reliability, & validity)

- ODE psychometricians
- TAC members

Phase 2 - Oregon-Specific Requirements

- ODE Staff
- District/ESD Administrators
- Community Partners

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Examples of Criteria

Phase 1 - Technical

Alignment evidence

Reliable for benchmarking

Measure growth/progress

Valid for intended uses and interpretations

Accessibility

Phase 2 - Oregon-Specific

Fiscal impact

Spanish language versions

Paper version for Fall of K

Interoperability requirements

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Proposed Rule

OAR 581-XXX-XXXX

Interim Assessments

(1) School districts and public charter schools shall administer interim assessments in accordance with ORS 329.485.

(2) In administering interim assessments under this rule, school districts and public charter schools shall select interim assessments from among the list of interim assessments adopted by the State Board of Education most recently before the most recent effective date of this rule [See ED. NOTE.]. 222

(3) The Oregon Department of Education will engage with education and community partners to develop guidance for interim test administration windows and reporting requirements for the purposes of implementing ORS 329.485(5).

[ED. NOTE: The list of interim assessments referenced is available from the Oregon Department of Education upon request.]

Statutory/Other Authority: ORS 329.485

Statutes/Other Implemented: ORS 329.485

Equity Impact

- If implemented as intended, the interim test requirement should make student learning visible more frequently throughout the school year
- Interim tests have been administered for decades in Oregon, but have not been part of public accountability conversations
- Assessment literacy is likely to evolve as education and community partners endeavor to compare different interim assessments and associate results with state summative tests

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SBE Engagement

- What are you curious and/or excited about?
- What questions do you have about the selection process?
- What questions do you have about the criteria?
- What impacts of this decision can ODE help districts prepare for, and how?
- Other?

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Summary

Meeting Date: 10/16/2025

Title: Interim Test Selection Process

Status: First Reading

Presentation: Yes

Key Staff: Dan Farley, Andrea Lockard

Topic Summary: The Oregon Department of Education is proposing rules for implementation of the Oregon Education Accountability Act related to the selection of interim tests and subsequent administration and reporting, pursuant to the requirements in ORS 329.485.

ODE Education Equity

Stance

Education equity is the equitable implementation of policy, practices, procedures, and legislation that translates into resource allocation, education rigor, and opportunities for historically and currently marginalized youth, students, and families including civil rights protected classes. This means the restructuring and dismantling of systems and institutions that create the dichotomy of beneficiaries and the oppressed and marginalized.

BACKGROUND AND NEED

Members of the State Board of Education are volunteers, with unique professional and lived experiences. Using plain language, this section should provide context for this item, including any needed overviews of relevant programs or initiatives.

- 1. Briefly, how does this topic, program, or initiative currently operate? Where is it located within Oregon’s school systems? How does it ultimately serve students?**

The Oregon Education Accountability Act (Senate Bill 141) requires the State Board of Education to adopt four interim assessments in language arts and mathematics in Grades K-8 that will be administered and reported to school boards and education administrators three times per year during public meetings. The Oregon Department of Education developed technical and Oregon-specific criteria for review of prospective interim test vendor products and published a Request for Qualifications on September 19, 2025. Responses are due from vendors by October 20, 2025 at 4:00 PM Pacific Time.

- 2. Please list the specific rule(s), statute(s), or recently passed legislation that allows the Board to take action on this item. Where are they prescriptive and where do they provide the Board and Department flexibility?**

The Oregon Education Accountability Act ([Senate Bill 141; Section 24](#)) was signed into law during the 2025 long session and is housed within ORS 329.485. The bill requires the Oregon

Oregon State Board of Education Docket



State Board of Education to adopt no more than four approved interim assessments for district selection. Districts must implement interim assessments beginning in the 2026-27 school year.

3. Has this item come before the Board before? If so, when did the Board last take action, and what was that action?

This is a new bill; this topic has not come before the Board before.

4. Why is this item coming before the Board now?

The Oregon Education Accountability Act requires that the Board adopt the approved list of no more than four interim tests by January 31, 2026. In order to meaningfully involve the Oregon Rules Committee Advisory and the Board, and meet that timeline, the presentation had to begin with the October Board meeting.

5. Who requested or brought about the need for this item? (Select all that apply.)

- ODE Staff
- Students
- Families
- Community-Based Organizations
- Culturally Specific Organizations
- School Districts
- Education Service Districts
- Charter Schools
- Oregon State Legislature
- Educational Associations
- Racial Justice Council
- Federal Government
- One or more of Oregon’s nine federally recognized tribes: _____
- Other: _____

ENGAGEMENT STRATEGY AND LEARNINGS

The State Board of Education expects all items that come before it be reviewed and influenced, to the greatest extent possible, by a robust community engagement process. Using plain language, this section should provide an overview of the role that engagement played in this item, including with Oregon’s nine federally recognized Tribes, other state agencies, and external partners.

6. How did the [Equity Decision Tree](#) inform your office/team engagement strategy? Who is most likely to be affected and how have they been intentionally incorporated into the engagement process for this item?

Oregon State Board of Education Docket

The engagement process for interim selection intentionally engaged measurement experts and those who will be impacted by the bill, including education administrators and policy advocates. The engagement process in the development of the criteria used to select the interim tests could not be broad, given the competitive nature of the RFQ procurement process. Engagement with a broader community is recommended for considerations related to implementation after the interim selection process is completed.

7. **After consulting with ODE’s Rules Coordinator and the Office of Indian Education, did this item require Tribal Consultation and/or Tribal Communication with Oregon’s nine federally recognized tribes? (For more information, please reference ODE’s [Tribal Consultation Toolkit](#).)**
- No
 - Yes – Both Consultation and Communication.
 - Yes – Only Communication.
8. **Has your office/team considered how this item intersects with the authority of other state entities that serve the health and education needs of Oregon’s students, or otherwise contribute to the climate of Oregon’s school systems? If so, please select from the below list.**
- N/A; this item does not intersect with other state entities.
 - Oregon Health Authority (OHA)
 - Department of Early Learning and Care (DELIC; formerly ELD)
 - Educator Advancement Council (EAC)
 - Higher Education Coordinating Commission (HECC)
 - Youth Development Oregon (YDO)
 - Teacher Standards and Practices Commission (TSPC)
 - Oregon Housing and Community Services (OHCS)
 - Other: _____

If you selected any of the above entities, please share why they were involved, how the Department partnered with them, and what feedback they provided.

N/A

9. **Which geographic perspectives are intentionally represented in your office/team engagement strategy?**
- Northeast Oregon
 - Central and Southeast Oregon
 - Southwest Oregon
 - Willamette Valley and Central Coast
 - Northwest Oregon
 - Tribal lands
 - Other: Statewide perspectives were solicited

Why did your office/team focus on the above geographical perspective(s)?

Urban, rural, and regional perspectives were represented in the intentionally small sample of education and community partners who were engaged to this point. Measurement experts from Oregon’s assessment and accountability Technical Advisory Committee were consulted, as were ODE staff who are measurement experts.

10. Please highlight some of the key pieces of feedback your office/team received during the engagement process. How did this feedback influence the development of this item? How were differences in opinion accounted for?

ODE responded to feedback regarding the complexity of the technical criteria by synthesizing and reducing the complexity of those criteria. The Oregon-Specific criteria were developed in partnership with Oregon administrators and reflect the values of those administrators as well as of the department.

11. Please describe any additional engagement opportunities your office/team will be pursuing prior to asking the Board to take action on this item.

The department will continue to engage with ORCA and address public comments. The technical review of proposed vendor products will be conducted with ODE measurement experts and members of Oregon’s assessment and accountability Technical Advisory Committee at the end of October and the first week of November. The Oregon-Specific criteria review of interim tests that are advanced pursuant to the technical review will be conducted with ODE staff and education and community partners the week of November 17-21, 2025. Engagement with education and community partners will be conducted in the winter and early spring of 2026, addressing interim test administration windows and reporting requirements.

FISCAL AND ADMINISTRATIVE IMPACT ANALYSIS

Equitable resource allocation is a critical component of education equity. Using plain language, this section should describe the fiscal, administrative, and small business impacts of this item, and how it affects the larger social system that serves Oregon’s students.

12. After consulting with ODE’s Rules Coordinator and Grant Consolidation Team, was this item identified as a grant-related item?

No

Yes; please review Appendix B: Grant Consolidation below.

13. Will Board action create fiscal or administrative impacts on districts, ESDs, community-based organizations, and/or the nine federally recognized tribes? If so, please describe the anticipated short- and long-term effects and how they may be felt differently in small, rural, or remote communities.

Yes. Many districts in Oregon administer interim assessments in these grade levels in language arts and mathematics. If the assessments they are using are ultimately adopted as approved by the Board, there will be no additional expense. If, however, the tools they are using are not on the approved list, districts will need to determine whether they should transition to an approved interim assessment entirely or maintain both their current tools and the new interim assessment. There are vendor and staff professional development costs associated with both options that are challenging to predict. There are also districts who do not have interim assessments in place, for whom vendor and staff professional development costs would be added. The RFQ includes a current usage and cost component that should allow ODE to make reasonable projections regarding these costs for consideration during the Second Reading planned in December.

14. Will Board action create a fiscal or administrative impact on state agencies, units of local government, and/or the public? Will it increase costs associated with compliance for small businesses?

The Assessment & Student Reporting Team in the Office of Research, Assessment, Data, Accountability, and Reporting (RADAR) is impacted by this decision administratively, as the team and RADAR leadership have been charged with designing and conducting the RFQ process. The team will also need to engage with education and community partners to establish interim test administration windows and reporting requirements. No additional staffing nor funding has been made available to the department to meet these requirements.

EQUITY IMPACT ANALYSIS

The State Board of Education envisions an aspirational education system that honors its increasingly diverse student body and affirms every student to reach their full potential in a rapidly shifting global environment. Using plain language, this section should describe the impact of this item on students and the larger social system that serves their health and education needs.

15. How will Board action on this item ultimately impact students and their families, particularly those who have been and continue to be systemically marginalized?

If implemented well, interim tests can be used to identify areas of strength to build from and areas where growth is needed periodically across the school year. This can allow for meaningful responses to student learning needs during the school year. These interim test results will also be shared publicly, which is common practice in some districts but will be new for others. Public reporting will shine a light on how schools and districts are serving students during the school year, which can be compared to student performance on end-of-year state summative test results.

16. How will Board action on this item ultimately impact school district employees and volunteers, particularly those who have been and continue to be systemically marginalized?

The impact on school district employees will vary depending upon their current interim assessment use. The meaningful benefit for most of Oregon’s students will come in the form of the public reporting requirement. Families and students who are served by Oregon’s districts will have three additional data points to consider (fall/winter/spring) in considering how well students in their child’s school and district are being served.

17. What are the anticipated short- and long-term consequences of Board action on this item? Will Board action have a cumulative effect on students, families, educators, districts, or Oregon’s school systems?

If implemented as intended, interim tests can be positioned to guide student learning decisions periodically across the school year at key points. The best tools provide educators with information about how well students learned content that they were just taught, and also point to instructional resources that can help students make their next learning move. The short-term consequence is increased awareness and public transparency about student achievement and change across the school year. In the long-term, if implemented as intended, Oregon students should demonstrate proficiency on Oregon’s state summative tests at increased levels. These increases will reflect that students are college and career ready.

18. What are the anticipated short- and long-term consequences of inaction on this item and who would experience those consequences?

District assessment practices would continue as they are currently situated. There would be no requirement to administer or publicly report interim assessments.

RECOMMENDED ACTION

The State Board of Education has dedicated itself to challenging the status quo and sharing responsibility for every student’s academic and lifelong success. Using plain language, this section should describe the choice before the Board, the Department’s recommendation, and any other relevant information.

19. Please provide a brief summary of the specific language your office/team is bringing to the Board. Are there any key decisions within this language that your office/team would like the Board to make?

OAR 581-XXX-XXXX

Interim Assessments

(1) School districts and public charter schools shall administer interim assessments in accordance with ORS 329.485.

(2) In administering interim assessments under this rule, school districts and public charter schools shall select interim assessments from among the list of interim assessments adopted by the State Board of Education most recently before the most recent effective date of this rule [See ED. NOTE.].

Oregon State Board of Education Docket



(3) The Oregon Department of Education will engage with education and community partners to develop guidance for interim test administration windows, reporting requirements, and the timeline for an adoption renewal cycle for the purposes of implementing ORS 329.485(5). [ED. NOTE: The list of interim assessments referenced is available from the Oregon Department of Education upon request.]

Statutory/Other Authority: ORS 329.485

Statutes/Other Implemented: ORS 329.485

20. How is this language responsive to identified needs and/or feedback received through the engagement process? How is it in alignment with [the Board's Mission, Vision, and Values](#)?

The proposed language reflects the requirements in the Oregon Education Accountability Act, as well as initial feedback that the department received from ORCA.

21. Please describe the action your office/team is recommending to the Board (for example, the adoption of rules or the approval of a waiver) and how it reflects the Department's commitment to academic excellence, belonging and wellness, and reimagining accountability.

We recommend the State Board consider the proposed rule and provide the department with information regarding any needed edits or clarifications. The department will present a Second Reading at the December Board meeting.

22. Please note any additional support the Department is (or will be) providing to ensure successful implementation of this item.

- N/A; this item does not require any additional support.
- Communications plan
- Technical assistance, professional development, and/or coaching
- Direct or differentiated support for small, rural, or remote school districts
- Corrective Action Processes
- Safety measures
- Organizational culture or practice changes (change management)
- Materials and/or supplies
- Guidance and/or supplemental resources
- Other: Engagement with education and community partners in spring 2026

23. Has this item changed since the last Board meeting?

- N/A; this item has not previously been before the Board
- No; same as last month
- Yes; please review Appendix A: Second Reading below.

OAR 581-XXX-XXXX

Interim Assessments

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[ED. NOTE: The list of interim assessments referenced is available from the Oregon Department of Education upon request.]

Statutory/Other Authority: ORS 329.485

Statutes/Other Implemented: ORS 329.485

Program Budgeting and Accounting Manual

For Education Agencies and
Education Service Districts in
Oregon

2027 Edition



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State Board Policy

It is the policy of the Oregon State Board of Education and a priority of the Oregon Department of Education that there shall be no discrimination or harassment on the grounds of race, color, sex, marital status, religion, national origin, age, sexual orientation, or disability in any educational programs, activities, or employment.

Questions about equal opportunity and nondiscrimination should be directed to the Deputy Superintendent of Public Instruction, Oregon Department of Education, 255 Capitol Street NE, Salem, Oregon 97310. Phone: (503) 947-5740.

The **Fiscal Transparency Unit, Office of Finance and Information Technology** produced this manual. It may be accessed on the Fiscal Transparency Unit webpage. All or any part of this manual may be reproduced for educational purposes without permission from the Oregon Department of Education.

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Foreword

This **2027 edition** of the Program Budgeting and Accounting Manual (PBAM) is a comprehensive revision of the 2023 edition. Effective **July 1, 2026**, for use in the 2026-27 fiscal year.

The PBAM has evolved since its first statutory requirement under **House Bill 3636 (1997)**, which directed the Department to review, modify, and improve the existing chart of accounts for school districts and education service districts. The aim has always been to provide comparability, consistency, and fiscal transparency across Oregon's education system.

The 2027 revision reflects:

- **New GASB standards** (e.g., GASB 87 Leases, GASB 96 Subscription IT Arrangements, GASB 100 Accounting Changes).
- **Federal compliance updates** (Uniform Grant Guidance 2 CFR 200, ESSA, IDEA).
- **Modernized chart of accounts** aligned to NCES and Oregon's statutory requirements.
- **Input** from districts, ESDs, auditors, and professional associations.

This manual is designed to be both a **compliance reference** and a **practical guide** for financial managers, budget officers, and school business officials.

ODE recognizes that implementation of the 2027 PBAM represents a significant transition for districts and education service districts. To support a smooth rollout, the Department will provide technical assistance, training sessions, and tools throughout FY 2026 to assist agencies in updating local systems and practices prior to the July 1, 2026 effective date.

Sincerely,

Dr. Charlene Williams

Deputy Superintendent of Public Instruction

Acknowledgements

The **Chart of Accounts Review Committee**, as required under [ORS 327.511](#), included representatives from:

- The Legislative Revenue Office
- The Legislative Fiscal Office
- The Oregon Department of Administrative Services
- Education organizations representing kindergarten through grade 12

We extend gratitude to the dedicated district and ESD staff who contributed their time, expertise, and insight. Their work ensures the PBAM reflects both **national best practice** and **Oregon-specific needs**.

Your commitment strengthens fiscal transparency and accountability in Oregon's schools, supporting students and communities statewide.

Chapter 1: Introduction and Framework

Purpose of the PBAM

The **Program Budgeting and Accounting Manual (PBAM)** establishes the uniform financial accounting and reporting framework for Oregon’s school districts, education service districts (ESDs), and charter schools. It ensures that all Oregon Education Agencies (EAs) prepare and report financial information in a consistent manner, enabling:

- Compliance with **state law** and **federal requirements**,
- Comparability of financial data across districts,
- Transparency for policymakers and the public, and
- Accountability for the stewardship of public funds.

The PBAM is the **authoritative reference** for classifying transactions, preparing budgets, and developing financial reports within Oregon’s K–12 education system.

Legal Authority

The PBAM is established under [ORS 327.511](#), which requires the Oregon Department of Education (ODE), with the advice of the Chart of Accounts Review Committee, to develop and maintain a standardized chart of accounts for education agencies.

It is also guided by:

- [Oregon Local Budget Law \(ORS Chapter 294\)](#),
- [Oregon Administrative Rules](#) governing financial reporting,
- [Governmental Accounting Standards Board \(GASB\)](#) pronouncements,
- [Uniform Grant Guidance \(2 CFR 200\)](#) for federal funds, and
- [NCES Financial Accounting Handbook](#) standards for national comparability.

Scope and Application

This manual applies to all Oregon Education Agencies, including:

- **School districts**,
- **Education Service Districts (ESDs)**,
- **Charter schools** authorized by districts or the State Board of Education, and
- Other entities required to report financial data to ODE.

It is binding for financial reporting submitted to ODE and should also guide local accounting practices, annual audits, and budget preparation.

Accounting Principles and Framework

Oregon Education Agencies prepare financial statements in accordance with **Generally Accepted Accounting Principles (GAAP)** for state and local governments. These principles are defined by the [Governmental Accounting Standards Board \(GASB\)](#) and provide the foundation for this manual. Key elements include:

- **Fund Accounting:** segregation of resources by purpose, restriction, or legal mandate,
- **Measurement Focus and Basis of Accounting:** modified accrual for governmental funds, accrual for proprietary and fiduciary funds,
- **Consistency and Comparability:** uniform coding ensures valid analysis across districts and years,
- **Transparency and Accountability:** reporting designed to support oversight by boards, legislators, auditors, and the public.

Oregon-Specific Considerations

While aligned to national standards, the PBAM incorporates Oregon-specific features, including:

- **Local Budget Law Compliance:** ensuring districts adopt, appropriate, and amend budgets consistent with statutory processes,
- **Grant Accounting:** alignment with federal and state program reporting requirements, including ESSA, IDEA, and Oregon-specific initiatives such as the **Student Investment Account (SIA)** and **Measure 98 High School Success**,
- **State School Fund (SSF):** the primary mechanism for distributing state funding, requiring accurate tracking of allocations and expenditures,
- **Fiscal Transparency Goals:** supporting the Legislature's and Governor's priorities for clear, comparable public reporting on education finance.

Structure of the PBAM

The PBAM is organized into chapters that follow the logical flow of public financial management:

1. **Introduction and Framework** – Purpose, authority, principles, scope.
2. **Accounting Principles & Fund Structure** – GAAP hierarchy, fund classifications, measurement focus.
3. **Budgeting & Budgetary Accounting** – Budget law process, encumbrances, appropriations.
4. **Financial Reporting Requirements** – Financial statements, capital assets, liabilities, disclosures.
5. **Internal Controls, Compliance & Audit** – Roles, COSO framework, grant compliance, audit expectations.

6. **Chart of Accounts & Classifications** – The detailed coding structure for funds, programs, functions, objects, and grants.
7. **Cost Accounting & Program Reporting** – Cost allocation, school-level reporting, federal principles.
8. **Activity Fund Management** – Policies, classification, and internal controls.
9. **Appendices** – Glossary, crosswalks, reporting requirements, sample forms.

Updates and Revisions

This manual will be updated periodically to reflect:

- New **GASB pronouncements**,
- **Legislative changes** to Oregon budget or education law,
- Updates to **federal requirements** (e.g., UGG), and
- Recommendations from the **Chart of Accounts Review Committee**.

The **2027 Edition** is effective **July 1, 2026**, for the fiscal year 2026–27.

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Chapter 2: Financial Reporting in Oregon's Education System

Purpose of Financial Reporting

Financial reporting is the foundation of accountability for Oregon Education Agencies (EAs). Reliable, comparable information ensures that:

- Policymakers can evaluate the state's funding model and district financial health,
- Auditors can test compliance with state and federal laws, and
- The public can see how resources are being used to support student outcomes.

Uniform reporting through PBAM strengthens fiscal transparency, comparability, and equity across all districts and Education Service Districts (ESDs).

Background

Oregon's reporting framework brings together district-level accounting data with state and federal requirements. District submissions are used for:

- ODE statewide reports (budget and actuals),
- Federal surveys such as NPEFS, F-33, and SLFS, and
- Legislative oversight (State School Fund distributions, program evaluations).

A standardized chart of accounts makes it possible to aggregate data across districts, compare Oregon nationally, and track long-term equity and adequacy of funding.

Fiscal Equity and Accountability

The State School Fund (SSF) distributes resources based on student needs. Accurate reporting is essential to:

- Ensure allocations are distributed as intended,
- Demonstrate that funds are used for their authorized purposes, and
- Help policymakers understand the actual costs of providing an adequate education.

This framework reinforces Oregon's constitutional and statutory commitments to transparency and equity.

Applications of Financial Data

Financial reporting supports:

- **Policy and Oversight** – budget monitoring, legislative fiscal analysis, and compliance verification.
 - **Financial Health** – monitoring solvency, fund balance sufficiency, and fiscal distress.
 - **Transparency and Research** – informing taxpayers and policymakers, supporting academic studies, and enabling national comparisons.
 - **Operational Planning** – aligning staffing, capital investments, and instructional priorities with available resources.
-

Oregon's Commitment to Transparency

By aligning with national standards while addressing Oregon-specific needs, PBAM emphasizes:

- **Understandability** – clear and accessible data presentation,
 - **Reliability** – accurate and complete reporting,
 - **Relevance** – data that supports meaningful decisions,
 - **Timeliness** – reporting deadlines that increase usefulness, and
 - **Comparability** – consistent reporting across districts and states.
-

Chart of Accounts Modernization Project

The 2027 PBAM reflects Oregon's multi-year **Chart of Accounts Modernization Project**. Guided by broad stakeholder input, the project:

- Clarifies and separates dimensions such as program, function, and source,
- Introduces new fields for grant and accountability tracking, and
- Aligns Oregon's COA with NCES and GAAP reporting standards.

The goal is to **reduce reporting burden** by simplifying structures and creating consistency across systems. Together with this manual and a redesigned collection system, modernization ensures transparency and usability for both districts and the state.

Monthly Trial Balance Collection

Beginning in FY 2026–27, districts will submit a **monthly trial balance** to ODE. Each submission will pass through validation to:

- Promote consistency in reporting,
- Identify discrepancies earlier in the year, and
- Ensure year-end reports align with audited financial statements.

This cadence improves timeliness of information, reduces district need to conform the data to multiple different formats, and reduces reconciliation work at fiscal year-end. Districts are expected to complete a regular **month-end close** process prior to submission, including posting transactions, reconciling accounts, reviewing budget-to-actual activity, and making necessary adjustments.

A recommended close schedule is provided in [Appendix E](#).

ODE may phase in the monthly trial balance submission requirement through a pilot group or staggered implementation during the first year, allowing districts time to adapt systems and processes while ensuring statewide consistency and data reliability.

Detailed financial reporting requirements, including statement formats and disclosures, are addressed in Chapter 6.

Federal Monitoring Requirement:

As a pass-through entity, ODE is required by [2 CFR §200.332](#) to monitor subrecipients using a risk-based approach, and by [2 CFR §200.302](#) to ensure that district financial systems can identify federal awards, track expenditures at the grant level, and produce reports in a timely manner.

The PBAM **Grant Dimension (see Chapter 7)** provides the mechanism for this compliance. By coding all federal and state awards consistently to the Grant Dimension (including Assistance Listing Numbers), districts enable ODE to meet federal monitoring requirements and ensure that their financial systems provide accurate, timely, and complete grant reporting.

PBAM and COA Compliance

Purpose

To promote consistent statewide accounting and reporting, all Oregon Education Agencies (EAs)—including school districts, education service districts (ESDs), charter schools, and recovery or alternative schools—are expected to follow the standards established in the Program Budgeting and Accounting Manual (PBAM). These provisions help ensure that all public education entities receiving state or federal resources uphold fiscal integrity, comparability, and transparency.

Authority

This section is established under [ORS 327.511](#) and [OAR 581-023-0035](#), which require school districts, ESDs, and charter schools to maintain accounting records consistent with the uniform chart of accounts prescribed by the Oregon Department of Education (ODE).

ODE has the authority to prescribe, monitor, and support compliance with the PBAM and may take corrective or administrative action when necessary to ensure statewide consistency. Recovery and alternative programs operating under district or charter sponsorship are held to the same standards as their authorizing agencies.

Compliance Requirements

Education Agencies must:

- Use the PBAM chart of accounts and definitions for all financial transactions, budgeting, and reporting submitted to ODE.
- Maintaining accounting systems that support coding accuracy and consistency with PBAM structures
- Submit required financial and audit reports in the format, frequency, and detail prescribed by ODE.
- Ensure that charter and recovery schools under their authority follow the same accounting, budgeting, and reporting standards.
- Cooperate in reviews, reconciliations, or audits conducted by ODE or its designees.

Monitoring and Review

ODE conducts ongoing reviews of financial reporting by districts, ESDs, charter schools, and recovery schools through data validations, audit reconciliations, and risk-based monitoring.

These activities assess:

- Proper classification of revenues, expenditures, and balance-sheet accounts;
- Consistency between local submissions and audited financial statements;
- Adherence to grant tracking and Uniform Grant Guidance requirements; and
- Overall compliance with PBAM coding and reporting expectations.

When inconsistencies or areas for improvement are identified, ODE will work collaboratively with the Education Agency to resolve issues. Agencies may be asked to submit a corrective action plan, revised reports, or other documentation to demonstrate compliance.

Support and Corrective Actions

ODE's approach to compliance emphasizes technical support, transparency, and continuous improvement. Depending on the circumstances, ODE may:

Support or Corrective Action	Description
Technical Assistance	ODE provides written notice of findings and works with the Education Agency to identify solutions within a reasonable timeframe.
Enhanced Monitoring	ODE may increase oversight, request additional information, or schedule follow-up reviews until issues are resolved.
Temporary Funding Hold	In rare cases, ODE may delay State School Fund distributions or other state resources until the required corrections are completed and verified.

Restoration of Funding

Funds withheld due to noncompliance will be released once ODE confirms that the Education Agency has:

- Implemented approved corrective actions,
- Submitted accurate and validated financial data, and
- Received written confirmation of compliance from ODE.

Commitment to Improvement

ODE is committed to fostering a culture of collaboration and shared accountability. Consistent application of PBAM standards strengthens the quality, reliability, and transparency of Oregon’s education finance system. The Department will continue to offer guidance, training, and communication to help all education entities maintain compliance and improve reporting practices statewide.

Charter and Recovery Schools

Charter and recovery schools are subject to the same chart of accounts, accounting standards, and reporting requirements as their sponsoring districts under [ORS 338.095](#) and [OAR 581-026-0100](#) through [581-026-0200](#).

Each charter or recovery school must be assigned a distinct Location code within the sponsoring district’s accounting system, enabling identification and disaggregation of revenues and expenditures.

Education Service District (ESD) Coding of Services

When an Education Service District (ESD) provides services to a school district, each ESD should assign a Location code for the school or district served. This ensures that expenditures and revenues can be traced to the benefiting entity.

The Location code must align with the district or charter receiving services to allow for accurate statewide roll-ups, transparent cost allocation, and verification of service delivery in compliance with OAR [581-024-0206](#) and the ESD Local Service Plan requirements.

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Chapter 3: Budgeting and Budgetary Accounting

Purpose of Budgeting

Budgeting is the foundation of fiscal management in Oregon’s education system. It is both a legal requirement and a management tool that serves as:

- A policy document translating educational priorities into financial terms,
 - A financial plan allocating resources to achieve goals,
 - A control mechanism ensuring expenditures do not exceed legal appropriations, and
 - A communication tool engaging the community in understanding how schools are funded.
-

Legal Authority and Oversight

Oregon’s Local Budget Law (ORS Chapter 294) governs the budget process for school districts, ESDs, and community colleges.

- The Department of Revenue (DOR) is the statutory authority responsible for interpreting, monitoring, and enforcing compliance with Local Budget Law ([ORS 294.495](#), [294.510](#)). DOR may require revisions to budgetary procedures and hear appeals of local budget law disputes.
 - The Department of Education (ODE), through State Board of Education rules, requires school districts and ESDs to appropriate expenditures by ODE functions as defined in the Program Budgeting and Accounting Manual (PBAM). This ensures statewide comparability of budgets and financial reporting.
 - Thus, DOR enforces compliance with process, while ODE provides the classification framework and ongoing monitoring of how educational budgets are structured.
-

Budgetary Principles

Oregon Education Agencies must follow generally accepted governmental budgeting principles, which include:

- Annual adoption – Budgets must be adopted each fiscal year (or biennium, if authorized).
- Legal appropriations – Expenditures may not exceed the amounts appropriated by fund.
- Encumbrance accounting – Purchase orders and contracts should be encumbered to prevent overspending.
- Balanced budgets – Total resources must equal total requirements ([ORS 294.388](#)).

- Transparency – The process must include public notice, public hearings, and board approval.
 - Uniformity – Districts must appropriate by PBAM functional classifications to maintain comparability statewide.
-

The Local Budget Process (ORS 294)

1. Preparation

- Appoint a Budget Officer ([ORS 294.331](#)).
- Form a Budget Committee ([ORS 294.414](#)).
- Prepare the proposed budget ([ORS 294.426](#)).
- Develop enrollment projections and revenue estimates to align with State School Fund allocations.

2. Notice and Committee Review

- Publish notice of budget committee meetings ([ORS 294.401](#)).
- Present the Budget Message explaining priorities and assumptions ([ORS 294.408](#)).
- Budget Committee reviews, revises, and approves the proposed budget.

3. Public Engagement

- Publish a summary and notice of the public hearing ([ORS 294.448](#)).
- Hold a budget hearing for public testimony ([ORS 294.453](#)).
- Document and address community input before adoption.

4. Adoption

- Adopt the budget and make appropriations ([ORS 294.456](#)).
- Impose and categorize property taxes ([ORS 294.458](#)).
- File tax certification forms with the county assessor and ODE.

5. Post-Adoption Adjustments

- Supplemental budgets ([ORS 294.471](#)): Required for changes to appropriations not anticipated in the adopted budget.
- Transfers of appropriations ([ORS 294.463](#)): Allowed within limits by board resolution.
- Emergency expenditures ([ORS 294.481](#)): Permitted for unforeseen events requiring immediate action.

Budgetary Approaches

Districts may adopt different budgeting approaches depending on local needs:

- Line-Item Budgeting – Focused on controlling specific expense categories.
 - Program Budgeting – Aligns resources with educational programs (required for ODE reporting).
 - Performance Budgeting – Links resources to measurable outcomes.
 - Zero-Based Budgeting (ZBB) – Requires justification of all expenditures.
 - Site-Based Budgeting – Decentralizes allocation decisions to schools or departments.
-

Financial Forecasting and Planning

Effective budgets must be grounded in realistic forecasts:

- Enrollment projections drive SSF revenues.
 - Revenue forecasting must consider property tax trends, state aid, and federal grants.
 - Expenditure forecasting should account for salaries, benefits, inflation, and long-term contractual commitments.
 - Cash flow analysis ensures sufficient liquidity throughout the year.
 - Fund balance monitoring protects solvency and ensures compliance with ORS requirements for balanced budgets.
-

Capital and Grant Program Budgeting

Some programs require multi-year financial planning:

- Capital Projects – Bond-funded construction and major facility investments must be integrated into the budget with transparency on debt service and project scope.
 - Grants and Restricted Programs – Federal (ESSA, IDEA) and state programs (e.g., Student Investment Account, Measure 98) require separate tracking to ensure resources are used for their intended purpose and compliance with federal Uniform Grant Guidance (2 CFR 200).
-

District Budget Checklist (Practical Tool)

At a minimum, each Oregon Education Agency should:

- Adopt a budget calendar and communicate deadlines,
 - Appoint a budget officer and budget committee,
 - Prepare and present a budget message,
 - Publish required notices,
 - Review and revise the proposed budget with the committee,
 - Hold a public hearing and adopt the budget by board resolution,
 - Make appropriations by fund and ODE functional classification,
 - Certify property taxes to the county assessor,
 - File required forms with ODE and ESD,
 - Monitor budget-to-actuals monthly,
 - Adopt supplemental budgets as needed, and
 - Maintain budget records in accordance with ORS 294 and PBAM standards.
-

Oregon's Commitment to Transparency

The budgeting process is more than a statutory obligation — it is a demonstration of Oregon's commitment to fiscal transparency in education. By requiring districts to budget by ODE functional classifications within the PBAM, the state ensures:

- Consistency across districts,
- Compliance with Local Budget Law,
- Accountability to voters and taxpayers, and
- Alignment of resources with educational outcomes

Chapter 4: Governmental Accounting in Oregon

Purpose

Governmental accounting provides the framework for demonstrating accountability to students, taxpayers, and policymakers. Unlike private business accounting, it emphasizes stewardship of public resources and compliance with statutory and grant requirements.

GAAP Hierarchy

Oregon EAs follow **GAAP** as defined by GASB. Under [GASB Statement 76](#):

- **Category A** – GASB Statements and Interpretations,
- **Category B** – GASB Technical Bulletins, Implementation Guides, and AICPA literature (as applicable to governments).

Other sources may be used only if no authoritative guidance exists.

Fund Accounting

Governmental accounting is organized on a **fund basis**:

- **Governmental Funds (Modified Accrual)** – General, Special Revenue, Capital Projects, Debt Service, Permanent.
- **Proprietary Funds (Accrual)** – Enterprise, Internal Service.
- **Fiduciary Funds (Accrual)** – Pension/OPEB Trusts, Investment Trusts, Private-Purpose Trusts, Custodial.

Key Principles

- Funds exist to demonstrate fiscal accountability.
 - Districts should maintain the **minimum number of funds** required for legal and financial purposes.
 - Restricted vs. unrestricted resources should be tracked using PBAM dimensions (program, source, grant) instead of proliferating funds.
-

Measurement Focus and Basis of Accounting

- **Government-wide statements** – economic resources focus, accrual basis.

- **Governmental funds** – current financial resources focus, modified accrual basis.
 - **Proprietary and fiduciary funds** – economic resources focus, accrual basis.
-

Transaction Types

- **Exchange** – equal value exchanged.
 - **Exchange-like** – values exchanged not exactly equal.
 - **Nonexchange** – one party gives without equal compensation, including derived tax revenues, imposed revenues, government-mandated grants, and voluntary nonexchange transactions.
-

Financial Statement Elements

- **Assets** – resources with service potential.
 - **Liabilities** – obligations to transfer resources.
 - **Deferred outflows/inflows** – consumption/acquisition of resources for future periods.
 - **Fund balance (GASB 54)** – non-spendable, restricted, committed, assigned, unassigned.
 - **Net position** – net investment in capital assets, restricted, unrestricted.
-

Capital Assets and Debt

- **Capital assets** – land, buildings, equipment, right-to-use assets (leases), subscription-based IT assets.
- **Capitalization thresholds** – district policy; recommended minimum \$10,000.
- **Depreciation** – straight-line unless modified approach applies.
- **Debt** – reported as other financing sources in governmental funds; liabilities in government-wide statements.

Chapter 5: Internal Controls, Compliance, and Audit

Purpose

Internal controls are the backbone of sound financial management. They provide reasonable assurance that public resources are safeguarded, financial reporting is accurate, and statutory and grant requirements are met. For Oregon Education Agencies (EAs), internal controls are not only best practice but a statutory obligation under ORS Chapters 294 and 327.

Every district, regardless of size, must design controls that:

- Protect assets from loss, fraud, or misuse,
- Ensure the integrity of financial records,
- Support compliance with state and federal requirements, and
- Promote efficient operations aligned with educational goals.

COSO Framework

The nationally recognized, Committee of Sponsoring Organizations of the Treadway Commission (COSO) framework provides a structure for designing and evaluating internal controls. Its five components are interconnected and work best when applied together:

- **Control Environment** – Leadership sets the “tone at the top” through board oversight, ethics standards, conflict-of-interest policies, and professional development.
- **Risk Assessment** – Districts must identify and evaluate risks (e.g., cash handling, federal grant compliance, IT security) and plan responses.
- **Control Activities** – These are the day-to-day safeguards, such as purchase approvals, reconciliations, segregation of duties, and physical protections.
- **Information and Communication** – Reliable financial data must flow to the right people at the right time, from clerks and principals to boards and state agencies.
- **Monitoring** – Controls must be reviewed regularly, both internally and by external auditors, with corrective actions taken promptly.

Roles and Responsibilities

Responsibility for internal controls is shared across all levels of an education agency. The following groups each play a role in ensuring effective oversight and accountability:

- **Policy-Level Oversight** – The School Board adopts financial policies, reviews audits, and sets expectations for transparency.

- **Administrative Leadership** – The Superintendent promotes a culture of integrity, while CFOs/Business Managers design and oversee financial systems. Principals and site administrators enforce compliance at the school level, especially for activity funds.
 - **Staff Implementation** – All employees must follow established procedures. Ongoing training is essential, so expectations are clear.
 - **Independent Verification** – External auditors provide assurance that controls are working and recommend improvements.
-

Key Control Procedures

At minimum, every district should have controls in the following areas:

- **Segregation of Duties** – No single person should authorize, record, and maintain custody of assets.
 - **Cash Handling** – All receipts must be deposited intact and promptly; disbursements may never be made directly from cash collections.
 - **Procurement** – Purchasing should follow pre-approved processes, with competitive bidding where required and clear documentation of vendor selection.
 - **Payroll** – Timesheets and payroll registers should be independently reviewed and reconciled.
 - **Bank Reconciliation** – Accounts should be reconciled monthly, with review by someone not involved in cash handling.
 - **IT and Access Controls** – System access should be limited, passwords secured, and permissions reviewed periodically.
-

Compliance Requirements

Oregon Education Agencies must operate within a layered compliance environment:

- **State Law** – ORS 294 (Local Budget Law) and ORS 327 (School Finance Statutes),
- **Federal Law** – Uniform Grant Guidance (2 CFR 200), covering allowable costs, procurement, and subrecipient monitoring,
- **Standards** – GASB pronouncements that govern accounting and financial reporting.

Each district should maintain written policies covering these requirements, with annual review and board approval.

A core component of internal controls is compliance with Uniform Grant Guidance. ODE is federally required to monitor subrecipients ([2 CFR §200.332](#)). Districts must maintain financial systems that support ODE's

monitoring by coding grants accurately, producing reports on schedule, and ensuring expenditures are supported by documentation.

Audits

Audits provide independent assurance that financial statements are accurate, and funds are properly managed.

- **Annual Financial Audit** – Required under ORS 297.405 to test compliance with GAAP, GASB, and state law.
- **Federal Single Audit** – Required under 2 CFR 200 Subpart F for entities spending \$1,000,000 or more in federal funds. Districts must prepare a Schedule of Expenditures of Federal Awards (SEFA) that reconciles with ODE data.

Common Audit Findings in Oregon include:

- Misclassified or improperly coded federal expenditures,
- Weak segregation of duties (especially in smaller districts),
- Missing or inadequate documentation for claims, and
- Misclassification of activity funds between fiduciary and governmental.

Proactive communication with auditors and prompt follow-up on findings, reduce the risk of repeat issues.

Continuous Improvement

Internal controls must evolve with changing requirements and risks. Districts should:

- Conduct periodic self-assessments,
- Update practices such as GASB or federal standards change,
- Implement and monitor auditor recommendations, and
- Provide regular staff training.

Embedding strong controls into everyday operations not only protects resources but also builds public trust in Oregon's schools.

Districts may use **Appendix E – Internal Control Checklists** as a practical tool to assess compliance with the requirements in this chapter. The checklists provide step-by-step guidance for areas such as cash handling, procurement, payroll, activity funds, and year-end closing. While not a substitute for district policy, they serve as a baseline resource to strengthen consistency, support audit readiness, and ensure that minimum internal control standards are in place across schools and departments.

Chapter 6: Financial Reporting Requirements

Purpose

Oregon Education Agencies must prepare financial statements and reports that comply with:

- **GAAP** as defined by GASB,
 - **State statutes** (ORS 294 and ORS 327), and
 - **Federal mandates**, including Uniform Grant Guidance and NCES survey requirements.
-

The Reporting Entity

Per [GASB 14](#) and [GASB 39](#), the reporting entity includes the primary government (district/ESD) and component units that are financially dependent or closely related. Examples:

- Charter schools with fiscal dependence,
- Blended units such as district-controlled foundations, and
- Discretely presented units where exclusion would be misleading.

Districts must reassess annually whether related organizations meet inclusion criteria.

Financial Reporting Model

In compliance with GASB 34, Oregon districts must present two levels of statements:

1. Government-wide Statements (Accrual Basis)

- Statement of Net Position
- Statement of Activities

2. Fund Statements

- Governmental funds (modified accrual): Balance Sheet; Statement of Revenues, Expenditures, and Changes in Fund Balances
- Proprietary funds (accrual): Statement of Net Position; Statement of Revenues, Expenses, and Changes in Net Position; Statement of Cash Flows
- Fiduciary funds (accrual): Statement of Fiduciary Net Position; Statement of Changes in Fiduciary Net Position

Budgetary Reporting

Districts must adopt a balanced budget before each fiscal year begins. GASB requires:

- Budget-to-actual comparisons for the General Fund and major Special Revenue Funds,
- Presentation of original, final, and actual results, and
- Explanations for significant variances.

Districts must maintain reconciliations between adopted budgets and actual expenditures, including adjustments for encumbrances and supplemental budgets.

Capital Assets

Definition

Capital assets include land, land improvements, buildings, building improvements, vehicles, equipment, technology, and intangible assets such as software or subscription-based IT arrangements. They represent a major investment in public resources and require strict accountability.

Recordkeeping Requirements

Districts must maintain detailed records that include:

- Asset description and identification number,
- Acquisition date and historical cost,
- Funding source (if applicable),
- Location and custodian,
- Estimated useful life, and
- Method and date of disposal.

These records must be updated annually and retained to satisfy audit, insurance, and federal compliance requirements (see [2 CFR 200.313](#)).

Capitalization vs. Inventory Thresholds

- Inventory control threshold: Districts may track items valued at \$500 or more for control and insurance, even if not capitalized.
- Capitalization threshold: Assets with a value of **\$10,000 or more** and useful life > 1 year should be capitalized in financial statements.

- Thresholds may vary by district policy but must be applied consistently.

Acquisition of Capital Assets

- Purchase – Recorded as capital outlay expenditures (Objects 6000–6999) in governmental funds; capitalized in government-wide statements at historical cost.
- Leases – Recorded under [GASB 87](#); right-to-use assets are capitalized with corresponding lease liability.
- Subscription-based IT arrangements – Recorded under [GASB 96](#).
- Short-term rentals – Recorded as expenditures (Object 5600), not capitalized.
- Donations – Recorded at fair market value as of acquisition date.

Valuation

- Historical cost is preferred and includes purchase price, tax, shipping, and installation.
- Estimated historical cost may be used if records are unavailable, based on appraisal, comparable purchases, vendor input, or inflation-adjusted estimates.
- All estimation methods must be documented for audit purposes.

Reporting by Fund Type

- Governmental funds – acquisitions are expenditures; capital assets appear only in government-wide statements.
- Proprietary funds – assets recorded and depreciated within the fund.
- Fiduciary funds – assets reported in fiduciary statements but excluded from government-wide.

Depreciation

- Method – Straight-line depreciation is recommended unless another better reflects usage.
- Useful lives – Established by district policy. Examples:
 - Buildings: 25–50 years
 - Building improvements: 10–20 years
 - Vehicles: 5–10 years
 - Technology: 3–7 years
 - Equipment/Furniture: 5–15 years
- Assets may be depreciated individually or in groups.

Disposals

When assets are sold, scrapped, or transferred:

- Remove both asset cost and accumulated depreciation from records,
 - Document disposal method,
 - Recognize gains/losses.
-

Liabilities and Debt

Districts must report both short- and long-term obligations, including:

Bonds, COPs, notes payable

Purpose and Scope

Bonds, Certificates of Participation (COPs), and notes payable are common long-term financing mechanisms used by Oregon Education Agencies (EAs) to fund capital projects, major equipment, or other long-term needs. Because these instruments obligate future resources, accurate accounting, transparency, and compliance with statutory requirements (ORS Chapter 328, ORS Chapter 287A) are essential.

This section establishes minimum requirements for recognition, measurement, presentation, and disclosure of bonded debt and other financing arrangements.

Types of Debt Instruments

- 1. General Obligation (GO) Bonds**
 - Secured by the full faith and credit of the district, backed by property taxes approved by voters.
 - Restricted in use by voter authorization and statutory debt limits.
- 2. Revenue Bonds**
 - Secured by a specific revenue stream (e.g., enterprise revenues, pledged fees).
 - Rare in Oregon K–12 but may apply in self-supporting enterprise operations.
- 3. Certificates of Participation (COPs)**
 - Represent a share in lease payments made by a district.
 - Allow financing of capital projects without voter approval but typically require board authorization and sometimes state review.

4. Notes Payable

- Short- to medium-term obligations, often for interim financing (e.g., tax anticipation notes, bank loans, equipment financing).
- Usually repaid from the General Fund or other designated funds when revenues are received.

Recognition and Measurement

Government-wide Statements (accrual basis)

- Record the debt liability at the time of issuance, equal to the amount of proceeds received (net of issuance costs).
- Record corresponding other financing sources (proceeds from debt).
- Amortize premiums, discounts, and deferred amounts over the life of the debt using the effective interest method.
- Accrue interest expense in the period incurred, whether paid or not.

Governmental Funds (modified accrual basis)

- Report proceeds as Other Financing Sources.
- Report debt service (principal and interest) as expenditures when due.
- Do not report long-term liabilities in governmental fund balance sheets.

Bond Issuance Costs, Premiums, and Discounts

- Issuance costs (e.g., legal, underwriting, administrative) are expensed as incurred (not capitalized).
- Bond premiums or discounts are amortized over the life of the bonds in government-wide statements, typically using the effective interest method.
- In governmental funds, premiums and discounts are recognized in the period received/paid and do not appear on the fund balance sheet.

Refunding of Debt

Refunding transactions occur when new bonds are issued to repay old bonds:

- Current refunding – new debt issued and immediately used to retire old debt.

- Advance refunding – proceeds placed in an irrevocable trust to pay future debt service on old bonds.

Accounting treatment:

- Record new debt at issuance; derecognize old debt when legally released.
- Record deferred outflows/inflows of resources for the difference between carrying amount and reacquisition price, amortized over the shorter of remaining life of old debt or new debt.

Debt Service and Compliance Requirements

Districts must:

- Establish **Debt Service Funds** (Fund 300) when required to accumulate resources for repayment.
- Levy taxes or designate other resources specifically for debt repayment.
- Monitor compliance with **ORS debt limitations** and voter-authorized purposes.
- Maintain **arbitrage rebate compliance** for federally tax-exempt bonds.

Disclosures (Minimum)

Notes to the financial statements must include:

- Description of outstanding debt, including purpose, type, and terms.
- Maturity schedules (principal and interest by year for at least the next 5 years, and in 5-year increments thereafter).
- Interest rates (fixed or variable) and debt service requirements.
- Call provisions, refunding, and defeasance transactions.
- Legal debt limit and margin under ORS.
- For COPs: underlying lease structure and pledged revenues.
- For notes: repayment source and any collateral pledged.

Example (GO Bond Issue)

At Issuance – Governmental Funds (Modified Accrual)

- Dr. Cash (Assets)

- Cr. Other Financing Sources – Bond Proceeds

At Issuance – Government-wide (Accrual)

- Dr. Cash
- Cr. Bonds Payable (Liability)
- Cr./Dr. Bond Premium/Discount (as applicable)

Debt Service Payments – Governmental Funds

- Dr. Debt Service Expenditure – Principal
- Dr. Debt Service Expenditure – Interest
- Cr. Cash

Debt Service Payments – Government-wide

- Dr. Bonds Payable (for principal)
- Dr. Interest Expense
- Cr. Cash

Internal Controls and Recordkeeping

Districts must:

- Maintain amortization schedules for each debt issuance (principal and interest breakdown).
- Reconcile schedules to trustee statements and general ledger balances.
- Document compliance with bond covenants and continuing disclosure requirements.
- Segregate duties between authorization (board resolution), execution (issuance/closing), and accounting (recording, reporting).

Lease and subscription liabilities

Leases and Subscription-Based IT Arrangements (SBITAs) — [GASB 87](#) & [GASB 96](#)

Purpose and scope

Districts frequently obtain the right to use assets through **leases** (e.g., buildings, vehicles, copiers) and **SBITAs** (software and hosted/Cloud solutions). GASB Statements **87** (Leases) and **96** (SBITAs) require recognition of

right-to-use assets and **corresponding liabilities** for all arrangements that convey control of the right to use specified non-financial (for leases) or IT (for SBITAs) assets over a defined term, in an exchange or exchange-like transaction. This section sets minimum recognition, measurement, presentation, and disclosure requirements for Oregon districts.

Core definitions (what is in / out of scope)

Lease (GASB 87). A contract that **conveys control** of the right to use another party's **non-financial assets** (e.g., land, buildings, equipment) for a **lease term** in an exchange or exchange-like transaction. Control exists when the district has (1) the right to obtain present service capacity from use of the underlying asset and (2) the right to determine the nature and manner of that use during the term.

SBITA (GASB 96). A contract that **conveys control** of the right to use another party's **IT software** (alone or with tangible IT assets) for a defined **subscription term** in an exchange or exchange-like transaction.

Out of scope (selected):

- Short-term leases/SBITAs (original maximum term **12 months or less** with no reasonably certain renewals).
 - Contracts that transfer **ownership** of the underlying asset to the district at term end without termination options (financed purchase).
 - Pure service contracts without a right-to-use component; **perpetual software licenses** (treat as intangible/capital asset, not SBITA).
 - Biological assets, inventory, and supply/power purchase agreements that do **not** convey control of the underlying facility.
-

Policy choices districts must document (practical expedients)

To drive consistency and auditability, each district should adopt policies for:

1. **Recognition threshold (de minimis).** Optional minimum present value (PV) below which arrangements are treated as period expenditures.
2. **Discount rate hierarchy.** (a) Rate explicitly stated in contract if it equals the implicit rate; otherwise (b) **incremental borrowing rate** for leases; (c) **risk-free rate option** is permitted (GASB guidance) when other rates cannot be practicably determined (apply consistently).
3. **Lease/subscription term assessment.** "Reasonably certain" criteria for exercising renewal or termination options.

4. **Portfolio approach** (optional). Group similar, immaterial leases/SBITAs with similar terms/rates for simplified accounting.
 5. **Separation of components**. Identify and separate **non-lease** service components (e.g., maintenance, consumables, implementation services) from the right-to-use component; allocate consideration on a **relative standalone price** basis when practicable.
-

Short-term arrangements (≤12 months)

- **Lessee/SBITA user**: Recognize **period expenditures** as payments are made; do **not** recognize an asset/liability.
 - **Lessor/SBITA provider**: Recognize **period revenue** as earned; no receivable/deferral beyond normal accruals.
-

Contracts that transfer ownership

If a contract **transfers title** at term end and lacks termination options, treat as a **financed purchase** by the lessee (capitalize the asset; record related debt) and as a **sale** by the lessor. Do **not** account for such contracts as leases under [GASB 87](#).

Lessee accounting — leases other than short-term or ownership-transfer

Initial measurement (government-wide basis)

- **Lease liability** = PV of payments expected during the term (fixed payments; variable payments that depend on an index/rate using **commencement date** index; amounts for reasonably certain options; residual guarantees likely to be owed; less incentives receivable).
- **Right-to-use lease asset** = lease liability + prepayments + initial direct costs – lease incentives received.

Subsequent measurement

- **Lease liability**: Increase for interest; decrease for payments. Remeasure upon changes in term, assessment of options, or certain variable payment changes tied to an index/rate.
- **Lease asset**: **Amortize** systematically (generally straight-line) over the **shorter of** the asset's useful life or lease term; test for impairment as needed.

Governmental funds (modified accrual presentation)

- At inception: recognize **other financing sources** and related **expenditure**/asset outlay in the fund acquiring the underlying asset **as permitted by GASB 87 fund-level guidance**; the **long-term liability and right-to-use assets** are **government-wide** only.
 - Payments: split **principal** and **interest** across appropriate debt service/expenditure objects at fund level; present full accrual impacts in government-wide statements.
-

Lessor accounting — leases other than short-term or ownership-transfer

Initial measurement

- **Lease receivable** = PV of lease payments expected to be received.
- **Deferred inflow of resources** = lease receivable + any prepayments received – incentives provided.

Subsequent measurement

- Recognize **interest revenue** using the effective interest method.
 - Recognize **lease revenue** by **systematic amortization** of the deferred inflow over the lease term.
 - The **underlying asset remains** reported and depreciated by the lessor (unless ownership transfers).
-

SBITA accounting (GASB 96) - subscriber/lessee

Initial measurement (government-wide basis)

- **Subscription liability** = PV of subscription payments for the term (same constructions as leases).
- **Subscription asset** = subscription liability + capitalizable implementation costs – incentives.

Subsequent measurement

- **Subscription liability**: interest accretion and payment reductions; remeasure for qualifying changes.
- **Subscription asset**: **amortize** over **subscription term** (straight-line typically); test for impairment.

Governmental funds

- Record **other financing sources** and **expenditures** at inception as applicable; recognize the long-term **subscription liability** and **subscription asset** at the **government-wide** level.

Development stages and cost capitalization (required by GASB 96)

1. **Preliminary project stage**: **Expense** activities like needs assessment, vendor demos, RFPs, and alternative evaluation.

2. **Initial implementation stage: Capitalize** configuration, coding, installation, essential data conversion, and testing necessary to place the subscription asset into service.
 3. **Operation/additional implementation: Expense** training, maintenance, and post-go-live enhancements that are not necessary to make the asset operational.
-

Term, discount rate, remeasurement, and modifications

- **Term** = non-cancelable period + periods covered by options to **extend** (reasonably certain) or **terminate** (reasonably certain **not** to be exercised). Include **fiscal funding/appropriation clauses** only if reasonably certain to be exercised.
 - **Discount rate**: implicit rate when determinable; otherwise, **incremental borrowing rate** (leases) or appropriate borrowing/risk-free rate (SBITAs) per district policy.
 - **Remeasurement** (both leases and SBITAs) when:
 - Term changes due to reconsidered options.
 - Contract is amended (add/remove underlying assets, price changes not previously expected).
 - Variable payments tied to an index/rate change if the contract requires remeasurement, or
 - Assessment of residual guarantees/payment factors changes.
 - **Modifications**: evaluate whether the modification is a **separate contract** (adds distinct right-to-use with commensurate price) or a **re-measurement** of the existing arrangement.
-

Allocating consideration and embedded arrangements

- **Separate** non-lease/service components (e.g., copier maintenance, toner, helpdesk) from right-to-use components; allocate total consideration on relative standalone prices.
 - Identify **embedded leases** or **embedded SBITAs** in broader service contracts, account for each component accordingly.
-

Presentation and disclosures (minimum)

Lessee (leases/SBITAs):

- Present **right-to-use** (or **subscription**) assets and related **liabilities** separately or disclose separately in the notes.

- Note disclosures:
 - General description of leasing/subscription activities, basis and terms of variable payments, options, residual guarantees, and restrictions.
 - **Maturity analysis** of principal requirements (by 5 subsequent fiscal years and in 5-year increments thereafter).
 - For SBITAs, disclose **capitalized implementation costs** by stage and amortization method.

Lessor (leases):

- Present **lease receivables** and **deferred inflows**; disclose the same qualitative terms, maturity analysis, and any component separation judgments.

Governmental funds:

- Disclose the nature of **other financing sources** recognized at inception and how lease/SBITA payments are budgeted (e.g., general vs. debt service fund).

Internal control and recordkeeping (minimum standards)

- **Contract repository** with executed agreements, amendments, payment schedules, renewal/termination options, and indices.
- **Central review** for scoping assessment (lease/SBITA vs. service) and term/discount determinations.
- **Amortization schedules** generated at inception; tie-out to entries; monitor remeasurement triggers.
- **Segregation of duties** for authorization (entering contracts), measurement (PV calculations), and recording (journal entries).
- **Reconciliations** between contract schedules and general ledger; periodic sample testing of payments vs. schedules.
- **Year-end procedures** to capture new contracts, renewals, and modifications prior to closing.

Illustrative example (lessee – lease)

- 5-year equipment lease; annual payments \$50,000 at year-end; discount rate 10%; PV of payments (liability) ≈ **\$208,493**; right-to-use asset initially equals liability (assuming no prepayments/incentives).
- Each year: recognize **interest expense** (effective interest) and **principal reduction**; **amortize** the right-to-use asset on a straight-line basis over 5 years. (A full amortization table should be maintained in the workpapers.)

Note: At the **fund** level, recognize the permissible **other financing source** at inception and split **principal/interest** outlays when payments occur; the **asset and long-term liability** appear in the **government-wide** statements.

Liability for Compensated Absences

Compensated absences are employee benefits for which future payments will be required, such as vacation leave, sick leave, personal time off, holidays, parental leave, jury duty, military leave, bereavement leave, and certain sabbaticals.

- **Governmental Funds**

In governmental funds, expenditures or liabilities for compensated absences are recognized only when they become due for payment. This means that only amounts expected to be liquidated with expendable available resources (e.g., payouts upon resignation or retirement during the fiscal year) are recorded. The unmatured portion of the liability is not recognized in governmental funds.

- **Government-wide Statements**

In government-wide statements prepared on the accrual basis of accounting, the full liability for compensated absences must be recognized as employees earn the benefit. This includes both the current portion (expected to be paid within one year) and the long-term portion (expected to be paid in future years).

- **Measurement Considerations**

Districts must estimate the amount of accumulated leave balances that are more likely than not to be used or paid. Factors to consider include:

- Historical usage patterns,
- Contractual or policy provisions regarding carryover of leave,
- Forfeiture rules for unused sick leave, and
- The likelihood of leave being paid out upon termination or retirement.

- **Associated Costs**

The liability for compensated absences must also include related payroll costs such as the employer's share of Social Security, Medicare, PERS contributions, unemployment insurance, and workers' compensation, if these costs will be incurred when leave is paid.

- **Reporting**

- **Governmental funds:** Only matured compensated absences (due and payable) are reported as expenditures.

- **Government-wide statements:** The entire earned liability, both current and long-term, must be reported as a liability on the Statement of Net Position. The current portion may be estimated based on trends or policies.
- Net pension and OPEB liabilities.

Disclosures must cover principal and interest schedules, collateral pledged, and any default provisions.

Revenues and Expenditures

Purpose

Revenues and expenditures represent the core inflows and outflows of financial resources for Oregon Education Agencies (EAs). Clear classification and consistent recognition are essential to:

- Demonstrate accountability for public funds,
 - Ensure compliance with GASB standards and Oregon statutes,
 - Provide comparability across districts, and
 - Support accurate state and federal reporting.
-

Revenue Classification

Revenue must be classified into two broad categories under GASB Statement 34:

1. Program Revenue
 - Charges for services – tuition, transportation fees, food service sales, enterprise revenues.
 - Operating grants and contributions – categorical aid such as Title I, IDEA, or Nutrition Services.
 - Capital grants and contributions – restricted for facilities, construction, or equipment purchases.
2. General Revenue
 - Property taxes and local option levies,
 - State School Fund allocations and other unrestricted state aid,
 - Unrestricted federal sources,
 - Investment earnings not restricted for a program,

- Miscellaneous unrestricted sources.

Why this matters: Classifying revenue into program vs. general allows readers to see the true “net cost of services.”

Revenue Recognition

Revenue recognition is governed by GASB Statement 33 and requires assessment of both measurability and availability/eligibility:

- Exchange transactions – Each party gives and receives equal value (e.g., cafeteria sales). Recognize when earned.
- Exchange-like transactions – Values exchanged are not equal (e.g., subsidized fees). Recognize when earned and measurable.
- Nonexchange transactions – One party provides value without directly receiving equal value in return:
 - Derived tax revenues – e.g., income or excise taxes (rare in Oregon schools).
 - Imposed nonexchange revenues – property taxes, fines, and penalties. Recognize when imposed and measurable, subject to availability.
 - Government-mandated revenues – state or federal programs such as IDEA or ESSA. Recognize when eligibility requirements are met.
 - Voluntary nonexchange revenues – discretionary grants and donations. Recognize when all eligibility criteria are met.

Availability criterion (governmental funds): Revenues must be collectible within the current period or soon enough thereafter (normally within 60 days) to be available to finance current expenditures.

Advance payments: Revenues received before eligibility requirements are met must be reported as Unearned Revenue (liability).

Property Taxes

Property taxes are a major local revenue source and must be recognized carefully:

- Revenue is recognized when levied and measurable, subject to the 60-day availability rule.
- Uncollected amounts not available are reported as Deferred Inflows of Resources.
- Financial statement notes must disclose levy, lien, and collection dates.

Federal and State Grants

- Expenditure-driven grants (e.g., Title programs) – Revenue recognized when allowable costs are incurred.
 - Entitlements and formula-based allocations (e.g., State School Fund, IDEA base allocation) – Recognize when eligibility criteria are satisfied.
 - Categorical aid – Restricted for specific uses and reported accordingly.
 - Advance payments – Recognize as liability until expenditures are made.
-

Local Revenues

- Tuition and fees – Charges to individuals or other districts, reported as program revenues.
 - Earnings on investments – General revenues unless legally restricted.
 - Donations and contributions – Recognized at fair market value when received.
 - Miscellaneous local sources – Includes rentals, leases, insurance recoveries, and one-time settlements.
-

Expenditure Classification

Expenditure must be reported at multiple levels of detail to meet GASB, Oregon budget law, and PBAM requirements:

- By Function – The purpose of spending:
 - 10 Instruction,
 - 20 Support Services,
 - 31 Enterprise Services,
 - 40 Facilities Acquisition and Construction,
 - 50 Debt Service.
- By Object – The nature of the expenditure:
 - 20 Salaries,
 - 21 Benefits,

- 22 Purchased Services,
 - 23 Supplies & Materials,
 - 24 Capital Outlay,
 - 26 Other Objects.
- By Program – Where required for reporting under PBAM (e.g., Special Education, Title I).

Encumbrances: Purchase orders and contracts should be recorded as encumbrances to prevent overspending appropriations. Encumbrances are not GAAP expenditures, but they are reported in budget-to-actual schedules.

Expenditure Recognition

- Governmental funds (modified accrual): Expenditures recognized when liability is incurred and payable from available resources.
 - Debt service expenditures are recognized when due.
 - Compensated absences recognized when matured (due and payable).
 - Government-wide (accrual): Expenses recognized when incurred, regardless of payment timing.
-

Special Oregon Considerations

- State School Fund (SSF): Report as general revenue unless specifically restricted; timing must align with appropriation and availability rules.
 - Nutrition Services: Report program revenues from food sales and federal reimbursements; code expenditures to Food Services function.
 - Student Body/Activity Funds: Classify as governmental or fiduciary depending on control (see Chapter 9).
 - Capital Outlay: Expenditures recorded in Objects 6000–6999 in fund statements; capitalized and depreciated at government-wide level.
 - Debt Service: Reported separately by function 5000; disclose principal and interest components in the notes.
-

GASB and Compliance References

- [GASB 33](#) – Nonexchange Transactions
 - [GASB 34](#) – Reporting Model
 - [GASB 36](#) – Pass-Through Grants
 - [GASB 54](#) – Fund Balance Classifications
 - [ORS Chapter 294](#) – Local Budget Law
 - [ORS Chapter 327](#) – School Finance
-

Required Disclosures

District financial statements must include notes that provide transparency, context, and detail to supplement the basic statements. GASB standards, Oregon statutes, and federal rules establish minimum disclosure requirements. At a minimum, districts must include the following:

1. Significant Accounting Policies

- A summary of the basis of accounting and measurement focus used in each fund (modified accrual for governmental funds; accrual for proprietary and fiduciary funds).
- The district’s capitalization threshold for capital assets and depreciation method.
- Policies for recognition of revenues (including “measurable and available” criteria for governmental funds).
- Basis for classifying fund balances and net position categories.
- Criteria for determining component units and method of presentation (blended vs. discrete).

Purpose: These policies help readers understand how the district applies GAAP and ensure comparability across districts and fiscal years.

2. Deposits and Investments

- Description of the district’s deposit and investment policies, including compliance with [ORS Chapter 295](#) (collateralization of public funds) and [ORS Chapter 294](#) (permitted investments).
- Breakdown of investments by type, maturity, and credit quality.
- Disclosures of custodial credit risk, concentration risk, interest rate risk, and foreign currency risk, per [GASB 40](#).

- Policies for fair value measurement ([GASB 72](#)).

Purpose: These disclosures demonstrate compliance with state law and provide assurance that public funds are safeguarded.

3. Property Tax Recognition

- Policy for recognizing property tax revenues, including the definition of “available” (typically 60 days after year-end).
- Description of the levy, lien, and collection dates.
- Amount of property taxes receivable and deferred inflows of resources.

Purpose: Property taxes are the largest local revenue source for most Oregon districts; clear disclosure ensures users understand timing differences between levy, collection, and recognition.

4. Pensions and Other Postemployment Benefits (OPEB)

- Description of pension/OPEB plans (e.g., Oregon Public Employees Retirement System – PERS).
- Contribution requirements, actuarial methods, assumptions, and discount rates.
- Net pension liability (asset), deferred outflows/inflows of resources, and related pension/OPEB expense.
- Sensitivity of net liability to changes in discount rate.
- Information required under [GASB 68](#) (Pensions) and [GASB 75](#) (OPEB).

Purpose: PERS obligations represent one of the largest long-term liabilities for districts; these disclosures give stakeholders a clear picture of long-term fiscal commitments.

5. Leases and Subscription Liabilities (GASB 87/96)

[GASB 87 Link](#)

[GASB 96 Link](#)

- General description of leasing and subscription activities.
- Schedule of future principal and interest requirements for leases and SBITAs, by year for the next five years and in five-year increments thereafter.
- Basis, terms, and conditions of variable payments, renewal options, termination clauses, and residual value guarantees.

- Amortization of deferred inflows for lessors and subscription/lease assets for lessees.

Purpose: New GASB standards require that right-to-use assets and subscription liabilities be transparent to readers; these disclosures explain the scale and terms of such obligations.

6. Contingencies and Commitments

- Disclosure of outstanding commitments for construction contracts, capital projects, or significant purchase agreements.
- Disclosure of litigation, claims, or grant compliance matters that could result in loss or additional obligations.
- Explanation of circumstances under which federal or state grant funds might be subject to repayment.

Purpose: These disclosures inform users about obligations that could impact future financial conditions, even if they are not yet recognized as liabilities.

7. Interfund Balances and Transfers

- Detail of due-to/due-from balances between funds at year-end, including purpose and expected repayment terms.
- Schedule of interfund transfers, distinguishing routine operating transfers, legally required transfers, and non-routine transfers (e.g., moving bond premium to a capital projects fund).
- Explanation of significant transfers that do not occur on a routine basis.

Purpose: These disclosures provide transparency on how resources are moved across funds and help identify structural budget imbalances if operating transfers are recurring.

Changes and Errors

Financial statements must present consistent and comparable information across periods. When changes or corrections are necessary, they must be accounted for in accordance with GASB Statement No. 100, Accounting Changes and Error Corrections (2024). This standard requires districts to distinguish between changes in principle, changes in estimates, changes in reporting entity, and error corrections, and to apply the appropriate accounting treatment.

1. Changes in Accounting Principle

A change in principle occurs when a district adopts a new accounting standard or voluntarily changes from one acceptable accounting principle to another.

- Examples: Adoption of a new GASB pronouncement (e.g., [GASB 87](#) on leases), or changing inventory valuation methods from FIFO to weighted average if both are GAAP.
 - Accounting treatment: Apply retroactively by restating prior periods presented, if practicable. This means adjusting beginning net position, fund balance, or other affected balances for the earliest period presented, as though the new principle had always been applied.
 - Disclosures:
 - Nature of the change,
 - Justification for why the new principle is preferable,
 - Method of applying the change, and
 - Impact on beginning balances and comparative data.
-

2. Changes in Accounting Estimate

A change in estimate results from new information or experience that affects the expected outcome of existing balances. Estimates are necessary when precise measurement is not possible.

- Examples: Revisions to estimated useful lives of capital assets, changes in assumptions about collectible property taxes, pension discount rate changes, or revised actuarial assumptions for OPEB.
 - Accounting treatment: Apply prospectively in the period of change and future periods affected. Do not restate prior periods.
 - Disclosures:
 - Nature of the change,
 - Effect on the current period, if material, and
 - Statement that prior periods have not been restated.
-

3. Changes in Reporting Entity

A change in entity occurs when the composition of the district's financial reporting entity changes.

- Examples: Addition or removal of a charter school as a component unit, consolidation of a blended foundation, or reclassification of a unit from discrete presentation to blending (or vice versa).
 - Accounting treatment: Apply retroactively by restating all periods presented as though the new entity structure had always been in place.
 - Disclosures:
 - Description of the nature of the change,
 - Justification for including or excluding the unit,
 - Restatement of prior periods for comparability.
-

4. Error Corrections

An error is an unintentional misstatement or omission in prior financial statements, such as misclassification, omission of assets or liabilities, or failure to apply GAAP.

- Examples: Misstated revenue recognition, failure to capitalize eligible assets, misreporting of interfund transfers, computational mistakes.
 - Accounting treatment: Correct retroactively by restating prior periods, if material. Adjust beginning balances of assets, liabilities, or fund/net position for the earliest period presented.
 - Disclosures:
 - Nature of the error,
 - Method of correction, and
 - Impact on prior-period financial statements and balances.
-

Materiality Considerations

- Only material changes or errors require restatement.
 - Immaterial items may be corrected in the current period without restating prior statements.
 - Districts should establish internal thresholds for evaluating materiality, subject to auditor review.
-

Presentation in Financial Statements

- Retroactive applications (principle changes, entity changes, and material errors) require restating prior-period financials and clearly labeling them “as restated.”
 - Prospective applications (estimated changes) are included in current and future statements without altering past periods.
-

Disclosure Requirements (Minimum)

For all changes and error corrections, districts must disclose in the notes:

1. The nature of the change or error,
2. The reason for the change (or description of the error),
3. The method of applying the change,
4. The effect on beginning net position/fund balance and prior-period results, and
5. If comparative financials are presented, the effect on all periods shown

See Chapter 4 for definitions of measurement focus and basis of accounting.

Chapter 7: Chart of Accounts and Account Classifications

Purpose

The Oregon Chart of Accounts (COA) establishes the **uniform financial coding structure** required for all Education Agencies (EAs). Dimensions are the backbone of Oregon’s fiscal transparency system. They must be **clearly defined, consistently applied, and uniformly reported** to ensure that data is reliable for:

- Comparability across districts and ESDs,
- Compliance with Oregon budget law and federal Uniform Grant Guidance ([2 CFR 200](#)),
- State and federal reporting requirements,
- Local budget development, audit compliance, and board decision-making.

The 2027 PBAM COA reflects Oregon’s **Chart of Accounts Modernization Project** (see Chapter 2), which simplified structures, clarified definitions, and added dimensions for transparency and grant tracking.

Importance of Dimensions

Every transaction must be coded across multiple dimensions. Each dimension answers a different question:

- **Fund** – *Which bucket of resources?*
- **Source** – *Where did the money come from?*
- **Program** – *Which instructional or support program benefits?*
- **Function** – *For what operational purpose is it used?*
- **Object** – *What was purchased or paid?*
- **Grant/Project** – *Is it tied to a restricted award?*
- **Operational Unit** – *Which school or department used it?*
- **Grade Level** – *Who benefited?*
- **Curriculum Area** – *Which subject?*
- **Accountability Measure** – *What outcomes does this spending support?*

Using dimensions consistently allows Oregon to answer questions from legislators, auditors, and the public with confidence.

Required Dimensions in PBAM 2027

1. Fund

Represents the **fiscal and accounting entity**.

- Required by **ORS Chapter 294** and **GASB**.
- Ensures legal compliance with appropriations.

- Examples: General Fund (100), Special Revenue (200), Debt Service (300).

Consistency rule: Do not create “special funds” locally when restricted purposes can be tracked through program or grant codes.

2. General Ledger Account

Captures **balance sheet elements** (assets, liabilities, fund balance) and **operating accounts** (revenues, expenditures, transfers).

- Provides reconciliation between district accounting and reporting to ODE.
- Supports audits and ensures GAAP compliance.

Consistency rule: Every GL account used locally must map back to a PBAM GL code.

3. Program

Identifies the **plan of activities** (who/what benefits).

- Examples: Core Instruction, Special Education, Career and Technical Education.
 - **Distinct from Function** – Program = beneficiary; Function = purpose.
-

4. Source

Tracks the **origin of revenue** (local, intermediate, state, federal).

- Required by ORS for budget adoption and revenue monitoring.
 - Aligns to federal NPEFS/F-33 survey categories.
-

5. Function

Represents the **broad operational purpose** of expenditure.

- Examples: 1000 Instruction, 2000 Support Services, 3000 Enterprise & Community Services.
- Required by GASB for financial statement presentation.

Consistency rule: Always distinguish between *program* (who benefits) and *function* (what activity was performed).

6. Object

Defines the type of item, service, or resource received or provided, distinguishing between expenditure and revenue classifications.

7. Grant/Project

Links transactions to **restricted resources** (federal ALNs, state program codes).

- Required for Uniform Grant Guidance ([2 CFR 200.302](#)).
- Oregon allows use of a separate grant-tracking system if it reconciles to PBAM.

Consistency rule: Every expenditure of restricted funds must carry a grant/project code.

Under [2 CFR §200.302](#) and [§200.332](#), ODE, as a pass-through entity, must ensure that subrecipient financial systems can identify and track federal awards at the grant level. The PBAM **Grant Dimension** provides the structure for districts to meet this requirement by coding all federal and state awards with unique identifiers (including ALN). This enables ODE to fulfill its federal monitoring responsibilities and districts to comply with Uniform Grant Guidance.

8. Grade Level

Identifies the **instructional level** benefiting from expenditures.

- Elementary, middle, high school.
- Previously embedded in functions; separated in PBAM 2027 for clarity.

Consistency rule: Must be applied to all instruction-related expenditures.

9. Location

A *location* is a distinct, operational unit within a district that:

- Occupies one or more adjacent buildings or facilities used primarily for instruction.
- Operates under a single site administrator or principal; and
- Reports a unique set of accountability data and student outcomes to ODE (e.g., test scores, attendance, enrollment).

The *Location* field identifies a specific, physical school campus or group of structures that operate as a unified instructional site under a principal or site administrator. The school represents the physical location where students receive instruction and where educational programs are delivered.

Each school site should correspond to a recognized campus in the **Oregon Department of Education's Institution Directory**, which serves as the authoritative listing of public schools, charter schools, and alternative learning environments statewide.

10. Curriculum Area

Tracks the **subject area** (math, science, CTE, arts).

- Supports analysis of resource allocation by subject.
- Required on instructional expenditures, optional for others.

11. Accountability Measure

Links costs to **performance outcomes**.

- Example: “Grade-level learning,” “Skillful instructional practices.”
 - Forward-looking dimension supporting Oregon’s fiscal transparency goals.
- Consistency rule:** Required where expenditures align to performance-based reporting initiatives.

Validation Rules

To ensure comparability:

- **Mandatory:** Fund, GL Account, Program, Source, Function, Object.
- **Conditional:** Grant, Grade Level, Curriculum, Accountability.
- **Operational Unit:** Required for site-based expenditures.
- **Combination Controls:** Certain dimensions must pair logically (e.g., “transfer” object only with “transfer” GL).

Crosswalks and Alignment

PBAM 2027 provides:

- **PBAM 2023 → PBAM 2027 Crosswalk** – to preserve historical comparability.
- **Oregon → NCES Crosswalk** – to align with federal surveys (F-33, NPEFS, SLFS).
- **Grant Codes → ALNs** – to simplify SEFA reporting.

Example of a Fully Coded Transaction

Scenario: A district purchases laptops for high school math classrooms using Title I funds.

Dimension	Code	Description
Fund	200	Special Revenue Fund
GL Account	7000	Expenditures
Program	3111	Schoolwide Program

Dimension	Code	Description
Source	403	Federal Sources
Function	100	Instruction
Object	2310	Technology hardware (<\$10k)
Grant	E262	Title I Grants to LEAs
Grade Level	301	High School
Operational Unit	XXX	Jefferson High School
Curriculum Area	130	Mathematics
Accountability	11	Skillful Instructional Practices

This coding ensures reconciliation at the district level, aggregation at the state level, and alignment with federal reporting.

District Application

All districts should:

- Implement PBAM 2027 coding for official records beginning July 1, 2026,
 - Ensure financial systems validate coding before posting,
 - Maintain local extensions only if they **map back to PBAM**,
 - Train staff on both **coding practice** and **reporting implications**.
-

Chapter 8: Cost Accounting and Program Reporting

Purpose

Oregon Education Agencies (EAs) are responsible for not only tracking fund, function, and object expenditures, but also reporting costs by **program** and **school site**. Cost accounting ensures that:

- Resources are allocated equitably,
- Compliance with **federal cost principles** ([2 CFR 200](#)) is maintained,
- Policymakers and the public can evaluate the **true cost of educational services**, and
- Financial data supports **performance and accountability reporting**.

Direct vs. Indirect Costs

Direct Costs

Costs that can be directly attributed to a program or activity.

Examples:

- Teacher salaries and benefits,
- Instructional supplies,
- Program-specific contracts.

Indirect Costs

Costs that benefit multiple programs and must be allocated.

Examples:

- District administration,
- Custodial and maintenance services,
- IT and network infrastructure.

Allocation Methodologies

Districts must apply consistent and rational allocation methods, such as:

- **Full-Time Equivalent (FTE) Teachers** – to allocate instructional support costs.
- **FTE Students** – to distribute student support services.
- **Square Footage** – to allocate facilities and operations costs.
- **Direct Usage** – when service records (e.g., transportation mileage, utility meters) exist.

Allocation methods should be documented in district policies and reviewed annually.

Federal Cost Principles

Under **Uniform Grant Guidance (2 CFR 200, Subpart E)**, costs must be:

- **Allowable** – necessary and reasonable for program purposes,
- **Allocable** – assignable to the benefiting program in proportion to benefit received,
- **Consistently treated** – not double-charged or misclassified,
- **Adequately documented** – supported by records such as payroll, purchase orders, or contracts.

Uniform Grant Guidance requires that subrecipient financial systems produce timely, accurate reports at the frequency required by the pass-through entity. ODE determines reporting frequency and uses a risk-based framework for monitoring. Districts must therefore maintain systems that can generate grant-level financial reports consistent with PBAM coding.

Program Cost Reporting

Oregon requires program cost reporting to support state accountability and federal reporting. A complete cost report should include:

1. **Direct Instruction Costs** – teacher salaries, instructional materials.
2. **School-Level Indirect Costs** – custodial, utilities, site administration.
3. **District-Level Indirect Costs** – central services, governance, IT.
4. **Program Revenues** – grants, state aid, fees.

Example – Title I Program Cost Report

Category	Amount	Basis of Allocation
Direct Instruction (Teachers)	\$450,000	Payroll records
Instructional Materials	\$40,000	Direct purchase
Custodial & Utilities	\$25,000	Square footage
Central Administration	\$35,000	% of student FTE
Total Program Costs	\$550,000	

Accountability Linkage

PBAM requires that program costs be linked to **Accountability Measures** (see Chapter 6). This ensures that expenditures can be analyzed not only by purpose, but also by their alignment with Oregon's educational goals:

- High-quality learning experiences,
- Equitable allocation of resources,
- Safe and inclusive schools,
- Engaged community partnerships.

District Checklist for Program Cost Reporting

- Identify direct program expenditures.
- Define indirect cost pools (administration, operations, IT).
- Apply documented allocation methods.
- Prepare school-level and program-level cost reports.
- Reconcile program costs with total expenditures in the general ledger.
- Report program costs as required by ODE and federal agencies.

Chapter 9: Activity Fund Management

Purpose

Activity funds are monies collected and spent for co-curricular and extracurricular purposes. Although smaller than operating budgets, they involve frequent cash handling and decentralized oversight, which makes them more vulnerable to errors or misuse. Proper management of these funds safeguards resources, ensures compliance with GASB requirements, and maintains public trust.

Types of Activity Funds

- **Student Activity Funds** – Belong to students, managed by student groups with staff oversight. Classified as fiduciary (custodial) funds under GASB 84. Examples: Student Council, Drama Club, National Honor Society.
 - **District Activity Funds** – Controlled by the district or board to support athletics, field trips, band, or other co-curricular programs. Classified as governmental funds (usually special revenue). Examples: Athletics, Book Fair, Music Concerts.
-

Internal Control Requirements

Because activity funds are decentralized, strong controls are essential. Districts must:

- Obtain board approval to establish each fund,
 - Separate duties for collection, deposit, and reconciliation,
 - Deposit all receipts intact and promptly into approved accounts,
 - Make disbursements only by pre-numbered checks supported by documentation,
 - Reconcile bank accounts monthly, with review by principals and the board,
 - Bond staff responsible for handling funds, and
 - Ensure activity funds are included in the district's annual audit.
-

Common Audit Issues

Despite policies, auditors frequently identify recurring issues, including:

- A single person collecting and approving funds,
- Cash receipts being used for direct payments ("cash box" disbursements),

- Inadequate documentation for fundraisers or trips,
 - Failure to reconcile activity funds to the district’s general ledger, and
 - Misclassification of activity funds between fiduciary and governmental.
-

Policies and Oversight

District boards should adopt written policies that:

- Define the purpose and scope of each activity fund,
 - Clarify oversight responsibilities for staff and students,
 - Prohibit improper use (personal purchases, loans, check-cashing),
 - Require board approval and documentation for fundraisers, and
 - Mandate annual reporting for each fund.
-

School-Level Practices

To ensure these policies are carried out consistently, schools should adopt the following practices:

- Maintain written authorization for each fund,
 - Issue pre-numbered receipts for all collections,
 - Deposit funds daily when practical,
 - Reconcile bank statements monthly,
 - Require two signatures on checks,
 - Submit monthly activity fund reports to the district office, and
 - Confirm inclusion of funds in the district’s annual audit.
-

GASB 84 Classification

[GASB 84 Link](#)

Districts must evaluate whether activity funds are:

- **Fiduciary (Custodial)** – Funds held for students and not available for district operations, or

- **Governmental (Special Revenue)** – Funds directed and controlled by the district.

Accurate classification is essential to ensure financial statements properly reflect ownership, accountability, and control of resources.

Appendices

Appendix A – Key definitions, acronyms, and abbreviations

Accountability Measure (Dimension)

A reporting code used to link budgeted and actual expenditures to performance/accountability metrics (e.g., grade-level learning outcomes, instructional practice indicators).

Accounting System

The methods and records used to identify, assemble, analyze, classify, record, and report a government's transactions and to maintain accountability for related assets and liabilities.

Accounts Payable

A short-term liability for amounts owed for goods and services received but not yet paid.

Accounts Receivable

An asset for amounts due for goods and services provided but not yet collected (excludes due from other funds/governments unless specifically recorded as such).

Accrual Basis

Recognizes revenues when earned and expenses when incurred, regardless of cash timing. Used in government-wide statements under GASB.

Accumulated Depreciation

A contra-asset account that records the total depreciation recognized on a capital asset to date.

Actuarial Basis

A method for computing periodic contributions so that contributions plus compounded earnings will fund required payments (e.g., pensions), considering time and assumed rates of return.

Activity (Dimension / Tracking Field)

(Optional) A code to track specific services or events (e.g., athletics, clubs, field trips). Useful for co-/extra-curricular tracking beneath programs/functions.

Ad Valorem Tax

A tax based on assessed value (e.g., property tax).

Allot

To divide an appropriation into smaller amounts available to encumber or expend during defined periods.

Appropriation

Legal authority granted by the governing body to incur obligations and make expenditures for specified purposes, within stated amounts and timeframes.

Arbitrage

Earning higher taxable investment returns on proceeds of tax-exempt debt than the interest cost on that debt (subject to federal restrictions and rebate rules).

Assistance Listing Number (ALN) / CFDA

The federal program identifier (formerly CFDA). Used for SEFA reporting and grant identification (e.g., 84.010 Title I, Part A).

Basis of Accounting

Refers to the timing of recognition for revenues/expenditures/expenses and related assets/liabilities (e.g., accrual, modified accrual, cash, modified cash).

Budget

The financial plan for a period that estimates resources and authorizes spending (typically for a fiscal year).

Budget Document

The instrument presenting the proposed budget, supporting schedules, and draft legal measures needed to enact it.

Budget Message

A written narrative from budget leadership explaining major items, assumptions, trends, and policy recommendations.

Budgetary Basis

The basis used to prepare and monitor the legally adopted budget (may differ from GAAP—for example, by excluding accruals or encumbrances).

Budgetary Control

Managing operations in accordance with the adopted budget to keep spending within available appropriations and expected revenues.

Deferred Inflows of Resources

Acquisitions of net assets applicable to future periods (e.g., property taxes not yet “available,” certain pension items).

Deferred Outflows of Resources

Consumptions of net assets applicable to future periods (e.g., certain pension/OPEB items).

Encumbrance

A reservation of budget authority for a commitment (e.g., purchase order, contract) before goods/services are received. Helps prevent overspending.

Expenditures

Decreases in net financial resources of governmental funds (e.g., current operations, capital outlay, debt service), recognized primarily when liabilities are incurred under modified accrual.

Function (Dimension)

The purpose of an activity/cost (e.g., instruction, student support services, administration, operations). PBAM uses this to indicate the broad operational objective.

Fund (Dimension)

A fiscal and accounting entity with a self-balancing set of accounts, established to carry out specific activities or meet certain objectives under special regulations/restrictions (e.g., General, Special Revenue, Debt Service, Capital Projects, Proprietary, Fiduciary).

Fund Balance (Governmental Funds)

The difference between assets and liabilities, classified per GASB 54 as Nonspendable, Restricted, Committed, Assigned, and Unassigned (the latter only in the General Fund).

Grant / Project (Dimension)

An identifier tying revenues/expenditures to a specific award or project to support budgeting, compliance (including ALN and award year), reporting, and monitoring.

Indirect Costs

Allowable shared/overhead costs that cannot be readily assigned to a single program/grant but may be recovered via an approved indirect cost rate (per UGG).

Location / Responsibility Center (Dimension)

(Optional) Identifies the school, site, department, or office accountable for a transaction (i.e., the operational unit/responsibility center).

Measurement Focus

Determines which assets/liabilities are reported and whether operating statements present flows of current financial resources (governmental funds) or economic resources (government-wide/proprietary/fiduciary).

Modified Accrual Basis

Recognizes revenues when measurable and available to finance current-period outflows; recognizes expenditures when the related fund liability is incurred (with specified exceptions). Used by governmental funds.

Modified Cash Basis

A non-GAAP hybrid that primarily recognizes transactions on a cash basis with limited accrual-like adjustments (e.g., for payroll, debt service). Often used for statutory/budgetary reporting; not GAAP for external financial statements.

Object (Dimension)

Classifies the type of item or service purchased (e.g., salaries, benefits, professional services, supplies, capital outlay).

Prepaid Expenditures

Payments made in advance of receiving goods or services; recorded as assets until benefits are realized.

Program (Dimension)

A plan of activities to accomplish specific objectives (e.g., Special Education—School Age; Career & Technical Education; Child Nutrition). Distinct from Function (purpose) and Object (type of cost).

Revenues

Increases in net resources (governmental funds) other than other financing sources; recognized under modified accrual when measurable and available.

Schedule of Expenditures of Federal Awards (SEFA)

The annual schedule required for Single Audit reporting that lists federal awards expended during the fiscal year by program/ALN and amount.

Uniform Grant Guidance (UGG) – 2 CFR 200

Federal rules for administrative requirements, cost principles, and audit requirements for non-federal entities receiving federal awards (includes allowability, procurement, subrecipient monitoring, SEFA/audit).

Annual Comprehensive Financial Report (ACFR)

A government’s comprehensive annual financial report prepared in conformity with GAAP, including government-wide and fund financial statements with notes, RSI, and statistical sections. (Terminology updated from the former “CAFR.”)

Appendix B – PBAM 2023 to PBAM 2027 Crosswalk - Main Oregon chart to new structure mapping.

Provides a mapping of old codes to new codes.

- Fund codes (old → new).
- Program and object reclassifications.
- Any deleted/merged codes flagged.

(This appendix helps districts migrate systems smoothly.)

Appendix C – Oregon to NCES Crosswalk – Mapping for federal comparability.

Aligns PBAM codes with NCES reporting categories for:

- F-33 LEA Finance Survey,

- NPEFS National Public Education Financial Survey,
- SLFS School-Level Finance Survey.

This ensures Oregon data is compatible with federal reporting requirements.

Appendix D – Budget Forms & Journal Entries – Combined section for practical accounting applications.

[Appendix D Example Journal Entries](#)

Sample forms for district use:

- [ED-1 Notice of Budget Hearing \(ORS 294.448\)](#).
- [ED-50 Notice of Property Tax Levy](#).
- [Budget resolution templates](#).
- Budget-to-Actual report sample format.

Appendix E – Internal Controls & Month-End Close – Combines former F & H for a single operational control reference.

[Month End Close Schedule 2027](#)

Illustrates common transactions for both modified accrual and accrual basis:

- Property tax revenue recognition.
- Capital asset purchase and depreciation.
- Lease recognition under [GASB 87](#).
- Grant revenue recognition and expenditure.

Sample tools districts can adopt, including:

- [Cash handling checklist](#)
- [Purchasing and procurement controls](#).
- [Activity fund oversight checklist](#).
- [Year-end closing checklist](#).

Appendix F – Federal & Special Program Guidance

- [Oregon Revised Statutes \(ORS 294, ORS 327, ORS 327.511\)](#).
- [Oregon Administrative Rules relevant to budgeting and reporting](#).
- [Governmental Accounting Standards Board \(GASB\) standards](#).
- [NCES Financial Accounting Handbook](#).

- [Uniform Grant Guidance \(2 CFR 200\)](#).
- **Every Student Succeeds Act (ESSA) Programs**
- [English Learner \(ELL\) and Non-ELL Expenditures](#)
- [Student Body Funds](#)
- **Compliance and Monitoring**
- [Sources of Accounting and Budget Information](#)

DRAFT

Oregon Department of Education

Chapter 581

Division 23

SCHOOL FINANCE

581-023-0035

Budgeting and Accounting for Schools

Rules governing the budgeting and accounting systems for schools and the school systems of accounts are contained in Chapter 2 of the Program Budgeting and Accounting Manual, published by the Oregon Department of Education. The State Board of Education adopts this publication to govern budgeting and accounting systems for schools.

[Publications: Publications referenced are available from the agency.]

Statutory/Other Authority: ORS 326.051 & 327.125

Statutes/Other Implemented: ORS 294.356 & 327.125

History:

ODE 5-2008, f. & cert. ef. 2-22-08

ODE 2-2007, f. & cert. ef. 1-26-07

ODE 3-2003, f. & cert. ef. 3-10-03

ODE 5-2001, f. & cert. ef. 1-29-01

ODE 5-1999, f. & cert. ef. 1-12-99

EB 12-1987, f. & ef. 7-10-87

1EB 27-1980, f. & ef. 11-7-80

1EB 23-1980(Temp), f. & ef. 9-2-80

1EB 234, f. & ef. 6-18-76

1EB 163, f. 2-20-74, ef. 3-15-74

Summary

Meeting Date: 10/16/2025

Title: Program and Budgeting Manual Rule Amendment

Status: First Reading

Presentation: Yes

Key Staff: Devyn Castillo and Hannah Sullivan

Topic Summary: The Oregon Department of Education is interested in updating the 2023 Program and Budgeting Manual and Chart of Accounts to improve data quality and reduce reporting burden. To do so, the State Board of Education formally amend the rule to incorporate the new version. The current rule is tied to the current version of the manual.

ODE Education Equity

Stance

Education equity is the equitable implementation of policy, practices, procedures, and legislation that translates into resource allocation, education rigor, and opportunities for historically and currently marginalized youth, students, and families including civil rights protected classes. This means the restructuring and dismantling of systems and institutions that create the dichotomy of beneficiaries and the oppressed and marginalized.

BACKGROUND AND NEED

Members of the State Board of Education are volunteers, with unique professional and lived experiences. Using plain language, this section should provide context for this item, including any needed overviews of relevant programs or initiatives.

- 1. Briefly, how does this topic, program, or initiative currently operate? Where is it located within Oregon’s school systems? How does it ultimately serve students?**

The Program Budgeting and Accounting Manual provides accounting and budget guidance to education agencies in Oregon as well as a system to code their financial data. This data is then submitted to ODE and used to inform State School Fund payments and other compliance processes. Prior to this revision, the manual ODE has only made somewhat small annual updates, with its last revision for enacted in FY24. The rule governing the Program Budgeting and Accounting Manual is tied to the specific manual it was enacted for. To make changes, the board must formally amend the rule to incorporate the new version of the manual.

- 2. Please list the specific rule(s), statute(s), or recently passed legislation that allows the Board to take action on this item. Where are they prescriptive and where do they provide the Board and Department flexibility?**

ORS 327.511 – Uniform Budgeting and Accounting System

Oregon State Board of Education Docket



(1) The State Board of Education shall adopt by rule a uniform budget and accounting system for school districts and education service districts.

(2) The uniform budget and accounting system shall include uniform definitions for a chart of accounts that shall allow for valid comparisons of expenditures among schools and among districts. The uniform definitions for the chart of accounts shall be developed by the Department of Education in consultation with the Legislative Revenue Officer, the Legislative Fiscal Officer, the Oregon Department of Administrative Services and appropriate organizations that represent kindergarten through grade 12 educational interests.

(3) The uniform budget and accounting system shall allow for the gathering of data on separate functions and programs, including but not limited to:

- a) Individual school;
- b) Grade level;
- c) Curriculum area;
- d) Class size; **and**
- e) Extracurricular activities.

(4) The Department of Education shall place data gathered from the uniform budget and accounting system in a database that includes information that is accessible by the public through the Internet, a personal computer or other similar technology. [1997 c.616 §1]

OAR 581-023-0035 – Budgeting and Accounting for Schools

Rules governing the budgeting and accounting systems for schools and the school systems of accounts are contained in Chapter 2 of the Program Budgeting and Accounting Manual, published by the Oregon Department of Education. The State Board of Education adopts this publication to govern budgeting and accounting systems for schools.

3. Has this item come before the Board before? If so, when did the Board last take action, and what was that action?

The board has participated in a similar process related to this manual. At least bi-annually the board has approved updates to the Program Budgeting and Accounting Manual. The most recent update to the manual was approved to go into effect in FY24.

4. Why is this item coming before the Board now?

ODE has a strong interest in reducing reporting burden with districts as well as improving accountability. The updated chart of accounts and expanded accounting and budgeting guidance in the Program Budgeting and Accounting Manual work to accomplish those two goals.

5. Who requested or brought about the need for this item? (Select all that apply.)

Oregon State Board of Education Docket



- ODE Staff
- Students
- Families
- Community-Based Organizations
- Culturally Specific Organizations
- School Districts
- Education Service Districts
- Charter Schools
- Oregon State Legislature
- Educational Associations
- Racial Justice Council
- Federal Government
- One or more of Oregon’s nine federally recognized tribes: _____
- Other: _____

ENGAGEMENT STRATEGY AND LEARNINGS

The State Board of Education expects all items that come before it be reviewed and influenced, to the greatest extent possible, by a robust community engagement process. Using plain language, this section should provide an overview of the role that engagement played in this item, including with Oregon’s nine federally recognized Tribes, other state agencies, and external partners.

6. How did the [Equity Decision Tree](#) inform your office/team engagement strategy? Who is most likely to be affected and how have they been intentionally incorporated into the engagement process for this item?

School districts are most likely to be affected by the change as well as ODE internal systems. We are working through an open comment period (10/10/25 – 12/1/2025) to allow districts, interested parties, and the public to provide feedback in multiple different formats. We have also instituted a Chart of Accounts Committee that is meeting bi-weekly to review changes.

7. After consulting with ODE’s Rules Coordinator and the Office of Indian Education, did this item require Tribal Consultation and/or Tribal Communication with Oregon’s nine federally recognized tribes? (For more information, please reference ODE’s [Tribal Consultation Toolkit](#).)

- No
- Yes – Both Consultation and Communication.
- Yes – Only Communication.

8. Has your office/team considered how this item intersects with the authority of other state entities that serve the health and education needs of Oregon’s students, or otherwise contribute to the climate of Oregon’s school systems? If so, please select from the below list.

- N/A; this item does not intersect with other state entities.

Oregon State Board of Education Docket



- Oregon Health Authority (OHA)
- Department of Early Learning and Care (DELIC; formerly ELD)
- Educator Advancement Council (EAC)
- Higher Education Coordinating Commission (HECC)
- Youth Development Oregon (YDO)
- Teacher Standards and Practices Commission (TSPC)
- Oregon Housing and Community Services (OHCS)
- Other: _____

If you selected any of the above entities, please share why they were involved, how the Department partnered with them, and what feedback they provided.

Please enter your answer here

9. Which geographic perspectives are intentionally represented in your office/team engagement strategy?

- Northeast Oregon
- Central and Southeast Oregon
- Southwest Oregon
- Willamette Valley and Central Coast
- Northwest Oregon
- Tribal lands
- Other: _____

Why did your office/team focus on the above geographical perspective(s)?

This will impact all of the selected geographical perspectives.

10. Please highlight some of the key pieces of feedback your office/team received during the engagement process. How did this feedback influence the development of this item? How were differences in opinion accounted for?

We have just opened the comment period, so we are still actively accepting and considering feedback that we will incorporate into the development.

11. Please describe any additional engagement opportunities your office/team will be pursuing prior to asking the Board to take action on this item.

Here are the engagement opportunities:

- Public/district open comment period
- Chart of Accounts Committee

Oregon State Board of Education Docket

- Direct outreach to districts
- Direct outreach to auditors
- Direct outreach to ODE internal staff

FISCAL AND ADMINISTRATIVE IMPACT ANALYSIS

Equitable resource allocation is a critical component of education equity. Using plain language, this section should describe the fiscal, administrative, and small business impacts of this item, and how it affects the larger social system that serves Oregon's students.

12. After consulting with ODE's Rules Coordinator and Grant Consolidation Team, was this item identified as a grant-related item?

- No
 Yes; please review Appendix B: Grant Consolidation below.

13. Will Board action create fiscal or administrative impacts on districts, ESDs, community-based organizations, and/or the nine federally recognized tribes? If so, please describe the anticipated short- and long-term effects and how they may be felt differently in small, rural, or remote communities.

The amendment of the rule itself does not create a direct fiscal impact. However, implementation of the updated Program Budgeting and Accounting Manual (PBAM) may result in initial local costs as districts update their accounting systems, internal procedures, and staff training to align with the revised chart of accounts and reporting structure. These impacts are expected to be temporary and offset over time by improved consistency, reduced reporting burden, and greater efficiency in financial data management and state reporting. ODE is also working directly with software companies and planning on supporting small, rural districts in their adoption of the new manual by creating crosswalks and supporting system integration.

14. Will Board action create a fiscal or administrative impact on state agencies, units of local government, and/or the public? Will it increase costs associated with compliance for small businesses?

There will be some administrative impact to ODE to support the adoption of the new chart of accounts, but no other impact to the other parties listed.

EQUITY IMPACT ANALYSIS

The State Board of Education envisions an aspirational education system that honors its increasingly diverse student body and affirms every student to reach their full potential in a rapidly shifting global environment. Using plain language, this section should describe the impact of this item on students and the larger social system that serves their health and education needs.

15. How will Board action on this item ultimately impact students and their families, particularly those who have been and continue to be systemically marginalized?

This action will work to improve the financial data we have available about school districts, which will support better resource allocation.

16. How will Board action on this item ultimately impact school district employees and volunteers, particularly those who have been and continue to be systemically marginalized?

There will be some initial startup costs to implementing this chart of accounts, however we estimate that that cost will be mitigated by the reduction in reporting burden. No additional estimated impact on systematically marginalized employees.

17. What are the anticipated short- and long-term consequences of Board action on this item? Will Board action have a cumulative effect on students, families, educators, districts, or Oregon's school systems?

As previously mentioned, some startup costs to implement the new chart of accounts however the benefits include reduction in reporting burden and improved data quality and comprehensiveness to improve accountability, compliance, and resource allocation.

18. What are the anticipated short- and long-term consequences of inaction on this item and who would experience those consequences?

Inaction on this item leaves districts with an unsustainable reporting burden and leaves ODE out of compliance with federal reporting requirements.

RECOMMENDED ACTION

The State Board of Education has dedicated itself to challenging the status quo and sharing responsibility for every student's academic and lifelong success. Using plain language, this section should describe the choice before the Board, the Department's recommendation, and any other relevant information.

19. Please provide a brief summary of the specific language your office/team is bringing to the Board. Are there any key decisions within this language that your office/team would like the Board to make?

The Department is not recommending any changes to the language of OAR 581-023-0035 itself. Reapproval of these rules will instead allow the most recent version of ODE's Programing Budgeting Manual to be revised.

20. How is this language responsive to identified needs and/or feedback received through the engagement process? How is it in alignment with the Board's Mission, Vision, and Values?

The language itself is a carryforward of a prior rule, the implementation process has gone and is going through extensive engagement.

21. Please describe the action your office/team is recommending to the Board (for example, the adoption of rules or the approval of a waiver) and how it reflects the Department’s commitment to academic excellence, belonging and wellness, and reimagining accountability.

Rule amendment to ensure that the rule is associated with the current Program Budgeting and Accounting Manual update.

22. Please note any additional support the Department is (or will be) providing to ensure successful implementation of this item.

- N/A; this item does not require any additional support.
- Communications plan
- Technical assistance, professional development, and/or coaching
- Direct or differentiated support for small, rural, or remote school districts
- Corrective Action Processes
- Safety measures
- Organizational culture or practice changes (change management)
- Materials and/or supplies
- Guidance and/or supplemental resources
- Other: Working directly with software companies

23. Has this item changed since the last Board meeting?

- N/A; this item has not previously been before the Board
- No; same as last month
- Yes; please review Appendix A: Second Reading below.

Dimension	Level	PBAM 2024 Code
Area of Responsibility	1	20
Area of Responsibility	1	60
Area of Responsibility	1	340
Area of Responsibility	1	50
Area of Responsibility	1	270
Area of Responsibility	1	280
Area of Responsibility	1	320
Area of Responsibility	1	310
Area of Responsibility	1	90
Area of Responsibility	1	250
Area of Responsibility	1	290
Area of Responsibility	1	350
Area of Responsibility	1	0
Area of Responsibility	1	10
Area of Responsibility	1	260
Area of Responsibility	1	500
Area of Responsibility	1	560
Area of Responsibility	1	550
Area of Responsibility	1	540
Area of Responsibility	1	530
Area of Responsibility	1	520
Area of Responsibility	1	230
Area of Responsibility	1	170
Area of Responsibility	1	190
Area of Responsibility	1	200
Area of Responsibility	1	130
Area of Responsibility	1	210
Area of Responsibility	1	180
Area of Responsibility	1	120
Area of Responsibility	1	110
Area of Responsibility	1	100
Area of Responsibility	1	510
Area of Responsibility	1	570
Area of Responsibility	1	580
Area of Responsibility	1	590
Function	4	1292
Function	3	1280
Function	4	1271
Function	4	2115
Function	4	1294
Function	4	2117
Function	4	2558
Function	4	1223

Function	4	1221
Function	3	1250
Function	3	1220
Function	3	1460
Function	3	1210
Function	4	1281
Function	4	1295
Function	4	1227
Function	4	1222
Function	3	1260
Function	2	1400
Function	4	1293
Function	3	1270
Function	4	1122
Function	2	1300
Function	4	1272
Function	3	4190
Function	3	2520
Function	2	2700
Function	3	1140
Function	4	1131
Function	4	1121
Function	4	1111
Function	2	5300
Function	2	5400
Function	3	5120
Function	3	5110
Function	3	4180
Function	3	4150
Function	3	4120
Function	3	4110
Function	3	3390
Function	3	3370
Function	3	3360
Function	3	3340
Function	3	3330
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Function	3	3310
Function	3	3130
Function	3	3120
Function	3	3110
Function	4	2551
Function	4	2541
Function	4	2661

Function	4	2641
Function	4	2631
Function	4	2621
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Function	4	2321
Function	3	2220
Function	3	2210
Function	3	2150
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Function	3	2130
Function	3	2120
Function	3	2110
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Function	2	3300
Function	2	3200
Function	2	3100
Function	3	2570
Function	3	2560
Function	3	2550
Function	3	2540
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Function	3	2670
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Function	3	2190
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Function	3	2240
Function	3	2230
Function	2	2100
Function	1	5000
Function	1	4000
Function	1	3000
Function	1	2000
Function	1	1000
Function	4	1113

Function	1	7000
Function	1	6000
Function	4	1291
Function	2	1100
Function	4	1132
Function	4	1299
Function	2	2160
Function	3	2680
Function	3	2690
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Function	4	2649
Function	4	2662
Function	4	2663
Function	4	2664
Function	4	2669
Function	3	3190
Function	3	6110
GAAP Fund	2	201
GAAP Fund	3	252
GAAP Fund	3	251
GAAP Fund	1	500
GAAP Fund	1	600
GAAP Fund	1	400
GAAP Fund	1	300
GAAP Fund	1	200
GAAP Fund	1	100
GAAP Fund	1	700
GAAP Fund	2	250
GAAP Fund	2	299
GL	2	131
GL	2	152
GL	2	172
GL	2	423
GL	2	431
GL	2	433
GL	2	441
GL	2	402
GL	2	721
GL	2	303
GL	2	590
GL	2	432
GL	2	191
GL	2	422
GL	2	541
GL	2	531

GL	2	511
GL	2	499
GL	2	492
GL	2	411
GL	2	401
GL	2	442
GL	2	461
GL	2	455
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GL	2	141
GL	2	122
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GL	2	701
GL	2	103
GL	2	104
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GL	2	101
GL	2	770
GL	2	764
GL	2	763
GL	2	762
GL	2	761
GL	2	231
GL	2	106
GL	2	481
GL	1	500
GL	1	400

GL	1	200
GL	1	100
GL	2	602
GL	2	302
GL	1	700
GL	2	601
GL	2	301
GL	1	300
GL	2	451
GL	2	421
GL	2	491
GL	2	161
GL	2	115
GL	2	113
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GL	2	740
GL	2	760
GL	2	112
GL	2	443
GL	2	471
GL	2	603
GL	2	521
Object	2	390
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Object	2	530
Object	2	622
Object	2	372
Object	2	371
Object	2	373
Object	2	230
Object	2	360
Object	2	374
Object	2	790
Object	1	800
Object	2	110
Object	3	312
Object	3	316
Object	3	317
Object	3	318
Object	3	319
Object	3	328
Object	3	329
Object	3	334
Object	3	343

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Object	2	370
Object	3	383
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Object	3	386
Object	3	387
Object	3	388
Object	3	389
Object	3	541
Object	3	542
Object	3	659
Object	3	669
Object	2	810
Object	3	654
Object	3	652
Object	3	653
Object	3	651
Object	2	630
Object	2	670
Object	3	655
Object	2	660
Object	3	663
Object	2	550
Object	2	564
Object	3	664
Object	2	562
Object	3	662
Object	2	510
Object	2	450
Object	2	460
Object	2	410
Object	2	470
Object	3	665
Object	2	440
Object	2	430
Object	2	420
Object	1	400
Object	3	333

Object	3	332
Object	3	342
Object	3	341
Object	2	350
Object	3	327
Object	3	326
Object	3	324
Object	3	324
Object	3	321
Object	3	382
Object	3	381
Object	2	380
Object	3	311
Object	2	240
Object	2	116
Object	3	232
Object	3	231
Object	3	212
Object	3	216
Object	3	211
Object	2	117
Object	2	115
Object	2	130
Object	2	124
Object	2	123
Object	2	122
Object	2	121
Object	2	113
Object	2	114
Object	3	331
Object	2	610
Object	3	621
Object	2	720
Object	2	650
Object	2	640
Object	2	590
Object	2	540
Object	2	520
Object	2	480
Object	2	340
Object	3	322
Object	2	320
Object	2	310
Object	2	270

Object	2	220
Object	2	210
Object	2	
Object	2	120
Object	2	112
Object	2	111
Object	2	690
Object	2	330
Object	1	700
Object	1	600
Object	1	500
Object	3	313
Object	1	300
Object	1	200
Object	1	100
Object	2	680
Object	2	710
Object	2	820
Object	3	213
Object	3	214
Object	3	215
Object	2	560
Source	4	1114
Source	4	4899
Source	4	1115
Source	3	1330
Source	3	1420
Source	3	1980
Source	3	2110
Source	4	2199
Source	4	3299
Source	2	3800
Source	4	4501
Source	4	4502
Source	2	4900
Source	4	1113
Source	3	1310
Source	4	1321
Source	4	1322
Source	4	1323
Source	4	1324
Source	4	1331
Source	4	1332
Source	4	1333

Source	2	1400
Source	3	1410
Source	4	1421
Source	4	1422
Source	4	1423
Source	3	1620
Source	3	1710
Source	3	1740
Source	3	1750
Source	3	1760
Source	3	1790
Source	4	1941
Source	4	1942
Source	4	1943
Source	4	1951
Source	2	4800
Source	3	1990
Source	2	4700
Source	2	4500
Source	2	4300
Source	2	4200
Source	2	4100
Source	1	2000
Source	1	1000
Source	1	4000
Source	1	3000
Source	2	5300
Source	4	4803
Source	4	4802
Source	4	4801
Source	4	3199
Source	4	4202
Source	4	4201
Source	4	3104
Source	4	3103
Source	4	3106
Source	4	3102
Source	4	3101
Source	2	2900
Source	4	2105
Source	4	2103
Source	4	2102
Source	4	2101
Source	3	1960

Source	3	1970
Source	3	1950
Source	3	1930
Source	4	3204
Source	2	3900
Source	4	1413
Source	4	1412
Source	4	1411
Source	3	1320
Source	4	1313
Source	4	1312
Source	4	1311
Source	2	1200
Source	4	1123
Source	3	1130
Source	4	1122
Source	4	1121
Source	4	1112
Source	4	1111
Source	2	5400
Source	2	2800
Source	2	2200
Source	2	1500
Source	3	1940
Source	3	1920
Source	3	1910
Source	2	1600
Source	2	1800
Source	2	1700
Source	2	1300
Source	3	1190
Source	3	1120
Source	3	1110
Source	2	5100
Source	2	1100
Source	1	5000
Source	4	3222
Source	2	5200
Source	3	1510
Source	3	1530
Source	3	1610
Source	4	1611
Source	4	1612
Source	4	1613

Source	3	1630
Source	3	1720
Source	3	1730
Source	2	1900
Source	2	2100
Source	4	2111
Source	4	2112
Source	4	2113
Source	2	3100
Source	2	3200
Source	3	5110
Source	3	5120
Source	3	5130
Source	3	5140
Source	3	5150
Source	3	5160

PBAM 2024 Name
Tutoring
Core Areas/Block Classes
Coordinating Early Intervening Services (CEIS)
General Classroom Instruction
Career Related Learning
English Language Learner (ELL) Programs
Special Education
Non-Instructional Staff Development
Other Pre-kindergarten Programs
Other Extracurricular Student Activities
Other Programs
School Improvement Fund Grant
No Area code assigned
Home Instruction
Technology
General Professional, Technical Strands
Natural Resources Systems
Industrial and Engineering Systems
Human Resources
Health Services
Business and Management
Athletics
Driver Education
Health Education
Physical Education
The Arts
Second Language
Mathematics
Science
Social Studies
English
Arts and Communication
Other Professional, Technical Strands
Other Professional, Technical Strands
Other Professional, Technical Strands
Teen Parent Programs
Alternative Education
Remediation
Student Safety
Youth Corrections Education
Identification and Recruitment of Migrant Children
Special Education Transportation Services
Community Transition Centers

Learning Centers - Structured and Intensive
Less Restrictive Programs for Students with Disabilities
Restrictive Programs for Students with Disabilities
Special Programs, Summer School.
Programs for the Talented and Gifted
Public Alternative Programs
English Language Learner (ELL) 2
Extended School Year Programs
Developmental Kindergarten
Treatment and Habilitation
Summer School Programs
Migrant Education
Educationally Disadvantaged
Middle/Junior High School Extracurricular
Adult/Continuing Education Programs
Title IA/D
Other Facilities Construction Services
Fiscal Services
Supplemental Retirement Program
Pre-kindergarten Programs
High School Programs
Middle/Junior High Programs
Elementary, K-5 or K-6
Apportionment of Funds by ESD or LEA
PERS UAL Bond Lump Sum Payment to PERS
Short-Term Debt Retirement
Long-Term Debt Service
Other Capital Items
Building Acquisition, Construction, and Improvement Services
Site Acquisition and Development Services
Service Area Direction
Other Community Services
Nonpublic School Students Services
Welfare Activities Services
Public Library Services
Civic Services
Community Recreation Services
Direction of Community Services Activities
Food Delivery Services
Food Preparation & Dispensing
Service Area Direction (Food)
Service Area Direction (Transportation)
Service Area Direction (O&M)
Service Area Direction (Technology)

Service Area Direction (Staff)
Service Area Direction (Information)
Service Area Direction (PRDE)
Support Services Business
Office of the Superintendent Services
Educational Media Services
Improvement of Instruction Services
Speech Pathology and Audiology Services
Psychological Services
Health Services
Guidance Services
Attendance and Social Work Services
Transfers of Funds
Debt Service
Custody and Care of Children Services
Community Services
Other Enterprise Services
Food Services
Internal Services
Alternative Transportation (2023 HB 3014)
Student Transportation Services
Operation and Maintenance of Plant Services
Direction of Business Support Services
Records Management Services
Technology Services
Staff Services
Information Services
Planning, Research, Development, Evaluation Services, Grant Writing, and Statistical Services
Direction of Central Support Services
Support Services Central Activities
Other Support Services—School Administration
Office of the Principal Services
Service Direction, Student Support Services
Executive Administration Services
Board of Education Services
Instructional Staff Development
Assessment and Testing
Support Services-Students
Other Uses
Facilities Acquisition and Construction
Enterprise and Community Services
Support Services
Instruction
Elementary Extracurricular

Unappropriated Ending Fund Balance
Contingencies (For Budget Only)
English Language Learner (ELL)
Regular Programs
High School Extracurricular
Other Programs
Other Student Treatment Services
Interpretation and Translation Services
Other Support Services — Central
Special Programs
Life Skills with Nursing
Out of District Programs
Home Instruction
Diagnostic Classrooms
Other
Private Alternative Programs
District Alternative Programs
Charter Schools
Other Alternative Programs
Designated Programs
Elementary
Middle/Junior High
High School
Other Summer School Programs.
Service Area Direction
Attendance Services
Social Work Services
Student Accounting Services
Other Attendance and Social Work Services
Service Area Direction
Counseling Services
Appraisal Services
Information Services
Placement Services
Other Guidance Services
Service Area Direction
Medical Services
Dental Services
Nurse Services
Other Health Services
Service Area Direction (Psychological)
Psychological Testing Services
Psychological Counseling Services
Psychotherapy Services

Other Psychological Services
Service Area Direction (Speech/Aud)
Speech Pathology Services
Audiology Services
Other Speech Pathology & Audiology Services
Support Services Instructional Staff
Service Area Direction (Improvement of Instruction)
Curriculum Development
Other Improvement of Instruction
Service Area Direction (Media)
Library/Media Center
Multimedia Services
Educational Television Services
Other Educational Media Services
Support Services
State and Federal Relations Services
Other Executive Administration Services
Service Area Direction (Fiscal)
Budgeting Services
Receiving & Disbursing Funds
Payroll Services
Financial Accounting Services
Internal Auditing Services
Property Accounting Services
Risk Management Services
Other Fiscal Services
Care & Upkeep of Buildings
Care & Upkeep of Grounds
Maintenance
Security Services
Other O&M Services
Vehicle Operation Services
Other Student Transportation Services
Service Area Direction (Internal Services)
Purchasing Services
Warehousing & Distributing Services
Printing, Publishing, Duplicating
Other Internal Services
Development Services
Evaluation Services
Planning Services
Research Services
Grant Writing
Statistical Services

Fundraising/Resource Development
Other PRDE Services
Internal Information Services
Public Information Services
Management Information Services
Other Information Services
Recruitment & Placement Services
Staff Accounting Services
Health Services (Employees)
Other Staff Services
Systems Analysis Services
Programming Services
Operations Services
Other Technology Services
Other Food Services
Operating Contingency
Federal Revenue Sources and Expenditures.
Measure 98: High School Success
Student Investment Account.
Enterprise Funds
Internal Service Funds
Capital Projects Funds
Debt Service Funds
Special Revenue Fund
General Fund
Trust and Agency Funds
State, Local, and Other Revenue Sources and Expenditures.
Child Nutrition Programs – Food Service Sources and Expenditures.
Interfund Loans Receivable
Estimated Uncollectible Loans
Inventories for Resale
Warrants Payable
Contracts Payable
Construction Contracts Payable
Matured Bonds Payable
Interfund Accounts Payable
Contributed Capital
Amount Available in Debt Service Funds
Other Long-Term Liabilities
Construction Contracts Payable-Retained Percentage
Deposits
Judgments Payable
Unfunded Pension Liabilities
Lease Obligations

Bonds Payable
Other Current Liabilities
Due to Fiscal Agent
Intergovernmental Accounts Payable
Interfund Loans Payable
Bonds Payable
Accrued Salaries and Benefits
Interest Payable
Accumulated Depreciation on Machinery and Equipment
Accumulated Depreciation on Site Improvements
Accumulated Depreciation on Buildings and Building Improvements
Machinery and Equipment
Construction in Progress
Site Improvements
Sites
Amount to Be Provided for Retirement of General Long-Term Debt
Other Accounts Receivable
Estimated Uncollectible Accounts Receivable
Loans Receivable
Investments
Other Current Assets
Prepaid Expenses
Inventories for Consumption
Interfund Accounts Receivable
Intergovernmental Accounts Receivable
Estimated Uncollectible Taxes (Credit)
Interest Receivable on Investments
Taxes Receivable
Investment in General Fixed Assets
Petty Cash
Change Cash
Cash with Fiscal Agents
Cash on Hand
Cash in the Bank
Unassigned Fund Balance
Assigned Fund Balance
Committed Fund Balance
Restricted Fund Balance
Non-spendable Fund Balance
Buildings and Building Improvements
Cash and Investments to Repay Short-term Notes
Deferred Revenues
Long-Term Liabilities
Current Liabilities

Fixed Assets
Current Assets
Expenditures
Revenues
Fund Equity
Appropriations (Budget Account)
Estimated Revenues (Budget Account)
Budgeting Accounts and Other Debits
Loans Payable
Accounts Payable
Deposits Payable
Bond Proceeds Receivable
Accrued Interest on Investments Purchased
Unamortized Documents on Investments (Credit)
Reserve for (Special Purposes) - Retained Earnings
Unreserved Retained Earnings
Other than Unassigned (Special Purposes)—Fund Balance.
Unamortized Premiums on Investments
Unamortized Premiums on Bonds Sold
Payroll Deductions and Withholdings
Encumbrances
Loans Payable
Other General Professional and Technological Services
Interest.
Improvements Other Than Buildings
Bus Garage, Bus, and Capital Bus Improvement Interest
Tuition Payments to Other Districts Outside the State
Tuition Payments to Other Districts Within the State
Tuition Payments to Private Schools
Other Required Payroll Costs
Charter School Payments
Other Tuition
Other Transfers
Other Uses of Funds
Regular Salaries.
Instructional Programs Improvement Services.
Data Processing Services.
Statistical Services.
Professional and Improvement Costs for Non-Instructional Staff (e.g. workshops, etc.).
Other Instructional, Professional and Technical Services.
Garbage.
Other Property Services.
Transportation Portion of Tuition Payments.
Travel, Student, Out of District.

Other Travel.
Telephone.
Postage.
Advertising.
Printing and Binding.
Other Communication Services.
Tuition.
Architect/Engineer Services.
Negotiation Services.
Management Services.
Data Processing Services.
Statistical Services.
Election Services.
Other Non-Instructional Professional and Technical Services.
Initial and Additional Equipment Purchase.
Replacement Equipment Purchases.
Other Insurance and Judgements.
Other Capital Assets.
Planned Reserve
Student Insurance Premiums.
Fidelity Bond Premiums.
Property Insurance Premiums.
Liability Insurance.
Unrecoverable Bad Debt Write-Off
Taxes, Licenses and Assessments
Judgements and Settlements Against the District.
Depreciation (Used for Enterprise and Internal Service Funds Only)
Improvements Other Than Buildings.
Depreciable Technology
Bus and Capital Bus Improvements
Equipment.
Bus Garage Purchases
Buildings.
Land Acquisition
Food
Non-Consumable Items
Consumable Supplies and Materials
Computer Software
Technology.
Periodicals
Library Books
Textbooks
Supplies and Materials
Board and Room in Lieu of Transportation.

State School Fund Non-Reimbursable Student Transportation.
Travel, Out of District.
Travel, Local in District.
Communication
Water and Sewage.
Fuel.
Electricity.
Rentals.
Cleaning Services.
Legal Services.
Audit Services.
Non-instructional Professional and Technical Services
Instruction Services.
Contractual Employee Benefits
Supplemental Retirement Stipends
Unemployment Compensation.
Workers' Compensation.
Employee Contribution, Pick-Up.
Employer Contribution.
Employer Contribution.
Unused Leave
Sabbatical
Additional Salary
Temporary—Classified
Temporary—Licensed
Substitute—Classified
Substitutes—Licensed
Administrators
Managerial — Classified
State School Fund Reimbursable Student Transportation.
Redemption of Principal
Regular Interest
Transits
Insurance and Judgments
Dues and Fees
Other Capital Outlay
Depreciable Equipment
Buildings Acquisition
Computer Hardware
Travel
Repairs and Maintenance Services.
Property Services
Instructional, Professional and Technical Services
Post Retirement Health Benefits (PRHB)

Social Security Administration
Public Employees Retirement System
Additional Salary.
Nonpermanent Salaries.
Classified Salaries
Licensed Salaries
Grant Indirect Charges
Student Transportation Services
Transfers
Other Objects
Capital Outlay
Student Services.
Purchased Services
Associated Payroll Costs
Salaries
PERS UAL Lump Sum Payment to PERS
Fund Modifications
Reserved for Next Year
PERS UAL Contribution.
PERS UAL Contribution.
PERS UAL Contribution.
Depreciable Transportation.
Payments in Lieu of Property Taxes
Other Revenue in Lieu of Taxes
Payments in Lieu of Property Taxes – Enterprise Zones School Support Fee
Summer School Tuition
Summer School Transportation
Fees Charged to Grants
Intermediate 'I' Tax
Other Intermediate Sources
Other Restricted Grants-in-aid
Revenue in Lieu of Taxes
Medicaid Reimbursement for Eligible Early Intervention (EI) Services (Birth to Age Three) Revenue receive
Medicaid Reimbursement for Eligible Early Childhood Special Education (ECSE) Services (Ages Three to F
Revenue for/on Behalf of the District
County Tax Sales for Back Taxes
Regular Day School Tuition.
Tuition From Individuals
Tuition From Other Districts Within the State.
Tuition From Other Districts Outside the State.
Tuition/Contract Receipts for Community Services.
Tuition From Individuals
Tuition From Other Districts Within the State.
Tuition From Other Districts Outside the State.

Transportation Fees.
Regular Day School Transportation
Transportation Fees From Individuals.
Transportation Fees From Other Districts Within the State
Transportation Fees From Other Districts Outside the State.
Daily Sales — Non-Reimbursable Program.
Admissions
Fees
Concessions.
Club Fundraising
Other Extracurricular
Services Provided Other Districts Within the State.
Services Provided Other Districts Outside the State
Services Provided Other Charter Schools.
Textbook Sales.
Revenue in Lieu of Taxes.
Miscellaneous
Grants-In-Aid From the Federal Government Through Other Intermediate Agencies
Restricted Revenue From the Federal Government Through the State
Restricted Revenue Direct From the Federal Government
Unrestricted Revenue From the Federal Government Through the State
Unrestricted Revenue Direct From the Federal Government
Revenue from Intermediate Sources
Revenue from Local Sources
Revenue from Federal Sources
Revenue from State Sources
Sale of/or Compensation for Loss of Fixed Assets
Coos Bay Wagon Road Funds
Impact Aid to School Districts for Operation (PL 874)
Federal Forest Fees
Other Unrestricted Grants-in-aid
Medicaid Reimbursement for Eligible K-12 Expenses (Ages Five to Twenty-One) Revenue received from th
Transportation Fees for Foster Children
State Managed County Timber
Common School Fund
State School Fund-Accrual
State School Fund—School Lunch Match
State School Fund—General Support
Revenue for/on Behalf of the District
Natural Gas, Oil, and Mineral Receipts
Excess ESD Local Revenue
General Education Service District Funds
County School Funds
Recovery of Prior Years' Expenditure

Services Provided Other Funds
Textbook Sales and Rentals
Rental or Lease Payments from Private Contractors
Driver Education
Revenue for/on Behalf of the District
Transportation Fees From Other Districts Outside the State
Transportation Fees From Other Districts Within the State
Transportation Fees From Individuals
Adult/Continuing Education Tuition
Tuition From Other Districts Outside the State
Tuition From Other Districts Within the State
Tuition From Individuals
Revenue From Local Governmental Units Other Than Districts
Penalties and Interest on Local Option Taxes.
Construction Excise Tax
Prior Year's Local Option Taxes
Current Year's Local Option Taxes
Prior Year's Taxes
Current Year's Taxes
Resources—Beginning Fund Balance
Revenue in Lieu of Taxes
Restricted Revenue
Earnings on Investments
Services Provided Other Local Education Agencies
Contributions, Donations, and General Fundraising From Private Sources
Rentals
Food Service
Community Services Activities
Extracurricular Activities
Tuition
Penalties and Interest on Taxes
Local Option Ad Valorem Taxes Levied by District
Ad Valorem Taxes Levied by District
Long-Term Debt Financing Sources
Taxes
Other Sources
State School Fund (SSF) Transportation Equipment
Interfund Transfers
Interest on Investments.
Gain or Loss on Sale of Investments
Daily Sales — Reimbursable Programs.
Breakfast
Lunch
Special Milk Program.

Special Functions
Bookstore Sales
Student Organization Membership Dues and Fees.
Other Revenue From Local Sources
Unrestricted Revenue.
Current Year's 'I' Taxes.
Prior Year's 'I' Taxes.
Penalties and Interest on 'I' Taxes.
Unrestricted Grants-In-Aid.
Restricted Grants-In-Aid.
Bond Proceeds.
Bond Premium.
Accrued Interest.
Mortgage Receipts.
Loan Receipts.
Lease Purchase Receipts.

PBAM 2024 Definition
Direct instruction of a learner on a specific lesson or skill in a home or in a school setting.
Instructional activities combining two or more core curriculum areas in a block class, including English, S
Services which may include interagency financing structures, for students in kindergarten through grade
Instructional activities that cannot be classified under a specific curriculum area.
Courses, units of instruction and special instructional activities designed to assist students in exploring k
To be used with functions other than 1291 English Language Learner – ORS 336.079 and 1295 English Lar
All special education costs that are subject to federal maintenance of effort requirements. All special edu
Use of this area code is optional. Districts may wish to track staff development and training costs chargec
Any pre-kindergarten programs not appropriate for inclusion in the above categories.
Extracurricular activities not already defined which are generally of a voluntary nature and which are desig
Other Programs.
Expenditures in either the 100 General Fund or a 200 Special Revenue Funds to record monies spent to fu
No Area code assigned.
School District sponsored programs in which a district employee goes to the home to instruct a parent in l
Courses designed to develop skills in the use of technology.
General Professional, Technical Strands.
Examples: Agriculture, earth sciences, fisheries, environmental sciences, horticulture, wildlife, forestry.
Examples: Engineering, manufacturing, construction, related technologies, precision production.
Examples: education, government, religion, social services, law, law enforcement, legal services, child ar
Examples: Nursing, dental hygiene, dental assistant, medical assistant, radiology technician, ophthalmic
Examples: Marketing sales, entrepreneurship, finance, hospitality/tourism, computer/information system
Extracurricular activities designed to provide competitive contests for selected groups or individuals who
Learning experiences concerned with helping students participate safely, efficiently, and effectively in op
Experiences which provide students the opportunity to develop decision making skills and formulate a val
Courses, special adapted programs, and intraschool activities designed to enable each student to build a
Courses and activities designed to develop keener aesthetic awareness and increase sensitivity. skills, ar
Courses and activities designed to enable students to receive and send communication in a language oth
Those courses, units of instruction, and activities designed to develop the skills and interests of students
Experience provides students the opportunity to develop concept understandings and process skills as th
Courses and activities dealing with social relationships draw their substance from the disciplines of anth
Courses and activities designed to enable students to receive and send communication by developing th
Examples: Architecture, film, radio, fine arts, creative writing, journalism, languages, television, advertisir
Defined by the District.
Defined by the District.
Defined by the District.
Instructional programs designed to accommodate the needs of teen parents.
Learning experiences for students who are at risk of dropping out of school; who are not succeeding in a r
Instructional activities designed to improve the achievement of regular education students who are not m
Activities associated with campus monitors, school police, crossing guards, and other direct expenses as
Instructional programs delivered to youth in detention.
Including the Migrant Student Record Transfer System.
Activities concerned with providing transportation to special education students. Driving buses, providing

Special learning experiences for students with disabilities outside the regular classroom. These learning experiences are provided by other public agencies, including community colleges, other public agencies, and other public agencies.
Special learning experiences for students with disabilities who spend ½ or more of their time in a restricted instructional activities as defined under 1100 Regular Programs, 1200 Special Programs, carried on during the period between the start of the fiscal year and the end of the fiscal year.
Special learning experiences for students identified as gifted or talented.
Alternative learning experiences provided by other public agencies, including community colleges, other public agencies, and other public agencies. (For additional guidance, see Appendix E Guidelines for ELL and Non-ELL Related Expenditures.)
As defined in OAR 581-015- 2065(7).
Services designed to address a child’s developmental deficits in sensory, motor, communication, self-help, and social skills.
Instructional activities as defined under 1100 Regular Programs carried on during the period between the start of the fiscal year and the end of the fiscal year.
Instructional programs designed to meet the needs of migrant students.
Instructional activities designed for students who are disadvantaged due to socioeconomic status or other factors.
School-sponsored activities, under the guidance and supervision of district staff, are designed to provide learning experiences designed to develop knowledge and skills to meet immediate and long-range educational needs.
Record Title IA/D instructional activities here.
Facilities construction activities which cannot be classified above.
Activities concerned with the fiscal operations of the district. This program area includes budgeting, receiving, and disbursing.
Costs associated with a supplemental retirement program provided to both current and prior employees.
Educational programs that are designed for the education and training of children, who are enrolled in pre-kindergarten through grade 12.
Learning experiences concerned with knowledge, skills, appreciation, attitudes, and behavioral characteristics.
Learning experiences concerned with knowledge, skills, appreciation, attitudes, and behavioral characteristics.
Learning experiences concerned with knowledge, skills, appreciation, attitudes, and behavioral characteristics.
Apportionment of equalization funds and distribution of other funds by the educational service districts (ESDs).
The one-time lump sum payment made to PERS following the issuance of a PERS unfunded accrued liability (UAC) certificate.
Expenditures for debt retirement paid in full within the fiscal year.
Expenditures for debt retirement exceeding twelve months.
Activities concerned with major capital expenditures that are eligible for general obligation bonding, such as building acquisition through purchase or construction and building improvements.
Activities concerned with building acquisition through purchase or construction and building improvements.
Activities pertaining to the initial acquisition of sites and improvements thereon.
Activities pertaining to directing and managing facilities acquisition and construction services.
Services provided the community which cannot be classified above. College scholarship expenditures are included in this category.
Services to students attending a school established by an agency other than the state, subdivision of the state, or a local government.
Activities pertaining to the provision of personal needs of individuals who have been designated as needy or indigent.
Activities pertaining to the operating of public libraries by a district, or the provision of library services to the community.
Activities concerned with providing services to civic affairs or organizations. This program area includes services to civic affairs or organizations.
Activities concerned with providing recreation for the community as a whole, or for some segment of the community.
Activities concerned with directing and managing community services activities.
Activities concerned with delivering food to the school or district.
Activities concerned with preparing and serving regular and incidental meals, lunches, or snacks to students.
Activities of directing and managing food services.
Activities pertaining to directing and managing student transportation services.
Activities of directing and managing the operation and maintenance of the school plant facilities.
Activities concerned with directing and managing technology services.

Activities of directing and managing staff services.
Activities of directing and managing information services.
Activities associated with directing and managing the planning, research, development, and evaluation services.
Activities concerned with purchasing, paying, transporting, exchanging, and maintaining goods and services.
Activities performed by the superintendent and such assistants as deputy, associate, and assistant superintendent.
Activities concerned with the use of all teaching and learning resources, including hardware, software, print materials, and other instructional materials.
Activities designed primarily for assisting instructional staff in planning, developing, and evaluating the program.
Activities which have as their purpose the identification, assessment, and treatment of students with individual learning needs.
Activities concerned with administering psychological tests and interpreting the results; gathering and interpreting data.
Physical and mental health services which are not direct instruction. Included are activities that provide services to students and staff.
Those activities of counseling students and parents providing consultation with other staff members on learning and behavior problems.
Activities which are designed to improve student attendance at school, which attempt to prevent or solve attendance problems.
These are transactions which withdraw money from one fund and place it in another without recourse. Unrestricted fund transfers.
The servicing of the debt of a district. Categories of debt service are listed under objects.
Activities pertaining to the provisions of programs for the custodial care of children in residential day schools.
Activities which are not directly related to the provision of education for pupils in a district. These include:
Activities concerned with other Enterprise Services
Activities concerned with providing food to students and staff in a school or district. This service area includes food service and snack service.
Activities concerned with buying, storing, and distributing supplies, furniture, and equipment; and those activities which are not directly related to the provision of education for pupils in a district.
Activities concerned with alternative transportation costs, including active transportation (walking, bicycling, etc.).
Activities concerned with the transportation of students between home and school, as provided by state or local transportation agencies.
Activities concerned with keeping the physical plant open, comfortable, and safe for use; and keeping the physical plant in good repair.
Activities concerned with directing and managing the business support services as a group.
Activities concerned with retention and disposal of district records.
Activities concerned with all aspects of technology, which include computing and data processing services.
Activities concerned with maintaining an efficient staff for the district including such activities as recruiting, hiring, and training.
Activities concerned with writing, editing, and other preparation necessary to disseminate educational materials.
Activities, on a system wide basis, associated with conducting and managing programs of planning, research, and evaluation.
Activities concerned with directing and managing the central support services as a group.
Other than general administration, which supports each of the other instructional and supporting services.
Other school administration services which cannot be recorded under the preceding functions.
Activities concerned with directing and managing the operation of a particular school or schools. Includes activities of the principal.
Activities concerned with direction and management of student support services e.g., special education, gifted and talented, and other special programs.
Activities associated with the overall general administrative or executive responsibility for the entire district.
Activities of the legally elected or appointed body vested with responsibilities for educational planning and management.
Activities specifically designed for instructional staff (including instructional assistants) to assist in preparation of instruction.
Activities to measure individual student achievement. Information obtained is generally used to monitor individual student progress.
Activities which are designed to assess and improve the well-being of students and/or supplement the teaching process.
Activities included in this category are servicing the debt of a district, conduit-type transfers from one fund to another, and other non-instructional activities.
Activities concerned with the acquisition of land and buildings, major remodeling and construction of buildings.
Activities concerned with operations that are financed and operated in a manner similar to private business enterprises.
Support Services. Support services are those services which provide administrative, technical, personal (e.g., food service, transportation, etc.) and other support services.
Activities dealing directly with the teaching of students, or the interaction between teacher and students.
School-sponsored activities, under the guidance and supervision of district staff, are designed to provide enrichment and supplementary instruction.

Other activities associated with psychological services not classified above.
Activities associated with directing and managing speech pathology and audiology services.
Activities organized for the identification of students with speech and language disorders: diagnosis and e
Activities organized for the identification of students with hearing loss; determination of the range, nature
Other activities associated with speech pathology and audiology services not classified above.
Activities associated with assisting the instructional staff with the content and process of providing learni
Activities associated with directing and managing the improvement of instruction services. The District's I
Activities designed to aid teachers in developing, preparing, and utilizing curriculum materials.
Activities for improving instruction other than those classified above.
Activities concerned with directing and managing educational media services.
Activities, such as selecting, acquiring, preparing, cataloging, and circulating print and non-print material
Activities, such as selecting, preparing, maintaining, and circulating to instructional and administrative st
Activities concerned with planning, programming, writing, presenting, and receiving educational program
Educational media services other than those classified above.
Activities concerned with establishing and administering policy in connection with operating the district.
Activities concerned with developing and maintaining good relationships with state and federal officials.
Other general administrative services which cannot be recorded under the preceding functions.
Activities of directing and managing fiscal services which includes the activities of the assistant superinte
Activities concerned with supervising budget planning, formulation, control, and analysis.
Activities concerned with properly receiving and paying money for the district.
Activities concerned with paying periodic salaries and wages to employees for services rendered; paying i
Activities concerned with maintaining records of the financial operations and transactions of the district v
Activities concerned with verifying the account records which include evaluating the adequacy of the inte
Activities concerned with preparing and maintaining current inventory records of land, buildings, and mov
Activities involving the systematic identification and evaluation of exposure to loss within the district and
Fiscal services which cannot be classified under the preceding functions. Including unemployment.
Activities concerned with keeping a physical plant clean and ready for daily use. Included are: operating t
Activities concerned with maintaining land and its improvements (other than buildings) in good condition.
Expenditures for activities concerned with maintenance of the total district's physical plant, including rep
Activities concerned with maintaining security and safety of school property.
Operation and maintenance of plant activities which cannot be classified under the preceding functions.
Activities concerned with operating vehicles for student transportation. Driving of buses or other student t
Student transportation services which cannot be classified under the preceding functions.
Activities of directing and managing internal services.
Activities of purchasing supplies, furniture, equipment, and materials, used in school or district operation
The operation of the system wide activities of receiving, storing, and distributing: supplies, furniture, equi
Activities of printing and publishing administrative publications, such as annual reports, school directorie
Other internal services which cannot be classified under the preceding functions.
Activities concerned with the evolving process of utilizing the products of research and considered judgm
Activities concerned with ascertaining or judging the value of an action or an outcome of an action by care
Activities concerned with the selection or identification of the overall long-range goals, priorities, and obje
Activities concerned with the systematic study and investigation of the various aspects of education unde
Activities concerned with seeking, writing, and submitting grants for the district.
Activities concerned with relating and describing statistical information.

Costs specifically incurred related to activities for raising new resources not related to specific student ac
Other services of this nature not described above.
Activities concerned with writing, editing, and providing administrative information to students and staff.
Activities concerned with writing, editing, and other preparation necessary to disseminate educational an
Activities concerned with writing, editing, and other preparation necessary to disseminate to managemen
Activities concerned with information services not classified above.
Activities concerned with employment and assigning personnel for the district.
Services rendered in connection with the systematic recording and summarizing of information relating to
Activities concerned with medical, dental, and nursing services provided for district employees. Included
Staff services which cannot be classified under the preceding functions.
Activities concerned with the search for and an evaluation of alternatives which are relevant to defined ob
Activities concerned with the preparation of a logical sequence of operations to be performed either man
Activities concerned with scheduling, maintaining, and producing data. These activities include operating
Activities concerned with technology which are not described above. Including telephone, T1 lines, and fr
Food services activities which cannot be classified under the preceding functions.
Budgeted amount to be transferred by school board resolution to the proper expenditure code.
Federal Revenue Sources and Expenditures.
High School Success.
Student Investment Account.
Account for operations that are financed and operated in a manner similar to private business enterprises
Account for the operation of district functions that provide goods or services to other district functions, ot
Account for financial resources used to acquire or construct major capital facilities (other than those of p
Account for the accumulation of resources for, and the payment of, general long-term debt, principal and
Account for the proceeds of specific revenue sources (other than expendable trusts or major capital proje
Accounts for all financial resources of the districts except those required to be accounted for in another fr
Trust and Agency Funds. private organizations, other governmental units, and/or other funds. Trust funds
State, Local, and Other Revenue Sources and Expenditures.
Food Service Sources and Expenditures.
Asset account to record a loan by one fund to another fund in the same governmental unit. Separate acco
Provision for that portion of loans receivable estimated to be uncollectible. Shown as a deduction from Lc
Value of goods held by a district for resale rather than for use in its operations.
Amounts due to designated payees in the form of a written order drawn by the district directing the distric
Amounts due on contracts for assets, goods, and services received by a district.
Amounts due by a district on contracts for construction of buildings, structures, and other improvements.
Bonds which have reached or passed their maturity date but which remain unpaid.
Amounts owed by a particular fund to another fund in the same district for goods and services rendered. S
Equity account in proprietary funds showing the amount of fund capital contributed by the governmental l
Account in the General Long-Term Debt Account Group designating the amount of fund balance available
Other long-term liabilities not provided elsewhere.
Liabilities on construction contracts for the completed portion of work on which part of the liability has no
Funds deposited by the district as prerequisite to receiving services and/or goods.
Amounts due to be paid by a district as the result of court decisions, including condemnation awards in p.
The amount of the actuarial deficiency on a locally operated pension plan to be contributed by the district
Amounts remaining to be paid on lease-purchase agreements.

Bonds which have not reached or passed their maturity date, and which are not due within one year.
Other current liabilities not provided elsewhere.
Amounts due to fiscal agents, such as commercial banks, for serving a district's matured indebtedness.
Amounts owed by the reporting district to another governmental unit. Separate accounts are recommended
Liability account for a debt owed by one fund to another fund in the same governmental unit. Separate accounts
Bonds which have not reached or passed their maturity date but are due within one year or less.
Salary and fringe benefit costs incurred during the current accounting period that are not payable until a subsequent
Interest due within one year.
Accumulated amounts for depreciation of machinery and equipment (optional in the general fixed assets account
Accumulated amounts for depreciation of land improvements (optional in the general fixed assets account
Accumulated amounts for depreciation of buildings and building improvements (optional in the general fixed assets
Tangible property of a more or less permanent nature other than land, buildings, or improvements thereon
Cost of construction work undertaken but not yet completed.
Acquisition value of permanent improvements other than buildings that add value to land (fences, retaining walls, etc.)
Acquisition value of land owned by a district, including purchase price and associated costs (legal fees, filing fees, etc.)
Account in the General Long-Term Debt Account Group designating the amount to be provided from taxes
Amounts owing on open account from private persons, firms, or corporations for goods and services furnished
Provision for that portion of accounts receivable estimated to be uncollectible. Shown as a deduction from
Amounts loaned to persons or organizations, including notes taken as security for such loans, where permitted
Securities and real estate held for the production of income in the form of interest, dividends, rentals, or royalties
Current assets not provided for elsewhere.
Expenses paid for benefits not yet received. Prepaid expenses differ from deferred charges in that they are
Cost of supplies and equipment on hand not yet distributed to requisitioning units.
Amounts owed to a particular fund by another fund in the same district for goods sold or services rendered
Amounts due to the reporting governmental unit from another governmental unit (grants-in-aid, shared taxes, etc.)
Provision for that portion of taxes receivable estimated to be uncollectible. Shown as a deduction from
The amount of interest receivable on investments, exclusive of interest purchased. Interest purchased shown
The uncollected portion of taxes levied which has become due, including any accrued interest or penalties
Account in the general fixed assets account group representing the district's equity in general fixed assets
A sum of money set aside for paying small obligations for which issuing a formal voucher and check would be
A sum of money set aside for the purpose of providing change.
Deposits with fiscal agents, such as commercial banks, for the payment of matured bonds and interest.
Currency, coins, checks, postal and express money orders, and bankers' drafts on hand.
All funds on deposit with a bank or savings and loan institution normally in non-interest-bearing accounts
In the General Fund, amounts not contained in other classifications. For other governmental funds, amounts
Amounts intended to be used by the governing body for specific purposes. In the General Fund, represented
Amounts constrained for a specific purpose by the government's highest level of decision-making authority
Amounts constrained for a specific purpose by external parties, constitutional provision, or enabling legislation
Amounts that cannot be spent due to form (e.g., inventories, prepaid amounts, long-term receivables, prepaids, etc.)
Acquisition value of permanent structures used to house persons and property owned by the district, including
Cash and investments set aside to repay short-term notes.
Liability account representing revenues collected before they become due.
Debt with a maturity of more than one year after the date of issuance.
Debts the district expects to pay within a short period of time, usually within a year or less.

Assets the district intends to hold or continue in use over a long period of time.
Cash or anything that can be readily converted into cash.
Appears in balance sheets prepared during the fiscal period and designates the total of expenditures charged to the fund.
Total of all revenues realized during a period; increase in ownership equity. Appears only in period balance sheets.
Accounts showing the excess of a fund over its liabilities; portions may be reserved for future use.
Authorizations granted by the school board or legislative body to make expenditures for specific purposes.
Amount of revenues estimated to be received or to become receivable during the fiscal period. Appears in budget.
Budgeted and actual amounts of revenues as well as offsetting accounts which normally have debit balances.
Short-term obligations representing amounts borrowed for short periods of time, usually evidenced by notes.
Liabilities on an open account owing to private persons, firms, or corporations for goods and services received.
Liability for deposits received as a prerequisite to providing or receiving services and/or goods.
Amount receivable upon sale of bonds.
Interest accrued on investments between the last interest payment date and date of purchase. Carried as a liability.
The excess of the face value of securities over the amount paid for them which has not yet been written off.
Accumulated earnings of proprietary funds retained in the fund and reserved for a specific purpose (e.g., 10% of net revenues).
Accumulated earnings of proprietary funds retained in the fund and not reserved for any specific purpose.
Segregation of a portion of fund balance indicating assets equal to the amount are tied up and not available for other purposes.
The excess of the amount paid for securities over the face value which has not yet been amortized. Use of amortization schedule.
Portion of the excess of bond proceeds over par value which remains to be amortized over the remaining life of the bonds.
Amounts deducted from employees' salaries for withholding taxes and other purposes. District-paid benefits.
Obligations in the form of purchase orders, contracts, or salary commitments chargeable to an appropriate fund.
An unconditional written promise signed by the maker to pay a certain sum of money one year or more after the date of issue.
Expenditures from current funds for interest on serial bonds, short-term loans and interest included in capital projects.
Expenditures for the initial and additional improvement of sites and adjacent ways after acquisition by the district.
Only record expenditures for bus garage, bus, and capital bus improvement interest here.
Conduit-type payments to districts, generally for tuition outside the state for services rendered to students.
Conduit-type payments to districts, generally for tuition in the state for services rendered to students residing in the district.
Conduit-type payments to private schools, generally for tuition for students residing in the paying district.
Expenditures to reimburse Charter Schools for services rendered to students.
Tuition payments which cannot be classified above. Record postgraduation scholarship payments here.
This category is to be used for those transfer transactions which cannot be identified in the above classifications.
Full-time, part-time, and prorated portions of the costs for work performed by employees of the district who are not classified above.
Services performed by persons qualified to assist teachers and supervisors in enhancing the quality of the instructional program.
Use object 342 Travel, Out of District for non-instructional staff travel, conferences, etc.
Services which are professional and technical in nature have not been classified above. Including sign language interpreters.
Expenditures for garbage service.
Property Services purchased which are not classified above.
Conduit-type payments for transportation expenses.
Travel expenditures for students to points outside the boundaries of the school district.

Travel expenditures which cannot be classified above.
Expenditures for telephone services, faxes, pagers, and toll charges.
Expenditures for postage stamps and postage machine rentals.
Expenditures for printed announcements, legal notices in professional periodicals and newspapers, or an
Expenditures for job printing and binding usually according to specifications of the district. This includes t
Including T1 lines.
Expenditures to reimburse other educational agencies for services rendered to students. Use object 37X,
Expenditures for professional services of licensed professionals for consultation, regarding the district's f
Expenditures for services performed in negotiating or conferring with any labor group.
Services performed by persons qualified to assist management either in the broad policy area or in the ge
Services performed by persons, organizations, or other agencies qualified to process data. This category i
Non-payroll services performed by persons or an organization qualified to assist in handling statistics. Thi
Expenditures for the costs incurred by the county clerk in conducting elections for the school district. Use
Other professional services not classified above. Including sign language interpretation, language interpr
Expenditures for the initial and additional equipment, such as machinery, furniture, fixtures, and vehicles
Expenditures for replacement of equipment which has been disposed.
Payments for insurance and judgments not classified elsewhere.
Depreciation expense for capital assets not denoted above.
Amounts set aside for operating contingencies for expenditures which cannot be foreseen and planned in
Expenditures for premiums on student accident insurance.
Expenditures for bonds guaranteeing the district against losses resulting from the actions of the treasurer
Expenditures for insurance on any type of property owned or leased by the district. Charge to function 254
Expenditures for insurance coverage of the district, or its officers, against losses resulting from judgments
This includes taxes, licenses, and assessments paid to a government body; and penalties assessed for la
Expenditures from current funds for all judgments against the district that are not covered by liability insu
The portion of the cost of a fixed asset, except for land, which is charged as an expense during a particula
Depreciation expense for improvements to sites other than the building facility. Examples include roadwa
Expenditures for computer hardware, related equipment, and other capital outlay for technology. See obj
The purchase of buses and capital bus improvements e.g., handicap lift. All purchases using this code m
Depreciation expense for equipment including buses, automobiles, and other vehicles. These items are d
The purchase of a garage or garage improvements used for student transportation. All purchases using th
Depreciation expense for buildings and additions.
Expenditures for the purchase of land.
Expenditures for food purchases related to 3100 Food Service only. Other food purchases should remain
Expenditures for equipment with a current value of less than \$5,000 or for items which are "equipment-li
Expenditures for all supplies for the operation of a district, including freight and cartage. If such supplies
Expenditures for published computer software. Include licensure and usage fees for software here. The C
Depreciation expense for technology, including workstations, servers, and networking equipment.
Expenditures for periodicals and newspapers. A periodical is any publication appearing at regular interval
Expenditures for regular or incidental purchases of library books available for general use by students, inc
Expenditures for prescribed books which are purchased for students or groups of students, and resold or
Amounts paid for material items of an expendable nature that are consumed, worn out, or deteriorated by
Payments, such as board and room made to parents or guardians to maintain children near school. Exper

Contract payments for transporting students on student body trips, interscholastic athletic events, out of
Travel expenditures for district personnel to points outside the boundaries of the school district. Non-inst
Expenditures for district personnel between facilities and within the boundaries of the school district.
Services provided by persons or businesses to assist in transmitting and receiving data or information. Th
Expenditures for water and sewage services.
Expenditures for fuel used for heating and/or cooling.
Expenditures for electrical energy
Expenditures for leasing or renting costs incurred by the district. This includes bus and other vehicle renta
Services purchased to clean buildings or equipment other than those provided by district employees.
Expenditures for consultations with the district's attorney and associated legal costs. Use with function 2
Expenditures to an audit firm for completion of the annual audit of the district's financial records. Also inc
Services which by their nature can be performed only by persons with specialized skills and knowledge. In
Non-payroll services performed by qualified persons directly engaged in providing learning experiences fr
Amounts paid by the district which are a result of a negotiated agreement between the Board of Directors
Costs for retired employees of the district who receive supplementary retirement payments from the dist
Amounts paid by the district to provide unemployment compensation for its employees.
Amounts paid by the districts to provide workers' compensation insurance for its employees.
Employee portion, paid by employer to the Public Employees Retirement System (PERS).
Employer's contribution to the Oregon Public Services Retirement Plan, OPSRP or Tier III.
Employer's contribution to the Public Employees Retirement System (PERS), Tier I and Tier II.
Unused leave payments when an employee retires or terminates employment are allowable in the year of
Amounts paid by the district to employees on sabbatical leave.
Money paid to employees of the district in positions of either a temporary or permanent nature for work p
Costs for work performed by temporary classified employees.
Salaries of temporary employees—full-time, part-time, and prorated portions of the costs for work perfor
Costs for the work performed by substitute classified employees of the district.
Costs for work performed by substitute licensed employees of the district.
Costs for work performed by regular administrative employees who manage, direct, or administer program
Costs for work performed by employees who supervise or manage programs of the district. Supervisors o
Contract payments for transporting students from home to school and return, as well as instructional fiel
Expenditures which are from current funds to retire bonds and/or principal portion of contractual paymen
Expenditures for all interest, excluding bus garage, bus, and capital bus improvement interest
This category represents transactions which are transit or flow-through means to convey money to the re
Insurance to protect school board members and their employees against loss due to accident or neglect.
Expenditures or assessments for membership in professional or other organizations or associations or pa
Expenditures for all other Capital Outlay not classified above.
Expenditures for the initial, additional, and replacement items of equipment; except for buses and capita
Expenditures for acquiring buildings and additions, either existing or to be constructed, except for bus ga
Expenditures for non-capital computer hardware, generally of value not meeting the capital expenditure c
Costs for transportation for all district personnel (including students), conference registration, meals, ho
Expenditures for repairs and maintenance services not provided directly by district personnel. This includ
Services purchased to operate, repair, maintain, insure, and rent property owned and/ or used by the dist
Services which by their nature can be performed only by persons with specialized skills and knowledge. In
Post-Retirement Health Benefits are costs of health insurance or health services not included in a pensio

Employer's contribution to the Social Security/ Medicare, Federal Insurance Contributions Act (FICA) for District payments to the Public Employees Retirement System (PERS).
District defined. Must be reported to the State as object 130.
Full-time, part-time, and prorated portions of the costs for work performed by employees of the district w
Costs for work performed by regular classified employees of the district. Confidential staff may be coded
Costs for work performed by regular licensed employees of the district. Include licensed coordinators an
Charges made to a grant to recover charges made to administration. See Chapter 3, Grant Administrative
Expenditures to persons (not on the district payroll) or agencies for the purpose of transporting children. 7
This object category does not represent a purchase; rather it is used as an accounting entity to show that
Amounts paid for goods and services not otherwise classified above. This includes expenditures for retire
Expenditures for the acquisition of fixed assets or additions to fixed assets. They are expenditures for: lan
Non-payroll services of qualified personnel to assist students and their parents in solving mental and phy
Services which, by their nature, can be performed only by persons or firms with specialized skills and kno
Amounts paid by the district on behalf of employees; these amounts are not included in the gross salary b
Amounts paid to employees of the district who are considered to be in positions of a permanent nature or
The one-time lump sum payment made to PERS following the issuance of a Public Employees Retirement
This category represents transactions of conveying money from one fund to another. Generally, this takes
(Use only with function 7000 Unappropriated Ending Fund Balance.)
Employers Public Employees Retirement System (PERS) debt service costs related to the PERS Unfunded
Employers Public Employees Retirement System (PERS) debt service costs related to the PERS Unfunded
Employers Public Employees Retirement System (PERS) debt service costs related to the PERS Unfunded
Expenditures for bus garages, buses, and capital bus improvements for student transportation. See objec
Amounts received in lieu of property taxes, including Western Oregon Severance Tax, Eastern Oregon Sev
These resources are considered Local Revenue for the purposes of the State School Fund Formula.
Amounts collected as a result of House Bill 2009 from the 2023 legislative session which allows local mu
Money received as tuition for students attending summer school.
Money received for transporting students to and from summer school.
Indirect administrative charges assessed to grants.
Revenue received from city and county income taxes.
Revenue for the Heavy Equipment Rental Tax (HERT) is recorded here.
Use 3299 for restricted grants in aid from the state, e.g. Student Investment Account, High School Succes
Payments made out of general revenue by a state to the district in lieu of taxes it would have had to pay ha
Revenue received from the Oregon Health Authority (OHA) for Medicaid reimbursement for EI services pro
Revenue received from the Oregon Health Authority (OHA) for Medicaid reimbursement for ECSE services
Payments made by the federal government for the benefit of the district, or contributions of equipment or
Revenue received as a result of the sale of property to satisfy a property tax lien.
Money received as tuition for students attending the regular day schools in the district, including alternati
Money received from individuals for education provided by the district.
Money received from districts for education provided by the district.
Money received from districts for education provided by the district.

Money received from individuals, private sources, welfare agencies, and other districts for transporting st
Money received for transporting students to and from regular day schools and school activities, including
Money received from students or adults for the sale of non-reimbursable breakfasts, lunches, and milk. T
Revenue from patrons of a school - sponsored activity, such as a concert or football game
Revenue from students for fees, such as locker fees, towel fees, and equipment fees. Transportation fees
Other revenue from extracurricular activities.
Revenue from services to districts within the state.
Revenue from services to districts outside the state.
Revenue from services to Charter Schools.
Revenue from the sale of textbooks.
Payments made out of general revenues by the federal government unit to the district in lieu of taxes it wo
Revenue from local sources not provided elsewhere. Record Medicaid Administrative Claiming (MAC) rei
Revenues from the federal government through an intermediate agency
Revenues from the federal government through the state as grants to the district which must be used for a
Revenues direct from the federal government as grants to the district which must be used for a categorica
Revenues from the federal government through the state as grants which can be used for any legal purpo
Revenue direct from the federal government as grants to the district which can be used for any legal purp
Revenue from the sale of school property or compensation for the sale or loss of fixed assets.
These resources are considered Local Revenue for the purposes of the State School Fund Formula.
ORS 294.060
Revenue received from the Oregon Health Authority (OHA) for Medicaid reimbursement for services purs
Revenue is in addition to that distributed through the county school fund. ORS 530. These resources are c
ORS 327.403. These resources are considered Local Revenue for the purposes of the State School Fund F
That portion of the State School Fund paid in July and accrued to prior year
That portion of the grant from the State School Fund which is earmarked by the district for the required m
ORS 327.006 to 327.013.
Payments made by an intermediate governmental jurisdiction for the benefit of the district, or contributio
Local revenue that exceeds what is guaranteed to the ESD through the funding formula (property taxes). T
Revenue received by the district that is not referred to in other specific intermediate or other sources from
Revenue from the apportionment of the resources of the County School Fund, except Federal Forest Fees
Refund of expenditure made in a prior fiscal year.

Services provided other funds, such as printing or data processing. Generally, this account is only used in
Revenue from the rental or sale of textbooks.
Payments received from private contractors for the use of district-owned buses and garages in the operat
Payment made by a state for the benefit of the district, or contributions of equipment or supplies. It includ
Money received as tuition for students attending adult/ continuing education schools in the district.
Money received for regular day schools tuition from districts outside the state.
Money received for regular day schools tuition from other districts within the state.
Money received from individuals, private sources, or welfare agencies as tuition in regular day schools.
Revenue from the appropriations of another local governmental unit. The district is not the final authority,
Amounts collected as penalties for the payment of local option taxes after the due date, and the interest c
Amounts collected as a result of Senate Bill 1036 from the 2007 legislative session which allows for a cor
Local option taxes collected for fiscal periods preceding the current year.
Local option property taxes levied by a district on the assessed value of real property located within the di
Taxes collected for fiscal periods preceding the current year
Property taxes levied by a district on the assessed value of real property located within the district which,
Payments made out of general revenues by an intermediate governmental unit to the district in lieu of tax
Revenue received as grants by the district which must be used for a categorical or specific purpose. If suc
Money received as profit from holdings for savings.
Revenue from services provided in other districts, other than for tuition and transportation services. Thes
Money received from a philanthropic foundation, private individuals, or private organizations for which no
Revenue from the rental of either real or personal property owned by the school.
Revenue for dispensing food to students and adults.
Revenue from community services activities operated by a district. For example, revenue received from th
Revenue from school - sponsored activities.
Money received from individuals, welfare agencies, private sources, and other districts for education prov
Amounts collected as penalties for the payment of taxes after the due date, and the interest charged on d
Local option taxes levied by a district on the "Tax Gap" valuation of real and assessed property located w
Taxes levied by a district on the assessed valuation of real and personal property located within the distri
The principal portion from the sale of bonds.
Compulsory charges levied by a governmental unit for the purpose of financing services performed for the
ORS 327.033.
Revenue earned or received from another fund which will not be repaid.
Interest received on temporary or permanent investment in United States Treasury bills, notes, bonds; sav
Gains or losses realized from the sale of bonds or stocks. Gains represent the excess of the sales proceec
Revenue from students for the sale of breakfasts, lunches, and milk which are considered reimbursable b
Money received from students for the sale of reimbursable breakfasts as part of the School Breakfast Prog
Money received from students for the sale of reimbursable lunches as part of the National School Lunch F
Money received for the sale of reimbursable milk as part of the Special Milk Program.

Money received from students, adults or organizations for the sale of food products and services is consid
Revenue from sales by students or student-sponsored bookstores.
Revenue from students for memberships in school clubs or organizations.
Other revenue from local sources which are not classified above.
Revenue received as grants by the district can be used for any legal purpose desired by the district without
Income Taxes collected by the city or county for fiscal periods for the current year.
Taxes collected by the city or county for fiscal periods preceding the current year.
Amounts collected as penalties for the payment of income taxes after the due date, and the interest charge
Revenue recorded as grants by the district from state funds which can be used for any legal purpose desired
Revenue recorded as grants by the district from state funds which must be used for a categorical or specific
Receipts of proceeds from the sale of bonds.
Revenue from accrued interest from the sale of bonds.

Required	Deleted Code	PBAM 2027 Link
		PROG:4:8000
Social Science, Math, Science.		PROG:4:1000
x		PROG:3:301
		PROG:3:100
Key occupational career areas, in ass		PROG:2:41
x		PROG:2:35
x		PROG:2:21
ed to functions other than 2240 Instru		OBJ:3:222
	x	
igned to assist t	x	
	x	
x	x	
		CURR:3:390
how to teach a specific lesson to a c		CURR:2:30
		CURR:3:260
		CURR:3:255
		CURR:3:254
		CURR:3:253
nd family services.		CURR:3:252
technician, nurse's aide, dentistry,		CURR:3:251
ns, accounting, personnel, and econ		CURR:3:250
are trained and coached to play gar		CURR:3:240
erating an automobile in traffic.		CURR:3:230
lue system, as they relate to healthf		CURR:3:220
nd maintain physical powers, skills		CURR:3:210
x		CURR:3:200
x		CURR:3:140
x		CURR:3:130
x		CURR:3:120
x		CURR:3:110
x		CURR:3:100
ng, public relat	x	
		CURR:2:255
	x	
	x	
x		PROG:4:4021
x		PROG:4:4002
x		PROG:4:4000
ssociated with services intended to e		PROG:4:3610
x		PROG:4:3300
		PROG:4:3220
g attendant services, fuel, supplies,		PROG:4:2014
		PROG:4:2003

		PROG:4:2002
x		PROG:4:2001
x		PROG:4:2000
g the period between the end of the		PROG:3:811
x		PROG:3:420
school districts, education service c		PROG:3:402
x	x	
		PROG:3:203
		PROG:3:202
x		PROG:3:201
x		PROG:2:81
x		PROG:2:32
er circumstances that can affect the		PROG:2:31
x		PROG:2:24
x		PROG:1:5
x		PROG:1:3
x		OBJ:4:2411
x		OBJ:4:1234
x		OBJ:3:215
x		GRADE:2:10
x		GRADE:1:3
x		GRADE:1:2
x		GRADE:1:1
x		FUNCT:3:640
x		FUNCT:3:630
		FUNCT:3:520
		FUNCT:3:500
x		FUNCT:3:406
x		FUNCT:3:403
x		FUNCT:3:401
x		FUNCT:3:400
e recorded here.		FUNCT:3:326
state, or the federal government, wh		FUNCT:3:325
by an appropriate governmental en		FUNCT:3:324
he general public through the schoo		FUNCT:3:323
ervices to: parent-teacher associati		FUNCT:3:322
community. Included are such staff		FUNCT:3:321
		FUNCT:3:310
		FUNCT:3:302
nts and staff in a school or district v		FUNCT:3:301
		FUNCT:3:300
		FUNCT:3:252
		FUNCT:3:251
		FUNCT:3:245

		FUNCT:3:244
		FUNCT:3:243
ervice area.		FUNCT:3:242
ces for the district. Included are the		FUNCT:3:240
rintendents, in the general direction		FUNCT:3:221
x		FUNCT:3:211
x		FUNCT:3:210
x		FUNCT:3:204
x		FUNCT:3:203
x		FUNCT:3:202
x		FUNCT:3:201
x		FUNCT:3:200
x		FUNCT:2:600
x		FUNCT:2:50
x		FUNCT:2:33
x		FUNCT:2:32
x		FUNCT:2:31
x		FUNCT:2:30
x		FUNCT:2:254
x		FUNCT:2:253
x		FUNCT:2:252
x		FUNCT:2:251
x		FUNCT:2:250
x		FUNCT:2:246
x		FUNCT:2:245
x		FUNCT:2:244
x		FUNCT:2:243
x		FUNCT:2:242
x		FUNCT:2:241
s programs. These activities include		FUNCT:2:24
x		FUNCT:2:231
x		FUNCT:2:230
x		FUNCT:2:23
x		FUNCT:2:221
x		FUNCT:2:220
x		FUNCT:2:213
x		FUNCT:2:212
aching process.		FUNCT:2:20
x		FUNCT:1:6
x		FUNCT:1:4
x		FUNCT:1:3
x		FUNCT:1:2
Teaching may be provided for stude		FUNCT:1:1
x		CURR:2:24

x	x	
x		OBJ:3:403
x	x	
and workers, as	contrasted with prog	PROG:2:10
x	x	
x	x	
x	x	
x	x	
x	x	
n Service Area	x	
	x	
	x	
		CURR:3:300
		PROG:4:2013
	x	
	x	
	x	
	x	
	x	
ts, teen parent	x	
11), carried on	x	
ns, carried on d	x	
during the perio	x	
	x	
	x	
es, response to	x	
s and parents, i	x	
ta. Data is use	x	
	x	
	x	
ir educational,	x	
assist the stud	x	
students with th	x	
e part-time emp	x	
	x	
	x	
t screening for	x	
	x	
and referrals fo	x	
	x	
	x	
nt of ability, ap	x	
which the stud	x	
e or more stud	x	

	x	
	x	
appraisal of spe	x	
, and degree of	x	
	x	
ng experiences	x	
Director of Inst	x	
	x	
	x	
	x	
s as well as ne	x	
aff all multime	x	
s or segments	x	
	x	
	x	
	x	
	x	
endent, directo	x	
	x	
	x	
related payroll	x	
which include a	x	
rnal control sys	x	
vable equipmer	x	
selection of the	x	
	x	
he heating, ligh	x	
.	x	
air and replace	x	
	x	
	x	
transportation	x	
	x	
	x	
l.	x	
oment, materia	x	
es, and manual	x	
	x	
ent for the deli	x	
eful appraisal o	x	
ectives of an or	x	
ertaken to estal	x	
	x	
	x	

activities. Fundra	x	
	x	
	x	
nd administrati	x	
nt information a	x	
	x	
	x	
o staff member	x	
are physical ex	x	
	x	
bjectives, base	x	
ually or electro	x	
g business mac	x	
ractional lease	x	
	x	
	x	
		SOUR:2:40
		GRANT:4:4723
		GRANT:4:4722
s where the stated intent is that the		GAAP:3:400
ther districts, or to other government		FUND:3:610
roprietary funds and trust funds). Th		FUND:3:400
i interest.		FUND:3:300
ects) that are legally restricted to exp		FUND:3:200
und.		FUND:3:100
would include nonexpendable trust		FUND:2:73
	x	
	x	
ounts are recommended for each int		GL:4:1034
ans Receivabl	x	
	x	
t treasurer to p	x	
	x	
	x	
	x	
Separate accounts are recommende		GL:4:3014
unit from general government reven		PGL:3:900
e in the Debt Service Fund for retirem		GL:4:5010
		GL:4:3513
ot been paid pending final inspection		GL:4:3512
		GL:4:3511
ayment for private property taken fo		GL:4:3509
t on behalf of present employees.		GL:4:3506
		GL:4:3502

		GL:4:3500
		GL:4:3030
		GL:4:3013
ed for each interagency payable.		GL:4:3012
counts are recommended for each i		GL:4:3011
		GL:4:3007
subsequent accounting period.		GL:4:3004
		GL:4:3002
account group; required in propriet		GL:4:2502
nt group).		GL:4:2501
xed assets account group).		GL:4:2500
o (e.g., machinery, tools, trucks, cars		GL:4:2012
		GL:4:2002
ng walls, sidewalks, pavements, gut		GL:4:2001
ling, excavation, and other improve		GL:4:2000
s or other revenue to retire long-term		GL:4:1520
ished by a district (excluding amount		GL:4:1515
m 153 Other Accounts Receivable.		GL:4:1514
nitted by statutory authority.		GL:4:1512
ease payments. Excludes fixed asse		GL:4:1500
		GL:4:1060
e spread over a shorter period of tim		GL:4:1050
		GL:4:1040
d. Separate accounts are recomme		GL:4:1032
xes, taxes collected for the reportin		GL:4:1031
xes Receivable to arrive at net taxes		GL:4:1029
ould be shown in a separate account		GL:4:1023
s. Separate accounts may be maint		GL:4:1021
s. Normally subdivided by the source		GL:4:1010
d be too expensive and time-consum		GL:4:1004
		GL:4:1003
		GL:4:1002
		GL:4:1001
. Interest-bearing accounts are reco		GL:4:1000
nts expended in excess of resource		GL:3:504
s the amount not restricted or compr		GL:3:503
ty. Action must occur prior to year-e		GL:3:502
station.		GL:3:501
roperty held for resale) or amounts th		GL:3:500
uding all improvements and permar		GL:3:210
		GL:3:101
		GL:2:40
		GL:2:35
		GL:2:30

		GL:2:20
		GL:2:10
arged against appropriations during s		GL:1:7
e sheets and is closed at year-end.		GL:1:6
		GL:1:5
s. Appears in a balance sheet prepar		BGL:2:20
n interim financial statements only;		BGL:2:10
nces.		BGL:1:1
tes payable or x		
eived by a district (excluding amount		GL:4:3000
	x	
	x	
s an asset until x		
ff. Use of this acc		
future equipm	x	
	x	
le for appropri	x	
f this account is restricted to long-te		GL:4:1502
life of such bonds.		
efit amounts payable also are included. A separate liability		
tion and for which part of the appropriation is reserved. De		
er the date of issuance.		GL:4:3501
x	x	
ntractual paym	x	
x		GL:4:2450
x	x	GL:4:2511
x	x	
x	x	
x	x	
x	x	
x	x	
x	x	
x	x	
no are consid	x	
e teaching proc	x	
	x	
	x	
	x	
nguage interpre	x	
	x	
	x	
	x	
	x	

	x	
	x	
	x	
announcements	x	
the design and	x	
	x	
if your district	x	
facilities.	x	
	x	
neral operation	x	
ncludes those	x	
is category incl	x	
e with function	x	
etation, and tra	x	
.	x	
	x	
	x	
	x	GL:4:2451
x		OBJ:4:4030
		OBJ:4:2653
, employees, or other persons of the		OBJ:4:2652
40 Operation and Maintenance of Pl		OBJ:4:2651
s awarded against the district. Also		OBJ:4:2650
x		OBJ:4:2640
x		OBJ:4:2622
rance but are of a type that might ha		OBJ:4:2621
x		OBJ:4:2451
ays and sidewalks.		OBJ:4:2450
x		OBJ:4:2440
x		OBJ:4:2430
efined as movable or fixed units of f		OBJ:4:2420
x		OBJ:4:2412
		OBJ:4:2410
x		OBJ:4:2400
x		OBJ:4:2332
x		OBJ:4:2331
x		OBJ:4:2330
x		OBJ:4:2321
		OBJ:4:2320
x		OBJ:4:2313
x		OBJ:4:2312
x		OBJ:4:2311
x		OBJ:4:2310
nditures for rental of shelters for chil		OBJ:4:2304

state field trips, or non-instructional	OBJ:4:2303
structional staff travel is included here	OBJ:4:2301
	OBJ:4:2300
x	OBJ:4:2263
	OBJ:4:2262
	OBJ:4:2261
	OBJ:4:2260
al when operated by district personnel	OBJ:4:2251
	OBJ:4:2250
310 Board of Education Services. M	OBJ:4:2240
cluded would be costs for other reports	OBJ:4:2230
x	OBJ:4:2220
x	OBJ:4:2210
x	OBJ:4:2201
x	OBJ:4:2150
	OBJ:4:2140
	OBJ:4:2130
	OBJ:4:2102
	OBJ:4:2101
	OBJ:4:2100
x	OBJ:4:2052
x	OBJ:4:2051
x	OBJ:4:2050
x	OBJ:4:2043
x	OBJ:4:2040
x	OBJ:4:2031
x	OBJ:4:2030
x	OBJ:4:2020
x	OBJ:4:2011
d trips.	OBJ:4:2284
x	OBJ:4:1410
x	OBJ:3:251
x	OBJ:3:312
x	OBJ:3:262
x	OBJ:3:261
x	OBJ:3:245
x	OBJ:3:242
x	OBJ:3:241
x	OBJ:3:231
x	OBJ:3:228
es contracts and agreements cover	OBJ:3:227
x	OBJ:3:225
x	OBJ:3:221
x	OBJ:3:220

x		OBJ:3:211
x		OBJ:3:210
		OBJ:3:205
who are hired on a temporary or subst		OBJ:3:204
x		OBJ:3:201
x		OBJ:3:200
x		OBJ:3:142
x	x	
x		OBJ:2:31
x		OBJ:2:26
x		OBJ:2:24
sical problems to supplement the te		OBJ:2:2220
x		OBJ:2:22
x		OBJ:2:21
x		OBJ:2:20
x		OBJ:4:2103
x		BOBJ:2:30
x		OBJ:3:404
Actuarial Liab	x	
Actuarial Liab	x	
Actuarial Liab	x	
t 540 Depreciable Equipment for de		OBJ:3:243
erance Tax, an	x	OBJ:4:1523
x		
x	x	
x	x	
x	x	
x		OBJ:4:1420
x	x	
x	x	
x	x	
provided pursuan	x	
x	x	
x	x	OBJ:4:1140
	x	
ve programs er	x	OBJ:3:110
	x	
	x	
	x	
	x	
	x	
	x	
	x	

students to and from school and scho	OBJ:3:111
alternative pro x	
x	
x	
x	
his category would include all sales to adults, the second	
x	
are recorded u x	
x	
x	
x	
x	
x	
x	
x	
ould have had to x	
x	SOUR:3:500
x	SOUR:3:404
x	SOUR:3:403
x	SOUR:3:402
x	SOUR:3:401
x	SOUR:3:400
x	SOUR:2:20
x	SOUR:2:10
x	SOUR:1:4
x	SOUR:1:3
x	OBJ:4:3007
x	OBJ:4:1522
x	OBJ:4:1521
x	OBJ:4:1520
x	OBJ:4:1513
x	OBJ:4:1512
x	OBJ:4:1511
x	OBJ:4:1510
x	OBJ:4:1509
x	OBJ:4:1507
x	OBJ:4:1506
x	OBJ:4:1505
x	OBJ:4:1504
x	OBJ:4:1503
x	OBJ:4:1502
x	OBJ:4:1501
x	OBJ:4:1500
x	OBJ:4:1430

X		OBJ:4:1238
X		OBJ:4:1222
X		OBJ:4:1220
X		OBJ:4:1201
X		
X		OBJ:4:1112
X		OBJ:4:1111
X		OBJ:4:1110
X		OBJ:4:1103
X		OBJ:4:1102
X		OBJ:4:1101
X		OBJ:4:1100
X		OBJ:4:1031
charged on delinquent local option t		OBJ:4:1030
X		OBJ:4:1020
		OBJ:4:1011
istrict which, within legal limits, is th		OBJ:4:1010
		OBJ:4:1001
within legal limits, is the final autho		OBJ:4:1000
X		OBJ:3:400
X		OBJ:3:152
X		OBJ:3:151
X		OBJ:2:14
X		OBJ:3:123
X		OBJ:3:131
X		OBJ:3:122
X		OBJ:3:121
X		OBJ:3:120
X		OBJ:3:112
vided in the district. (When tabulatin		OBJ:2:11
X		OBJ:3:103
X		OBJ:3:101
X		OBJ:3:100
X		OBJ:2:30
e common benefit.		OBJ:2:10
X		OBJ:1:3
X		GRANT:3:9999
X		OBJ:3:310
vings accounts; time certificates of		OBJ:3:140
ds over cost or other basis at date of		OBJ:3:141
by the U.S. Department of Agriculture. Federal reimbursem		
gram.		GRANT:4:2104
Program.		GRANT:4:2103
		GRANT:4:2101

dered special functions. Some exam		OBJ:4:1212
		OBJ:4:1240
		OBJ:4:1120
		SOUR:3:101
t restriction. Separate accounts ma		OBJ:3:150
	x	
	x	
ged on delinqu	x	
red by the district without restriction.		
fic purpose.	x	
		OBJ:4:3000
		OBJ:4:3001
		OBJ:4:2006
		OBJ:4:3004
		OBJ:4:3002
		OBJ:4:3003

Notes
This is a Program Dimention
This is a Program Dimention
Moved to Program Dimention
Moved to Program Dimention
Moved to Program Dimention
Moved to Program Dimention
This is a Program
Rolls up to PROG:2:82
Rolls up to CURR:2:24
Roll up to specific in program dimension
Grant no longer active
Moved to Curriculum dimension
Moved to Curriculum dimension
Moved to Curriculum dimension
Moved to Curriculum dimension
Moved to Curriculum dimension
Moved to Curriculum dimension
Moved to Curriculum
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Moved to Curriculum
Moved to Curriculum
Moved to Curriculum
Moved to Curriculum
Can be rolled up into CURR:2:255
Can be rolled up into CURR:2:255
Can be rolled up into CURR:2:255
Moved to Program Dimention
Moved to Program Dimention
Moved to Program Dimention
Moved to Program Dimension
Moved to Program Dimension
Moved to Program Dimension
Using roll up function code 1220

Moved to Budget Object Structure
Rolls up to PROG:2:35 - track specific grant activities in grant dimension
Removed, not rolling up in the same way - more detail added
Rolls up to PROG:2:24 and GRADE:2:30
Use program dimension to code specific programs
Use function dimension to code specific services
Rolls up to FUCT:3:243
Use function dimension to code specific services
No longer using this rollup for programs (each defined more specifically)
Rolls up to PROG:4:2003
Rolls up to PROG:4:2003
Use specific program dimension code
Rolls up to PROG:3:402, this is a vendor profile not captured in the coding system
Rolls up to PROG:3:402, this is a vendor profile not captured in the coding system
Need
Rolls up to PROG:3:402, this is a vendor profile not captured in the coding system
No longer using this rollup for programs (each defined more specifically)
Use code OBJ:2:81 and GRADE:1:1
Use code OBJ:2:81 and GRADE:1:2
Use code OBJ:2:81 and GRADE:1:3
Rolls up to PROG:3:810
Rolls up into FUNCT:3:200
Rolls up into FUNCT:3:200
Rolls up into FUNCT:3:200
Rolls up into FUNCT:3:200
Rolls up into FUNCT:3:200
Rolls up to FUNCT:3:201
Rolls up to FUNCT:3:201
Rolls up to FUNCT:3:201
Rolls up to FUNCT:3:201
Rolls up to FUNCT:3:201
Rolls up to FUNCT:3:201
Rolls up to FUNCT:3:201
Rolls up to FUNCT:3:202
Rolls up to FUNCT:3:202
Rolls up to FUNCT:3:202
Rolls up to FUNCT:3:202
Rolls up to FUNCT:3:202
Rolls up to FUNCT:3:203
Rolls up to FUNCT:3:203
Rolls up to FUNCT:3:203
Rolls up to FUNCT:3:203

Rolls up to FUNCT:3:203
Rolls up to FUNCT:3:204
Rolls up to FUNCT:3:204
Rolls up to FUNCT:3:204
Rolls up to FUNCT:3:204
Rolls up to FUNCT:3:213
Rolls up to FUNCT:3:213
Rolls up to FUNCT:3:213
Rolls up to FUNCT:3:213
Rolls up to FUNCT:3:211
Rolls up to FUNCT:3:211
Rolls up to FUNCT:3:211
Rolls up to FUNCT:3:211
Rolls up to FUNCT:3:211
Reduced a level, rolls up into FUNCT:1:2
Rolls up into FUNCT:3:221
Rolls up into FUNCT:3:221
Rolls up into FUNCT:3:240
Rolls up into FUNCT:3:240
Rolls up into FUNCT:3:240
Rolls up into FUNCT:3:240
Rolls up into FUNCT:3:240
Rolls up into FUNCT:3:240
Rolls up into FUNCT:3:240
Rolls up into FUNCT:3:240
Rolls up into FUNCT:3:240
Rolls up into FUNCT:3:240
Rolls up into FUNCT:3:251
Rolls up into FUNCT:3:251
Rolls up into FUNCT:3:251
Rolls up into FUNCT:3:251
Rolls up into FUNCT:3:251
Rolls up into FUNCT:3:252
Rolls up into FUNCT:3:252
Rolls up into FUNCT:3:254
Rolls up into FUNCT:3:254
Rolls up into FUNCT:3:254
Rolls up into FUNCT:3:254
Rolls up into FUNCT:3:254
Rolls up into FUNCT:3:242
Rolls up into FUNCT:3:242
Rolls up into FUNCT:3:242
Rolls up into FUNCT:3:242
Rolls up into FUNCT:3:242

Rolls up into FUNCT:3:242
Rolls up into FUNCT:3:242
Rolls up into FUNCT:3:243
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Rolls up into FUNCT:3:243
Rolls up into FUNCT:3:243
Rolls up into FUNCT:3:244
Rolls up into FUNCT:3:244
Rolls up into FUNCT:3:244
Rolls up into FUNCT:3:244
Rolls up into FUNCT:3:245
Rolls up into FUNCT:3:245
Rolls up into FUNCT:3:245
Rolls up into FUNCT:3:245
Code as specific service in function dimension
Removed from function, in object
Moved to Source Dimension
Moved to Grant Dimension
Moved to Grant Dimension
Moved and re-organized in source dimension
Moved and re-organized in source dimension
Rolls up to GL:4:1032
Rolls up to GL:4:1514
Rolls up to GL:4:1040
Rolls up into GL:4:3000 or GL:4:3001
Rolls up into GL:4:3000 or GL:4:3001
Rolls up into GL:4:3000 or GL:4:3001
Rolls up into GL:4:3030

Moved to Budget GL Dimension
Rolls up into GL:4:3030
Rolls up to GL:4:3030
Rolls up to GL:4:1515
Rolls up into GL:4:1023
Simplifying codes
Rolls up into OBJ:4:5070
Rolls up into OBJ:4:5070
No longer using this rollup for fund balance (each defined more specifically)
Need
Need
Need
Rolls up into OBJ:4:2220
Combined into debt service at level 2
Rolls up to OBJ:4:2220
Rolls up to OBJ:4:2220
Rolls up into OBJ:4:1100
Rolls up into OBJ:3:213 and OBJ:3:214
Need
Rolls up to OBJ:4:1103
OBJ:3:3103 or OBJ:3:3113
OBJ:3:3120 or OBJ:3:3121
Re-organized, now OBJ:3:200-203
Rolls up into OBJ:4:2210
Rolls up into OBJ:4:2220
Rolls up into OBJ:4:2220
Rolls up into OBJ:4:2220
Rolls up into OBJ:4:2220
Rolls up into OBJ:3:226
Rolls up into OBJ:3:226
Rolls up into OBJ:4:2283 or OBJ:4:2284
Rolls up into OBJ:4:2283 or OBJ:4:2284

Code in object dimension and intermediate revenues in source dimension
Code as specific tax in object dimension and intermediate revenues in source dimension
Code as specific tax in object dimension and intermediate revenues in source dimension
Code as specific tax in object dimension and intermediate revenues in source dimension
Code as OBJ:3:150 in object dimension and state revenues in source dimension
Code in object dimension and state revenues in source dimension

GAAP Fund Type No and Name	GAAP Fund Category No and Name	Fund Class No and Name	GAAP Fund Class Definition
1 Governmental	10 General Fund	100 General Fund	General Fund accounts for all financial resources of the districts except those required to be accounted for in another fund. Special Revenue Funds account for the proceeds of specific revenue sources (other than expendable trusts or major capital projects) that are legally restricted to expenditure for specified purposes. Some examples of special revenue funds might include: restricted state or federal grants-in aid; restricted tax levies. A separate fund may be used for each restricted source or one fund may be used, supplemented by the dimension project/reporting code; e.g., bus replacement fund. Food Service and Student Body Funds should be classified here. Used to hold resources earmarked from the SSF to support depreciation of school buses. Debt Service Funds account for the accumulation of resources for, and the payment of, general long-term debt, principal and interest.
	20 Special Revenue Fund	200 Special Revenue Fund 201 Transportation - SSF	
	30 Debt Service Fund	300 Debt Service Fund	
	40 Capital Projects Fund	400 Capital Projects Fund	Capital Project Funds account for financial resources used to acquire or construct major capital facilities (other than those of proprietary funds and trust funds). The most common source of revenue in this fund would be the sale of bonds. A separate fund may be used for each capital project or one fund may be used, supplemented by the dimension project/reporting code.
	50 Permanent Fund	500 Permanent Fund	Permanent Funds are used to account for resources that are legally restricted to the extent that only earnings, and not principal, may be used for purposes that support the reporting government's programs. For school districts, this might include endowments or other funds where the principal is preserved and only the investment earnings are used to support educational programs.
2 Proprietary Fund	60 Enterprise Fund	600 Enterprise Fund	Enterprise Funds are used to account for operations that are financed and operated in a manner similar to private business enterprises. The intent is that the costs of providing goods or services to the general public on a continuing basis are financed or recovered primarily through user charges. For school districts, this might include activities such as food services, community education programs, or other services where fees are charged to external users.
	61 Internal Service Fund	610 Internal Service Fund	Internal Service Funds are a type of Proprietary Fund used to account for the financing of goods or services provided by one department or agency to other departments or agencies of the government, or to other governments, on a cost-reimbursement basis. Examples include central purchasing, printing services, and information technology support. Private Purpose Trust Funds are used to account for trust arrangements under which principal and income benefit individuals, private organizations, or other governments. For school districts, these funds might include scholarships or other funds where the resources are legally restricted to a specific purpose.
3 Fiduciary Fund	70 Private Purpose Trust	700 Private Purpose Trust	Pension and Employee Benefit Trust Funds are used to account for resources that are required to be held in trust for the members and beneficiaries of defined benefit pension plans, defined contribution plans, other post-employment benefit plans, or other employee benefit plans. For school districts, this includes funds set aside for employee pensions and other post-employment benefits (OPEB).
	71 Pension and Employee Benefit Trust Funds	710 Pension and Employee Benefit Trust Funds	
	72 Investment Trust Funds	720 Investment Trust Funds	Investment Trust Funds are used to account for the external portion of investment pools reported by the sponsoring government. For school districts, this might include funds invested on behalf of other entities or individuals.
	73 Custodial Funds	730 Custodial Funds	Agency funds are used to account for resources held by the government in a purely custodial capacity. These funds typically involve the receipt, temporary investment, and remittance of fiduciary resources to individuals, private organizations, or other governments. For school districts, this might include funds held for student activities or other pass-through funds.
4 Government Wide Reporting Fund	80 Government Wide Reporting Fund	800 Government Wide Reporting Fund	The Government-Wide Reporting Fund (GWRF) is an internal reporting mechanism used to record conversion entries that transition governmental fund activity from modified accrual to accrual basis for GASB-required government-wide statements.

Account	Account Name	Account Description	Account Type	Account Balance	Account Details
1000	Assets	Assets	1000	1000	Assets
1010	Current Assets	Current Assets	1010	1010	Current Assets
1011	Cash	Cash	1011	1011	Cash
1012	Accounts Receivable	Accounts Receivable	1012	1012	Accounts Receivable
1013	Inventory	Inventory	1013	1013	Inventory
1014	Prepaid Expenses	Prepaid Expenses	1014	1014	Prepaid Expenses
1015	Other Current Assets	Other Current Assets	1015	1015	Other Current Assets
1020	Non-current Assets	Non-current Assets	1020	1020	Non-current Assets
1021	Property, Plant, and Equipment	Property, Plant, and Equipment	1021	1021	Property, Plant, and Equipment
1022	Intangible Assets	Intangible Assets	1022	1022	Intangible Assets
1023	Other Non-current Assets	Other Non-current Assets	1023	1023	Other Non-current Assets
2000	Liabilities	Liabilities	2000	2000	Liabilities
2010	Current Liabilities	Current Liabilities	2010	2010	Current Liabilities
2011	Accounts Payable	Accounts Payable	2011	2011	Accounts Payable
2012	Short-term Debt	Short-term Debt	2012	2012	Short-term Debt
2013	Other Current Liabilities	Other Current Liabilities	2013	2013	Other Current Liabilities
2020	Non-current Liabilities	Non-current Liabilities	2020	2020	Non-current Liabilities
2021	Long-term Debt	Long-term Debt	2021	2021	Long-term Debt
2022	Other Non-current Liabilities	Other Non-current Liabilities	2022	2022	Other Non-current Liabilities
3000	Equity	Equity	3000	3000	Equity
3010	Common Stock	Common Stock	3010	3010	Common Stock
3020	Retained Earnings	Retained Earnings	3020	3020	Retained Earnings
3030	Other Equity	Other Equity	3030	3030	Other Equity
4000	Income Statement	Income Statement	4000	4000	Income Statement
4010	Revenue	Revenue	4010	4010	Revenue
4020	Cost of Goods Sold	Cost of Goods Sold	4020	4020	Cost of Goods Sold
4030	Operating Expenses	Operating Expenses	4030	4030	Operating Expenses
4040	Other Expenses	Other Expenses	4040	4040	Other Expenses
5000	Balance Sheet	Balance Sheet	5000	5000	Balance Sheet
5010	Assets	Assets	5010	5010	Assets
5020	Liabilities	Liabilities	5020	5020	Liabilities
5030	Equity	Equity	5030	5030	Equity
6000	Income Statement	Income Statement	6000	6000	Income Statement
6010	Revenue	Revenue	6010	6010	Revenue
6020	Cost of Goods Sold	Cost of Goods Sold	6020	6020	Cost of Goods Sold
6030	Operating Expenses	Operating Expenses	6030	6030	Operating Expenses
6040	Other Expenses	Other Expenses	6040	6040	Other Expenses
7000	Balance Sheet	Balance Sheet	7000	7000	Balance Sheet
7010	Assets	Assets	7010	7010	Assets
7020	Liabilities	Liabilities	7020	7020	Liabilities
7030	Equity	Equity	7030	7030	Equity
8000	Income Statement	Income Statement	8000	8000	Income Statement
8010	Revenue	Revenue	8010	8010	Revenue
8020	Cost of Goods Sold	Cost of Goods Sold	8020	8020	Cost of Goods Sold
8030	Operating Expenses	Operating Expenses	8030	8030	Operating Expenses
8040	Other Expenses	Other Expenses	8040	8040	Other Expenses
9000	Balance Sheet	Balance Sheet	9000	9000	Balance Sheet
9010	Assets	Assets	9010	9010	Assets
9020	Liabilities	Liabilities	9020	9020	Liabilities
9030	Equity	Equity	9030	9030	Equity

Accounted for and integrated into the consolidated financial statements.

Accounted for and integrated into the consolidated financial statements.

Accounted for and integrated into the consolidated financial statements.

Accounted for and integrated into the consolidated financial statements.

Function Type No and Name	Function Category No and Name	Function Class No and Name	Function Class Definition
1 Instruction	10 Instruction	100 Instruction	Direct teaching and learning activities in any setting or medium; includes instructional assistants and teacher travel tied to instruction.
2 Support Services	20 Support Services – Students	200 Attendance & Social Work Services	Improve attendance; resolve home-school-community issues; home-school admin; drug/alcohol programs.
		201 Guidance Services	Counseling, college/career planning, referrals, and program coordination.
		202 Health Services	Medical, dental, nursing, and mental-health services not part of direct instruction.
		203 Psychological Services	Testing, evaluation, counseling, and management of psychological services.
		204 Speech Pathology & Audiology	Identify, assess, and treat speech, hearing, and language impairments.
		205 Therapeutic & Adaptive Services	OT, PT, adaptive PE, and related therapies.
		206 Student Support Services Management	Direction/management of special ed, ELL, and other student support programs.
	21 Support Services – Instruction	210 Improvement of Instruction	Planning, development, and evaluation to improve instruction.
		211 Educational Media Services	Library/media centers; instructional resources (hardware, software, print/digital).
		212 Student Achievement Assessment	Measuring and monitoring student progress toward goals.
		213 Instructional Staff Development	Professional learning for instructional staff.
	22 Support Services – General Administration	220 Board of Education	School board operations, policy, elections, legal.
		221 Executive Administration	Districtwide executive leadership (superintendent/cabinet).
	23 Support Services – School Administration	230 Office of the Principal Services	School-level administration (principals, assistants, clerical).
		231 Other School Administration	School administration not classified above.
	24 Support Services – Central Services	240 Fiscal Services	Budgeting, accounting, payroll, auditing, and financial management.
		241 Central Support Services Management	Direction/coordination of central services.
		242 Planning, Research, Evaluation & Grants	Systemwide planning, research, evaluation, and grant writing.
		243 Information Services	Communications, publications, translation services, and public information.
		244 Staff Services (HR)	Recruiting, placement, transfers, HR, staff health/accounting.
		245 Technology Services	IT management, networking, data processing, SIS.
		246 Records Management	Records retention and disposal.
	25 Support Services – Business	250 Business Support Management	Direction/management of business operations.
		251 Operation & Maintenance	Custodial, utilities, repairs; safe, operable facilities/grounds.
		252 Student Transportation	Transport between home, school, and activities; related insurance.
		253 Alternative Transportation	Walking/cycling/public transit or other approved alternatives (HB 3014).
		254 Internal Services	Purchasing, warehousing, duplicating, printing.
3 Noninstructional Services	30 Food Services	300 Food Service Direction	Management of nutrition programs.
		301 Food Preparation	Preparing meals and food.
		302 Food Delivery	Serving and delivering meals.
	31 Enterprise Services	310 Enterprise Direction	Management of self-supporting, fee-based operations (non-food).
		311 Enterprise Preparation	Preparing enterprise goods/services.
		312 Enterprise Delivery	Delivering enterprise goods/services.
	32 Community Services	320 Community Services Management	Oversight of community programs (childcare, custodial care, etc.).
		321 Community Recreation	Recreation programs for the community.
		322 Civic Services	Civic activities, PTA/lectures/forums.
		323 Public Library Services	Public/community library services.
		324 Welfare Activities Services	Personal-needs assistance (stipends, clothing, etc.).
		325 Nonpublic School Services	Services to nonpublic school students (instruction, transport, health, social work).
		326 Other Community Services	Community programs not otherwise classified; may include scholarships.
	33 Custody and Care of Children Services	330 Custody & Care Services	Custodial/day or residential care not tied to instruction.
4 Facilities Acquisition and Construction	40 Facilities Acquisition & Construction Services	400 Facilities Management	Direction/management of facilities acquisition and construction.
		401 Site Acquisition & Development	Land/site purchase and development.
		402 Land Improvements	Grading, utilities, fencing, and similar site improvements.
		403 Building Acquisition/Construction	Purchase, construction, or major improvements to buildings.
		404 Equipment Acquisition	Major equipment (furniture, vehicles, large systems).
		405 Technology Acquisition	Technology infrastructure and large-scale systems.
		406 Other Capital Items	Capital items eligible for bonding not elsewhere classified.
		407 Other Construction Services	Facilities/construction activities not otherwise classified.
5 Debt Service	50 Debt Service Payments	500 Debt Service Payments	Principal on bonds and other long-term debt.
	51 Interest Payments	510 Interest Payments	Interest on bonds and other debt instruments.
	52 Other Debt-Related Expenditures	520 Other Debt-Related Expenditures	Issuance, refinancing, and fiscal agent fees.
6 Other Uses/Transfers	60 Interfund Transfers	600 Interfund Transfers	Transfers between funds (non-expenditure at consolidated level).
	61 Payments to Other Governments	610 Payments to Other Governments	Payments to other districts, ESDs, or government entities.
	62 Debt-Related Transfers	620 Debt-Related Transfers	Transfers tied to refinancing or debt restructuring.
	64 Apportionments/Pass-Throughs	640 Apportionments/Pass-Throughs	Funds passed through under statute, contract, or grant terms.
	65 Other Nonoperational Uses	650 Other Nonoperational Uses	Noninstructional, nonoperational uses not otherwise defined.

Source Type No and Name	Source Cat No and Name	Source Class No and Name	Source Class Definition
1 Local Sources	10 Local Sources	100 Local Taxes	Property taxes levied under the district's permanent rate and voter-authorized taxes, excluding local option levies
		101 Other Local Revenue	This category includes all other local revenues not covered by property taxes, such as fees for services, rentals, and donations.
2 Intermediate Sources	20 Intermediate Sources	200 Intermediate Revenue	Funds received from entities that are between the state and local levels, such as county governments or regional education service districts. These funds often come in the form of grants or shared revenues.
3 State Sources	30 State School Fund	300 State School Fund	The State School Fund is the primary source of unrestricted state funding for school districts, distributed based on a formula that considers factors like student enrollment and district characteristics.
	31 Targeted State Grants	310 Targeted State Grants	Funds provided by the state for restricted purposes, such as special education, career and technical education, early learning, nutrition, or technology improvements.
	32 State Capital Bonds	320 State Capital Bonds	Capital bonds are funds raised through the issuance of bonds for capital projects, such as building new schools or renovating existing facilities.
	33 Miscellaneous State Sources	330 Miscellaneous State Sources	This category includes all other state revenues not covered by the State School Fund or specific grants, such as state reimbursements and other state aid.
4 Federal Sources	40 Federal Sources	400 Direct Unrestricted	Funds received directly from the U.S. Department of Education or other federal agencies without usage restrictions (available for general educational purposes).
		401 Pass-through Unrestricted	Federal funds passed through the state without usage restrictions (e.g., Title VI Rural Education).
		402 Direct Restricted	Funds received directly from the U.S. Department of Education or other federal agencies with usage restrictions (e.g., Department of Defense STEM grants).
		403 Pass-through Restricted	Federal funds with usage restrictions that are passed through the state education agency to the district (e.g., IDEA, Title I).
		404 Pass-through Restricted (Other Intermediate)	Federal funds with usage restrictions that are passed through an intermediary such as an ESD or consortium lead district, rather than the state education agency.
5 Other Sources	50 Miscellaneous Revenues	500 Miscellaneous Revenues	Includes sale of assets, insurance recoveries, settlements, and other revenues not classified elsewhere. Excludes interfund transfers, which are recorded in 5200.
	51 Interfund Transfers	501 Operating Transfers	These are legally authorized, nonreciprocal movements of money to support operating or capital needs of another fund. They are reported as 'Other Financing Sources/Uses' rather than revenues or expenditures.

Obj Type No and Name	Object Cat No and Name	Object Class No and Name	Object Detail No and Name	Object Detail Definition		
1 Resources / Additions	10 Taxes	100 Ad Valorem Taxes	1000 Ad Valorem Taxes - Current Year	Collections of current-year ad valorem (property) tax levies.		
		101 Local Option Taxes	1010 Local Option - Current Year	Collections of current-year voter-approved local option levy assessments.		
		102 Excise / Construction Taxes	1020 Construction Excise Tax	Receipts from local construction excise taxes assessed on new development.		
		103 Penalties, Interest, and Other Taxes	1030 Tax Penalties & Interest	Interest and penalties earned on delinquent property and other taxes.		
		11 Tuition & Fees	110 Tuition	1100 Tuition - Individuals (in-district)	Payments from district residents for instructional services.	
			111 Transportation Fees	1110 Transportation - Individuals	Fees charged to families for student transportation services.	
			112 Student Activity Fees	1120 Student activity fees	Revenues from athletics, clubs, and student body activities (non-fiduciary).	
			113 Fines & Forfeitures	1130 Fines & Forfeitures	Revenues from fines and forfeitures (e.g., library, parking).	
			114 Fees Collected for Others	1140 Fees Collected for Others	Amounts collected and remitted to outside organizations; pass-throughs.	
			120 Community Services Sales	1200 Childcare / Preschool Fees	Tuition and fees for preschool, daycare, and after-school care.	
		12 Services & Sales	121 Food Sales	1210 Food Sales - Student Meals	Paid student lunches, breakfasts, and à la carte items.	
			122 Rentals & Leases	1220 Rentals - Facilities	Income from renting district buildings or facilities.	
			123 Fee Revenue from Districts	1230 Staff Training & Professional Development Fees	Revenues from workshops, seminars, and in-service training the district provides.	
			124 Other Sales	1240 Other Sales	Bookstore, etc.	
			13 Contributions & Donations	130 Contributed Capital	1300 Contributed Capital	Non-exchange contributions of capital assets or resources for capital purposes.
				131 Gifts / Donations	1310 Donations from private sources	Voluntary contributions from individuals or organizations (non-capital).
				132 Fundraising Revenue	1320 Fundraising - student clubs	Revenues from student-organized fundraising activities.
				140 Interest Earnings	1400 Interest on investments	Interest earnings on bank deposits and investments.
			14 Investments & Miscellaneous	141 Investment Gains / Losses	1410 Investment gains (realized)	Realized gains from the sale or redemption of investments.
				142 Indirect Cost Recovery	1420 Grant Indirect Revenue	Recoveries of allowable indirect costs from grants and similar awards.
		143 Miscellaneous Revenues		1430 Recovery of Prior Years' Expenditure	Reimbursement of expenditures recognized in a prior fiscal year.	
		150 Unrestricted Revenue		1500 County School Funds	Revenue distributed from county school funds.	
		15 Intergovernmental Revenues	151 Restricted Grants-In-Aid	1514 Operating Grants	Operating grants restricted to specific purposes.	
			152 Revenue in Lieu of Taxes	1520 Federal Forest Fees	Receipts under federal programs distributing forest revenues.	
			200 Licensed Salaries - Teachers	2000 Licensed Salaries - Teachers	2000 Licensed Salaries - Teachers	Gross pay for licensed teaching staff.
				201 Classified Salaries	2010 Classified Salaries - Instructional Aides	Gross pay for classified instructional aides/paraprofessionals.
				202 Administrators	2020 Administrator Salaries	Gross pay for administrators.
				203 Substitutes	2030 Licensed Salaries - Substitutes	Gross pay for licensed substitute employees.
		204 Temporary Salaries	2040 Temporary Salaries - Teachers	Temporary or seasonal salaries for teachers.		
		205 Other Salary	2050 Overtime Salaries	Overtime compensation for eligible employees.		
		21 Benefits	210 PERS Contributions	2100 Employer PERS Tier I/II	Employer retirement contributions for PERS Tier I/II plans.	
			211 Social Security / Medicare	2110 FICA (employer)	Employer Social Security and Medicare contributions.	
			212 Health Insurance	2120 Health insurance - medical	Employer share of medical insurance premiums.	
			213 Workers' Compensation	2130 Workers' compensation	Premiums for workers' compensation coverage.	
			214 Unemployment Compensation	2140 Unemployment compensation	Employer unemployment insurance contributions and charges.	
			215 Retirement Stipends	2150 Supplemental retirement stipends	Stipends or incentives paid at or after retirement.	
		22 Services	220 Other Postemployment Benefits (OPEB)	2200 OPEB contributions	Employer contributions for other post-employment benefits (OPEB).	
			221 Instructional Prof Services	2210 Instructional services - contracted	Contracted instructional services (tutors, trainers, providers).	
			222 Non-Instructional Prof Services	2220 Professional services - non-instructional	Professional/technical services (IT, HR, business, consulting).	
			223 Audit Services	2230 Audit services	Independent financial and/or compliance audit services.	
			224 Legal Services	2240 Legal services	Legal counsel and related legal services.	
			225 Property Services	2250 Cleaning services	Contracted janitorial and cleaning services.	
			226 Utilities	2260 Electricity	Electric utility costs.	
			227 Repairs & Maintenance	2270 Repairs & maintenance - buildings	Building repairs and maintenance services.	
			228 Travel	2280 Travel - local (in-district)	Local mileage, parking, and incidental travel within the district.	
			23 Supplies & Materials	230 Instructional Supplies	2300 Instructional supplies - general	Consumable classroom and instructional supplies.
231 Technology Supplies	2310 Technology hardware (<\$10k)	Non-capitalized technology hardware and peripherals.				
232 Other Supplies	2320 Office Supplies	Paper, pens, binders, and other office supplies.				
240 Land	2400 Land acquisitions	Purchase of land parcels and related acquisition costs.				
241 Buildings	2410 Buildings	Acquisition or construction of buildings meeting capitalization thresholds.				
242 Equipment (non-vehicle)	2420 Equipment - non-technology	Capital equipment excluding technology and vehicles.				
24 Capital Outlay	243 Vehicles / Buses	2430 Bus Improvements	Capital improvements to buses (e.g., retrofits).			
	244 Capitalized Technology	2440 Technology (capital)	Capitalized technology purchases (hardware/software at or above threshold).			
	245 Other Capital Assets	2450 Site improvements	Capital site improvements other than buildings (e.g., paving, fencing).			
	250 Principal on Long-term Debt	2500 Principal - bonds	Repayment of bond principal.			
	251 Interest on Long-term Debt	2510 Interest - bonds	Interest expense on bonds.			
	252 Other Debt Service Costs	2520 Issuance costs	Underwriter, legal, and other costs of issuing debt.			
26 Other Objects	260 Amortization - Right-to-use Assets (SBITA/leases)	2600 Amortization - SBITA	Amortization of right-to-use subscription-based IT arrangement assets (GASB 96).			
	261 Dues & Fees	2610 Dues	Professional memberships and association dues.			
	262 Judgments & Settlements	2620 Fees (licenses/permits/testing)	Licenses, permits, testing, and similar fees.			
	263 Indirect Charges	2630 Indirect charges	Charges allocated internally (e.g., central service cost allocation).			
	264 Unrecoverable Bad Debt Write-Off	2640 Unrecoverable Bad Debt Write-Off	Write-off of uncollectible receivables (including SBITA-related).			
	265 Insurance Premiums	2650 Liability insurance	General liability insurance premiums.			
	266 Insurance Claims	2660 Claims Paid	Benefits or claims paid to claimants (self-insurance/costual).			
	267 Special Inflows/Outflows	2670 Special Inflows/Outflows	Items within management's control that are unusual or infrequent (classified per GASB).			
	268 Scholarship Awards	2680 Scholarship Awards	Scholarships awarded from private-purpose trust funds.			
	269 Benefit Payments (Trust)	2690 Benefit Payments (Trust)	Benefit payments to participants/beneficiaries of pension/OPEB or other trust arrangements.			
	270 Administrative Expenses	2700 Administrative Expenses	Administrative expenses of fiduciary funds, including trustee fees.			
	271 Distributions to Other Governments	2710 Distributions to Other Governments	Remittances of amounts collected for other governments.			
27 Refunds of Collections	272 Refunds of Collections	2720 Refunds of Collections	Refunds of amounts previously collected in a custodial capacity.			
	273 Contingency / Planned Reserve	2730 Contingency / Planned Reserve	Budgeted reserve for unforeseen expenditures.			
	3000 Bond proceeds - new issuance	3000 Bond proceeds - new issuance	Proceeds from the sale of newly issued bonds.			
	3100 Transfers in - Operating	3100 Transfers in - Operating	Operating transfers received from other funds.			
31 Transfers	311 Transfers Out	3110 Transfers out - Operating	Operating transfers to other funds.			
	312 Transits	3120 Transits - Cash	Transit cash flows recognized as other financing sources/uses.			
	4000 Beginning Fund Balance	4000 Beginning Fund Balance - restricted	Beginning fund balance restricted by law, regulation, or contract.			
	4010 Net Position Beginning of Year	4010 Net Position Beginning of Year	Beginning net position (government-wide or proprietary statements).			
4 Adjustments, Fund Balance, Reserves & Net Position	402 Prior Period Adjustments	4020 Prior period - error correction	Adjustments to correct an error from a prior fiscal year.			
	403 Unappropriated Ending Fund Balance	4030 Unappropriated Ending Fund Balance	Only used for budget			
	404 Cumulative Effect of Changes	4040 Cumulative Effect of Change in Accounting Principles	Cumulative effect recognized for changes in accounting principles.			

Program Type No and Name	Program Cat No and Name	Program Class No and Name	Program Detail No and Name	Program Detail Definition		
1 General Instruction	10 General Instruction	100 General Instruction	1000 Core Academic Instruction	Instruction in core subjects (ELA, math, science, social studies) for the general student population.		
			1001 Elective Instruction	Instruction in electives such as art, music, PE, world language, technology, or career exploration.		
			1002 Advanced Academic Programs	Programs that extend/accelerate general curriculum for high-achieving students.		
2 Special Education	20 Special Education – School Age	200 Instructional Services	1003 General Ed Intervention Support	Supplemental support to address skill gaps for the general student population.		
			2000 Resource Room Instruction	Pull-out instructional support for students with disabilities in a small-group setting.		
			2001 Inclusion Support	Instruction delivered within the general education classroom with accommodations or co-teaching.		
			2002 Self-Contained Classroom Instruction	Specialized instruction for students whose needs require a separate classroom.		
			2003 Transition Skills Instruction	Instruction supporting post-secondary, vocational, or independent-living skills.		
		201 Related Services	2010 Speech-Language Therapy	Direct speech and language services for eligible students.		
			2011 Occupational Therapy	Services addressing fine-motor, sensory, or daily-living skills.		
			2012 Physical Therapy	Services addressing gross-motor skills and mobility.		
			2013 Counseling & Psychological Services	Individual/group counseling, behavior supports, and related assessments.		
			2014 Specialized Transportation	Transportation required for students to access special education services.		
		202 Early Childhood Special Education	2020 ECSE – Resource/Integrated	Preschool special education provided in integrated/resource settings.		
			2021 ECSE – Self-Contained	Preschool special education provided in separate classrooms.		
			2022 ECSE – Itinerant Services	Preschool services delivered in community, childcare, or home settings.		
		203 Extended School Year	2030 ESY – Academics	Extended School Year academic instruction to meet IEP goals.		
			2031 ESY – Related Services	ESY delivery of required related services (e.g., speech, OT, PT).		
		204 Parent & Family Engagement	2040 Parent Training	Training that equips families to support IEP implementation and student progress.		
			2041 Family Engagement Activities	Meetings, workshops, and collaboration activities that increase family participation.		
		21 Special Education – Preschool	210 Preschool Services	2100 IDEA Preschool – Academic	Instructional services for students ages 3–5 funded under IDEA 619.	
				2101 IDEA Preschool – Related Services	Related services (e.g., speech/OT/PT) funded under IDEA 619.	
		3 Targeted Student Support	30 Academic Interventions	300 Remediation Services	3000 Literacy Remediation	Targeted reading interventions outside of core instruction.
					3001 Math Remediation	Targeted math interventions outside of core instruction.
301 Coordinated Early Intervening Services (CEIS)	3010 CEIS – Academic Supports			Early academic supports for non-IDEA students at risk.		
	3011 CEIS – Behavioral Supports			Early behavioral supports for non-IDEA students at risk.		
302 Targeted Interventions	3020 Small-Group Interventions			Standards-aligned small-group academic/behavior interventions.		
	3021 One-to-One Interventions			Individualized academic/behavior interventions.		
40 Remediation & Alternative Programs	400 Remediation			4000 Remediation	Academic remediation programs to address student learning gaps.	
	401 Custody and Care of Children			4010 Custody and Care of Children	Services providing temporary care and supervision of children outside of regular instruction.	
	402 Alternative Education			4020 Home/Hospital Instruction	Instruction provided at a student's home or hospital by district staff.	
				4021 Teen Parent Education Program	Instruction provided to students who are pregnant or parenting, often including on-site child care and life skills training.	
				4022 Juvenile Detention Education	Instruction provided to students housed in juvenile detention or correctional facilities.	
				4023 Alternative School / Credit Recovery	District-sponsored alternative education programs, including credit recovery, re-engagement programs, or nontraditional settings.	
31 Targeted Assistance Programs	310 Targeted Assistance			3100 Title I Reading Support	Targeted reading assistance for identified Title I students.	
				3101 Title I Math Support	Targeted math assistance for identified Title I students.	
	311 Schoolwide Programs			3110 Title I Schoolwide – Reading	Schoolwide reading supports within Title I schoolwide campuses.	
				3111 Title I Schoolwide – Math	Schoolwide math supports within Title I schoolwide campuses.	
	312 Parent & Family Engagement (Title I)			3120 Parent Involvement Workshops	Title I-funded workshops that build family capacity to support learning.	
				3121 Family-School Engagement Events	Title I activities that increase family participation and communication.	
32 Migrant Education	320 Instructional Services			3200 Migrant Academic Instruction	Supplemental ELA, math, science, and social studies instruction for migrant students.	
	321 Summer & Intersession			3210 Migrant Summer Instruction	Academic summer programming for migrant students.	
	322 Identification, Recruitment & Support			3220 ID&R Activities	Eligibility interviews, Certificates of Eligibility, re-interviews, and records maintenance.	
	323 Parent, Family & Community Engagement	3230 Migrant Parent Advisory Council (PAC)	PAC meetings, planning, and required consultation.			
33 Neglected & Delinquent	330 Academic & Transition Services	3300 Title I-A Academic Support	Tutoring and instruction for students in correctional or neglected institutions.			
		3301 Transition/Re-entry Supports	Services to help youth transition back to local schools or employment.			
34 Professional Development	340 Professional Development	3400 Teacher & Leader PD	Evidence-based PD activities improving instruction.			
	341 Recruitment & Retention	3410 Recruitment & Retention	Hiring incentives, mentoring, and retention strategies.			
35 English Learners	350 English Language Development	3500 Title III – ELD Instruction	Direct ELD instructional services for EL students.			
	351 Immigrant Student Support	3510 Immigrant Student Programs	Orientation, transition, and academic supports for immigrant youth.			
36 Student Support & Academic Enrichment	360 Well-Rounded Education	3600 Well-Rounded Ed Supports	Music, arts, STEM, AP/IB, and enrichment courses funded by Title IV.			
	361 Safe & Healthy Schools	3610 Safe & Healthy Supports	Mental health, drug prevention, and violence prevention.			
	362 Effective Use of Technology	3612 Educational Technology Supports	Devices, software, PD for tech integration.			
37 Rural School Programs	370 Rural Education Supports	3700 Title V Rural Supports	Flexible funding for academic supports in rural schools.			
38 Native Education Supports	380 Native Education Supports	3800 Title VI Native Ed Supports	Academic and cultural enrichment for Native students.			
39 Homeless Education	390 Homeless Student Supports	3900 McKinney-Vento Supports	Transportation, liaison services, and academic support for homeless youth.			
4 Alternative & Enrichment Programs	41 Career & Technical Education (CTE)	410 Occupational Education	4101 Pre-Apprenticeship Training	Structured preparation for entry to apprenticeship programs.		
		411 Technical Education	4110 Technical Certification Programs	Coursework leading to recognized technical/industry certifications.		
			4111 Career & Tech Foundations	Foundational technical coursework and lab experiences.		
			4120 Internships	Supervised student internships with documented learning plans.		
			4121 Apprenticeships	Work-based learning with progressive skill development.		
		42 Advanced Learning	420 Gifted and Talented Education	4200 Gifted Identification	Processes and tools to identify gifted/advanced learners.	
				4201 Talent Development Seminars	Enrichment seminars/projects for identified gifted students.	
			421 Advanced Placement & IB	4210 Advanced Placement (AP) Courses	AP courses preparing students for AP examinations.	
				4211 International Baccalaureate (IB) Courses	IB courses within the IB programme.	
			422 Honors Programs	4220 Honors Classes	Enriched/accelerated coursework through honors sections.	
		43 Student Support & Engagement	430 Student Support Services	4300 Counseling / Mentoring	Student counseling, mentoring, and case coordination.	
				4301 Wraparound Student Services	Connections to school-based supports that promote well-being.	
	431 Attendance & Engagement	4310 Attendance Improvement Programs	Initiatives focused on reducing absenteeism and increasing ADA.			
		4311 Engagement Initiatives	Programs designed to improve connection and participation.			
	432 Behavioral Supports	4320 PBIS Supports	Positive Behavioral Interventions and Supports implementation.			
		4321 Restorative Practices	Mediation, circles, and restorative approaches to resolve conflict.			
5 Adult & Continuing Education	50 Adult Basic Education	500 Adult Basic Education	5000 Adult Literacy	Reading/writing literacy for adults.		
			5001 Adult Numeracy & Digital Basics	Math and essential digital skills for adults.		
		501 English as a Second Language (Adult)	5010 Adult ESL	English language instruction for adult learners.		
			5011 ESL Civics / Community English	ESL with a focus on civic participation and community navigation.		
		502 High School Equivalency	5020 GED Preparation	Preparation for GED/HSE assessments.		
			5021 HSE Readiness Workshops	Test-readiness seminars and study supports.		
		51 Continuing & Postsecondary Transition	510 Postsecondary Transition	5100 Postsecondary Transition Planning	Planning and navigation for college, training, or workforce entry.	
				5101 College & Career Readiness Workshops	Application, financial-aid, and readiness seminars.	
			511 Continuing Education	5110 Community Education Courses	Community-based continuing education offerings.	
				5111 Lifelong Skills Workshops	Noncredit personal/professional skill development.	
			512 Workforce Training	5120 Workforce Certification	Training aligned to industry credentials.	
				5121 Employment Readiness Bootcamps	Job-search, interviewing, and workplace skills.	
6 Child Nutrition	60 Child Nutrition – School Year	600 School Breakfast Program (SBP)	6000 SBP – Meal Service	Breakfast meal production/service under SBP.		
			6001 SBP – Compliance & Outreach	Program compliance, claims, and participation outreach.		
		601 National School Lunch Program (NSLP)	6010 NSLP – Meal Service	Lunch meal production/service under NSLP.		
			6011 NSLP – Compliance & Food Safety	HACCP/food-safety practices and claims/compliance.		

		602 After School Snack Program	6020 Afterschool Snack – Operations	Procurement, production, and service of snacks.
			6021 Afterschool Snack – Site Monitoring	Sponsor oversight and site reviews.
	61 Child Nutrition – Summer	610 Summer Food Service Program (SFSP)	6100 SFSP – Meal Service	Summer Food Service Program meal operations.
			6101 SFSP – Admin & Outreach	Sponsor administration, claims, monitoring, and promotion.
		611 Seamless Summer Option (SSO)	6110 SSO – Seamless Meal Service	Summer/break meal service using NSLP/SBP rules.
			6111 SSO – Oversight & Reporting	Recordkeeping, compliance, and reporting.
	62 Child Nutrition – Nutrition Ed & Compliance	620 Fresh Fruit and Vegetable Program (FFVP)	6200 FFVP – Produce Distribution	Purchase and distribution of fresh fruits/vegetables to schools.
			6201 FFVP – Nutrition Promotion	Student education and promotion of healthy choices.
		621 Nutrition Education & Compliance	6210 Nutrition Education	Nutrition education activities supporting program goals.
			6211 Menu/Regulatory Compliance	Menu planning and documentation to meet federal rules.
7 Community & Enterprise Programs	70 Community & Enterprise Programs	700 Community Education	7000 Community Learning Programs	Educational programs open to the broader community.
			7001 Family Workshops & Events	Family-focused workshops and informational events.
		701 Enterprise Operations	7010 School-Run Enterprises	Fee-based operations (e.g., bookstore, concessions, rentals).
			7011 Enterprise Admin & Billing	Budgeting, billing, and compliance for enterprise operations.
		702 Cultural & Recreational Programs	7020 Community Recreation	Recreation programs (sports, fitness, games) for community use.
			7021 Community Arts & Music	Arts and music programs/events for community participants.
8 Extended Learning	80 After School	800 After School Programs	8000 After-School Tutoring	Standards-aligned tutoring beyond the school day.
			8001 After-School Enrichment	Clubs, arts, STEM, and other enrichment after school.
	81 Summer Learning	810 Summer School – Regular	(blank)	(blank)
		811 Summer School – Special Education	(blank)	(blank)
9 Debt Service	90 Debt Service	900 Debt Service – Principal	9000 Debt Service – Principal Payment	Scheduled principal payments on outstanding debt.
		901 Debt Service – Interest	9010 Debt Service – Interest Payment	Scheduled interest payments on outstanding debt.
		902 Debt Service – Fees & Issuance	9020 Debt Service – Fees & Issuance	Costs associated with issuance and servicing of debt.

Curriculum Type No and Name	Curriculum Category No and Name	Curriculum Class No and Name	Definition
1 Core Academic	10 English Language Arts	100 English	Instruction in reading, writing, literature, and language studies.
	11 Social Studies	110 Social Studies	Instruction in history, geography, civics, and other social sciences.
	12 Science	120 Science	Instruction in biology, chemistry, physics, and scientific disciplines.
	13 Mathematics	130 Mathematics	Instruction in arithmetic, algebra, geometry, calculus, and advanced math.
	14 Languages	140 Languages	World languages and immersion programs.
2 Enrichment & Applied	20 The Arts	200 The Arts	Visual arts, music, theater, dance instruction.
	21 Physical Education	210 Physical Education	Fitness, sports, physical activity instruction.
	22 Health Education	220 Health Education	Instruction on physical health, mental health, nutrition, and wellness.
	23 Drivers' Education	230 Drivers' Education	Training programs preparing students for a driver's license.
	24 Extracurriculars	240 Athletics	School-sponsored competitive sports and athletic programs.
		241 Clubs & Activities	Student clubs, interest groups, and co-curricular activities.
		242 Performing Arts	Band, choir, theater productions outside required coursework.
		243 Student Leadership	Student council, peer leadership, and civic engagement activities.
	25 Career and Technical Education	250 Business & Management	CTE program strand focusing on business operations, entrepreneurship, and management practices.
		251 Health Services	CTE strand in health-related professions (nursing, medical assisting, health science).
		252 Human Resources	CTE strand for HR management, employment law, and workplace relations.
253 Industrial & Engineering Systems		CTE strand covering design, manufacturing, and production systems.	
254 Natural Resource Systems		CTE strand addressing agriculture, forestry, fisheries, and environmental management.	
255 Other Professional/Technical Strands		CTE strand placeholder for emerging or unclassified technical programs.	
256 21st Century Learning		260 21st Century Learning	Learning that focuses on developing the knowledge, skills, and habits needed for success in the modern world, emphasizing critical thinking, communication, collaboration, and creativity (the 4 Cs), along with digital literacy and a broader understanding of diverse cultures.
3 Specialized/Other	30 Home Instruction	300 Home Instruction	Instruction provided at home for students unable to attend school.
	31 No Area Assigned	(blank)	(blank)
Grand Total			

Grade Type No and Name	Grade Category No and Name	Grade Class No and Name	Grade Class Description	
1 PreK-5	10 Pre-Kindergarten	100 PK3	Programs and costs for 3-year-old preschool, including instruction, meals, and classroom supports.	
		101 PK4	Programs and costs for 4-year-old preschool, including instruction, meals, and classroom supports.	
	11 Primary (K-2)	110 Kindergarten Readiness / Transition	Early childhood programs designed to prepare students for kindergarten entry, including screenings and parent engagement.	
	12 Intermediate (3-5)	120 Kindergarten	Instruction and supports for kindergarten students, plus meals, transportation, and facilities.	
		121 Grade 1	Instruction and supports for first grade students, plus meals, transportation, and facilities.	
		122 Grade 2	Instruction and supports for second grade students, plus meals, transportation, and facilities.	
		123 Grade 3	Instruction and supports for third grade students, including testing readiness, meals, and facilities.	
		124 Grade 4	Instruction and supports for fourth grade students, plus meals, activities, and facilities.	
		125 Grade 5	Instruction and supports for fifth grade students, plus meals, activities, and facilities.	
		2 Middle (6-8)	20 Middle (6-8)	200 Grade 6
201 Grade 7				Instruction and supports for seventh grade students, including meals, transportation, and facilities.
202 Grade 8	Instruction and supports for eighth grade students, including meals, transportation, and facilities.			
3 High (9-12)	30 High (9-12)	300 Grade 9	Instruction and supports for ninth grade students (freshman), including meals, athletics, and facilities.	
		301 Grade 10	Instruction and supports for tenth grade students (sophomore), including meals, athletics, and facilities.	
		302 Grade 11	Instruction and supports for eleventh grade students (junior), including meals, athletics, testing, and facilities.	
		303 Grade 12	Instruction and supports for twelfth grade students (senior), including meals, athletics, graduation, and facilities.	
4 Ungraded/Adult	40 Ungraded/Adult	400 Ungraded Students	Programs for students not assigned to a traditional grade (e.g., special education, alternative programs).	
		401 Adult/Continuing Education	Programs serving adult learners, GED, continuing education, and workforce transition supports.	

Accountability Measure Type No and Name	Accountability Measure Category No and Name	AccMeasure Cat Definition
1 High-Quality Learning Experiences	10 Grade-Level Learning	Instruction and assessment designed to ensure all students achieve proficiency in the knowledge and skills outlined in Oregon's grade-level academic content standards. Districts are required to report student progress toward these standards annually.
	11 Skillful Instructional Practices	Teaching methods that are evidence-based, differentiated, and aligned with state standards to maximize student engagement and achievement. Oregon emphasizes the use of effective, research-backed instructional strategies.
	12 Coordinated Learning Experiences	Intentional planning and integration of curriculum, instruction, and assessment across subjects and grade levels to provide a seamless and coherent educational experience for students.
	13 Responsive Systems of Support	Structures and interventions that identify and address individual student needs, including academic, behavioral, and social-emotional supports, to ensure equitable access to learning opportunities.
2 Aligned and Focused Educational Systems	14 Relevance and Empowerment	Curriculum and instruction that connect learning to students' lives, interests, and future goals, fostering student agency, motivation, and empowerment in their education.
	20 Curriculum Coherence	Alignment and consistency of curriculum, instruction, and assessment within and across grade levels, ensuring all students have access to a rigorous and standards-based education.
	21 Data-Informed Systems	Use of timely and accurate data to guide instructional decisions, monitor student progress, and improve educational outcomes. Oregon requires districts to use data for continuous improvement and accountability.
	22 Transparent Leadership and Collective Accountability	Leadership practices that promote open communication, shared responsibility, and clear expectations for student success among staff, families, and the community.
3 Engaged Partners & Community	23 Comprehensive, Student-centered Support Systems	Integrated services and resources that address the academic, social, emotional, and physical needs of all students, with a focus on equity and individualized support.
	24 Equitable Allocation of Resources for Impact	Distribution of funding, staff, and materials based on student needs and priorities to ensure all students have the resources necessary for success.
	30 Intentional and Inclusive Family Engagement	Active partnerships with families that recognize and value their diverse backgrounds and contributions, ensuring families are informed, involved, and supported in their children's education.
	31 Shared Decision-making and Collaborative School Culture	Processes that involve staff, students, families, and community members in meaningful decision-making to foster a positive, inclusive, and collaborative school environment.
	32 Transparent Reporting and Communication	Clear, timely, and accessible sharing of information about student progress, school performance, and district initiatives with families and the community, as required by state reporting laws.
	33 Community Partnerships for Opportunity	Collaboration with local organizations, businesses, and agencies to expand learning opportunities, provide additional supports, and connect students to real-world experiences.
4 Safe and Inclusive Schools	34 Coordinated Access to Services	Systems that ensure students and families can easily connect with academic, health, mental health, and social services, often through school-based or community partnerships.
	40 Comprehensive Mental Health and Well-being Supports	Programs and services that promote student mental health, provide prevention and intervention, and create supportive school environments, as required by Oregon's standards for safe and healthy schools.
	41 Safe and Inclusive School Environments	Policies, practices, and supports that ensure all students feel physically and emotionally safe, respected, and included, regardless of background or identity.
	42 Positive School Climate and Engagement	Efforts to foster a welcoming, respectful, and engaging school atmosphere that supports positive relationships and student engagement in learning.
	43 Restorative, Identity-Affirming Practices	Approaches that repair harm, build community, and affirm students' identities, often as alternatives to exclusionary discipline practices, in alignment with Oregon's equity and discipline requirements.
5 Committed and Supported Staff	44 Integrated Staff Well-being and Support Systems	Comprehensive supports for staff, including professional development, mental health resources, and wellness initiatives, to promote retention and effectiveness.
	50 Educator Collaboration	Structures and time for teachers and staff to work together on curriculum, instruction, student support, and professional growth, as encouraged by Oregon's standards for effective instruction.
	51 Educator Leadership and Support	Opportunities and supports for educators to take on leadership roles, receive mentoring, and participate in decision-making, contributing to school improvement and staff retention.
	52 Comprehensive Educator Evaluation Systems	Systems for evaluating educator performance using multiple measures, including student learning, professional practice, and contributions to school culture, as required by Oregon law.
	53 Workforce Well-being, Retention, and Career Development	Initiatives to recruit, support, and retain a diverse and effective workforce, including pathways for career advancement and ongoing professional development.
	54 Conditions for Learning and Thriving	Ensuring that all aspects of the school environment—physical, social, and emotional—support student learning, engagement, and well-being, in alignment with Oregon's vision for equitable and effective schools.



OAR 581-021-3007 (Accommodations for Students with Concussions or Other Brain Injuries) 390

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Recommendation of Permanent Rule Making

- The State Board of Education Adopted [Temporary OAR 581-021-3007](#) (OAR 581-021-3007) on 6/12/2025
- ODE is recommending the adoption of Temporary OAR 581-021-3007 with no changes as the permanent OAR.

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OAR 581-021-3007: Overview

Summary of what's new:

[HB 3007 \(2025\)](#) requires ODE to:

- Establish a procedure for public education providers to use to develop and implement an immediate and temporary accommodation plan for a student who has been diagnosed with a concussion or other brain injury.
- Prepare a sample form, and include written instructions for the sample form, to assist public education providers in following the procedure to develop and implement an immediate and temporary accommodation plan (ITAP).

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HB 3007 (2025) Requires Public Education Providers to:

- Upon receiving written notification from a parent or guardian that a student has been diagnosed with a concussion or other brain injury by a health care professional and that accommodations are being requested, a public education provider shall initiate procedures developed by ODE to develop and implement an ITAP.

OAR 581-021-3007: Justification

HB 3007 established new requirements for ODE and public education providers and required a temporary OAR:

- OAR was necessary to clarify that procedures developed by the Department must be used by public education providers to develop and implement an ITAP for a student who has been diagnosed with a concussion or other brain injury.
- OAR was required to clarify use of “Sample form.”
- OAR was necessary to clarify terms and mandates in HB 3007.
- HB 3007 applies to the 2025-2026 school year.

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OAR 581-021-3007: Summary

*(1)(c) “Written notification” means a written notice from a parent or guardian, **supported by medical documentation from a health care professional**, informing the public education provider that they are requesting an accommodation for a student who has been diagnosed with a concussion or other brain injury by a health care professional.*

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Justification: Language is aligned with the intent of HB 3007 that a diagnosis of a concussion or other brain injury has occurred and will ensure medical documentation is available to verify diagnosis, inform determination of accommodations, and ensure safety of student.

OAR 581-021-3007: Summary

(2) When a public education provider receives written notification from a parent or guardian that a student has been diagnosed with a concussion or other brain injury, the public education provider shall follow all procedures developed by the Oregon Department of Education to develop and implement an immediate and temporary accommodation plan.

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Justification: Language is aligned with the intent and language of HB 3007 and clarifies that public education providers are required to follow all procedures developed by ODE.

OAR 581-021-3007: Summary

(3) A public education provider shall use a sample form developed by the department or a district form that includes all content from the department's sample form when developing the accommodation plan described in section (2) of this rule.

Justification: Language is aligned with the intent of HB 3007 and clarifies that public education providers shall use a sample form developed by ODE. New language clarifies that districts may use a district form if it includes all content from ODE's sample form.

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OAR 581-021-3007: Summary

*(4)(b) In considering the requirements of section (3)(a) of this rule, the public education provider shall consider all physical activities **occurring while the student is in school, at a school-sponsored activity, under the supervision of school personnel, in before-school or after-school care programs on school-owned property, and in transit to or from school or school-sponsored activities**, including but not limited to physical education, recess, unstructured play and similar activities provided by or sponsored through the public education provider that involve running, jumping, climbing, throwing, catching or other movements that pose a risk of falls, collisions or physical injury.*

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Justification: Language clarifies that public education providers must consider physical activities outside of class time. This is aligned with OAR 581-021-0037 (Medication Administration) and OAR 581-022-2220 (Health Services).

OAR 581-021-3007: Summary

(5) Nothing in this rule prohibits a public education provider from determining that a student needs an immediate and temporary accommodation plan without receiving written notice from the parent or guardian that the student has been diagnosed with a concussion or other brain injury.

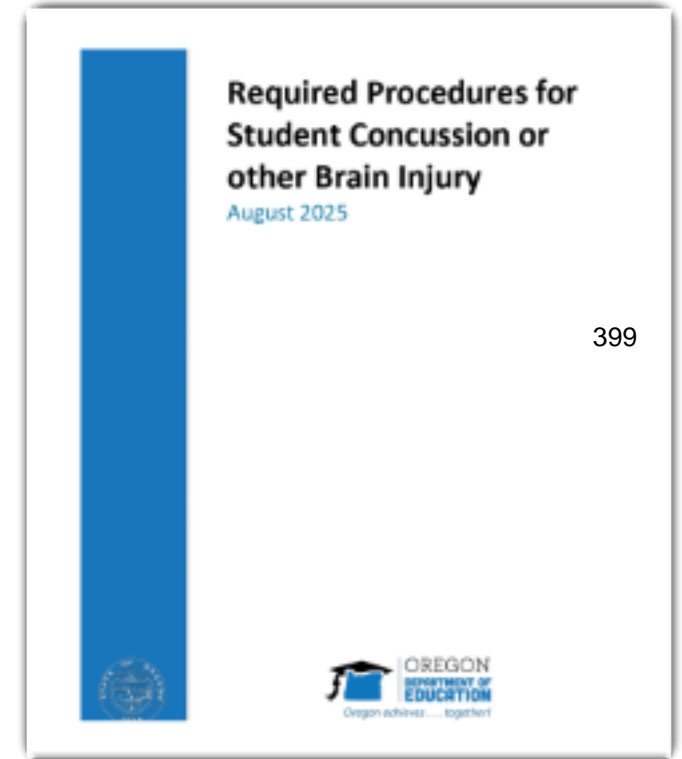
398

Justification: Language clarifies that nothing in this OAR prevents a public education provider from determining and implementing immediate and temporary accommodations for a student for whom they have not received written notification of a concussion or brain injury. Public education providers continue to have the discretion to limit a student's physical activity if they suspect a student has a concussion or other brain injury.

ODE Concussion and Brain Injury Procedures

Procedures ensure:

- **Students receive a timely and coordinated response** following a concussion or other brain injury, promoting safety and supporting recovery.
- **Early identification and implementation of temporary accommodations** help reduce symptom severity, prevent further injury, and promote a smoother recovery.
- **Students return to school as soon as medically appropriate**, often with accommodations, allowing them to remain connected, emotionally supported, and academically engaged.
- **Schools provide consistent and equitable practices** that promote educational continuity during the recovery process.



ODE Concussion and Brain Injury Procedures

ODE Concussion and Brain Injury Procedures outline:

- Requirement that all students have access to a School Building Brain Injury Management (SBBIM) Team
- SBBIM team responsibilities and composition
- Key timelines for physical activity restrictions and implementation of an ITAP.
- Use of an ITAP to identify symptoms and impacts on learning, determine appropriate accommodations, and monitor student progress and adjust supports.
- Parent or guardian participation on the Brain Injury Management Team is strongly encouraged to ensure a comprehensive, student-centered approach to recovery.

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Immediate and Temporary Accommodations Plan (ITAP)

The SBBIM Team must follow ODE procedures and use the ITAP form to:

- Determine whether immediate physical activity limitations are necessary to protect the student's safety, support recovery, and reduce the risk of reinjury.
- Review the student's current symptoms and their academic and functional impacts.
- Identify appropriate temporary physical, cognitive, social emotional and other necessary accommodations that support the student's meaningful participation in educational activities.

The image shows a form titled "IMMEDIATE AND TEMPORARY ACCOMMODATIONS PLAN (ITAP) FOR TRAUMATIC BRAIN INJURY". The form includes fields for Student, DOB, IDE, School, and Grade. It also has sections for TBI sustained on, Date Written Notification Received, Return to School Anticipated, Date ITAP completed, and a list of other team members consulted. There are fields for Parent/Guardian Name and Contact, and Medical Provider Name and Contact. A paragraph explains that a concussion or other brain injury can significantly affect a student's ability to participate in learning by impacting physical, cognitive, emotional, and behavioral functioning. It states that each student's recovery is unique and may include periods of progress and setbacks. A timely, symptom-based response, including temporary physical, cognitive, and social-emotional accommodations is critical to ensuring safety, supporting recovery, and promoting continued access to education. In accordance with House Bill 3007 (2025) and OAR 581-021-3007 public education providers are required to follow ODE's brain injury procedure and use this Immediate and Temporary Accommodations Plan (ITAP) upon receiving written notification that a student has been diagnosed with a concussion or other brain injury. Plan components may be adjusted or discontinued by the Brain Injury Management Team as needed and must remain in effect until formally revised/discontinued.

Medical Documentation Date: _____ Notes: _____
Abbreviated Day Recommended? Y N Notes: _____
Related Medication in the Health Room Y N Notes: _____

The student reports the following signs and symptoms:
(See [ODE's Symptom-Based Accommodation Guide](#))

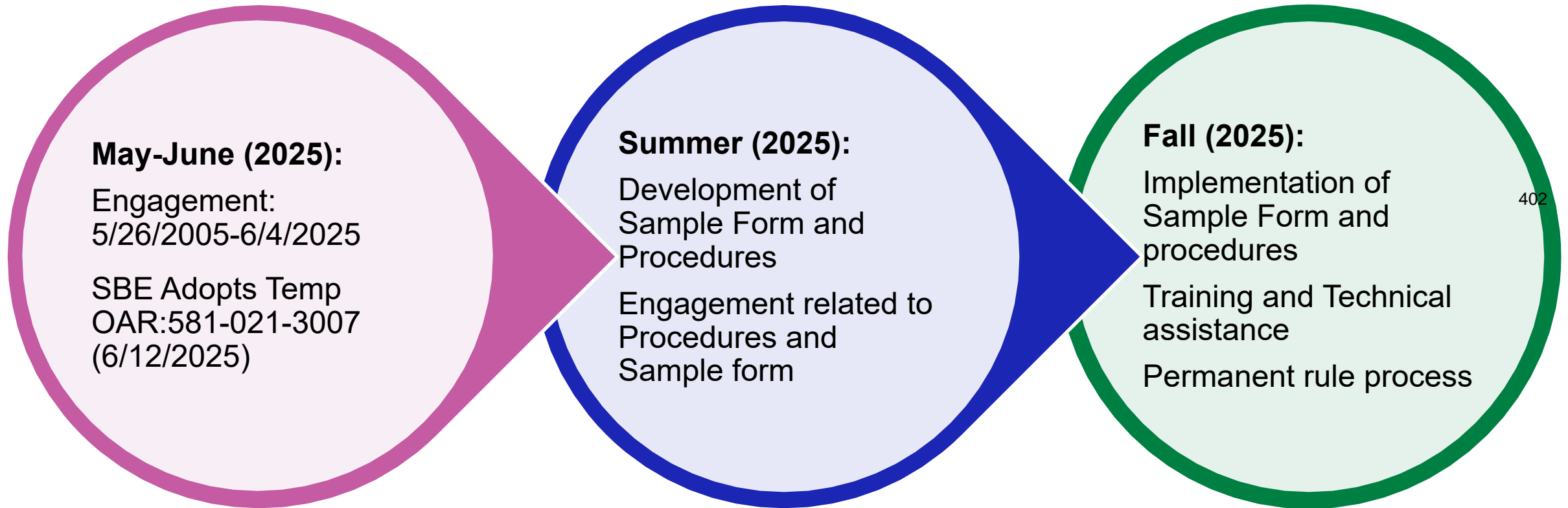
PHYSICAL:
 Headache or head pressure Light sensitivity Sound sensitivity Smell sensitivity Fatigue
 Dizziness, Balance problems Nausea and vomiting Numbness or Tingling Ringing in ears
 Impaired sleep (more, less, or fragmented) Blurry or double vision Trauma associated seizures
 Other: _____ Other: _____

COGNITIVE:
 Slowed information processing Difficulty with Attention and concentration "Brain fog" Difficulty with memory Trouble learning new information or retaining it Unable to follow instruction Inability to multitask or organize Difficulty tracking conversations Feeling "slowed down"
 Other: _____ Other: _____

SOCIAL-EMOTIONAL:
 Poor emotional regulation Irritability or quick to anger Unusual sadness Decreased motivation,
 Anxiety or depression Post-traumatic stress disorder Grief Loss of social skills Withdrawal from friends and family Other: _____ Other: _____

Link: [Immediate and Temporary Accommodations Plan \(ITAP\)](#)

Implementation of HB 3007 Accommodations for Students with Concussions or Other Brain Injuries: Timeline & Engagement



Engagement and Feedback

Temp OAR Engagement

- ODE's Ongoing Rules Community Advisory (ORCA),
- Brain Injury Work Group, School Nurses,
- ESD administrators
- Coalition of School Administrators.

OAR, Procedures, Form Engagement

- OHA/ODE Brain Injury Workgroup,
- School Nurse Brain Injury Workgroup
- School Psychologist/School Counselor engagement
- Oregon School Athletic Association and Athletic Trainer engagement
- Center on Brain Injury Research and Training
- Coalition of School Administrators and Oregon School Board Association
- Consultation with ODE Small Schools Specialist
- Consultation with ODE IDEA and 504 teams

Response

- SBE adopted Temp OAR 581-021-3007 rules to ensure effective implementation of HB 3007. (6/25)
- ODE published Required Procedures and Sample Form. (8/25)
- Permanent OAR process

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OAR 581-021-3007: Equity Impact

Implementing consistent statewide procedures helps ensure all students with concussions or brain injuries receive fair and timely support.

- **Consistent Access.** Standardized procedures and ITAP forms ensure all students, regardless of district resources or geography, receive equitable support.
- **Reduced Disparities.** Clear, uniform practices minimize inequities in return-to-learn and return-to-play, especially for rural, low-income, and multilingual students.
- **Improved Communication.** Consistent documentation strengthens collaboration among schools, healthcare providers, and families, preventing vulnerable students from being overlooked.

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OAR 581-021-3007: Fiscal Impact

- **Minimal to no Cost to State Agencies.** Anticipated fiscal impact is limited, largely involving coordination, training resources, and maintaining standardized ITAP forms and procedures.
- **Manageable Public Education Provider Costs.** Public education providers may incur minor costs for staff training, communication materials, and recordkeeping, but no significant new staffing or infrastructure is required.
- **Leverage Existing Resources.** Implementation builds on current health, safety, and student support systems, reducing the need for new expenditures.
- **Shared Benefits.** Small upfront costs are offset by long-term efficiencies, clearer processes, and improved student outcomes across public education providers.

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Thank You

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Link: [Temporary OAR 581-021-3007 \(Accommodation for Students with Concussions or Other Brain Injuries\)](#)

Required Procedures for Student Concussion or other Brain Injury

August 2025



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Introduction

A timely and coordinated school response to a concussion or other brain injury is essential to ensuring student safety, supporting recovery, and maintaining academic progress. As school staff, you play a critical role in recognizing symptoms, initiating communication with families and healthcare providers, and implementing supports. Brain injuries can result in a wide range of physical, cognitive, and social-emotional symptoms that affect thinking, memory, attention, and behavior in the classroom. Early identification and the use of temporary accommodations can help reduce symptom severity, prevent further injury, and promote a smoother recovery. Returning to school as soon as medically appropriate, often with accommodations, helps students stay connected, emotionally supported, and cognitively engaged.

It is important to understand that behaviors observed after a brain injury may be a result of the injury, rather than defiance or misconduct. School staff should avoid exclusionary discipline in these cases and instead assess whether the behavior could be a manifestation of the injury. Focus should be placed on trauma-informed strategies, positive behavioral supports, and proactive interventions. This approach helps ensure that students are not penalized for symptoms beyond their control and reinforces a safe, inclusive, and supportive school environment for all learners.

Every brain injury is different, and students recover at different rates. Symptoms can vary throughout the day or change depending on the environment or the phase of recovery. A symptom-based return-to-school approach allows educators to adjust academic expectations and classroom activities based on the student's current tolerance and needs. Tasks such as screen use, reading, or problem-solving may need to be limited temporarily. Regular communication and collaboration between classroom teachers, specialists, school nurses, counselors, administrators, and families are key to supporting a successful and gradual reintegration into full school participation.

Legal Framework: Immediate Action for Student Brain Injuries

[House Bill 3007 \(2025\)](#) and [OAR 581-021-3007](#) established that the Oregon Department of Education (ODE) develop procedures and an [Immediate and Temporary Accommodation Plan \(ITAP\)](#) for public education providers to follow upon receiving written notification that a student has been diagnosed with a concussion or other brain injury.

Key Timelines Upon Receipt of Written Notification

- **Immediate:** Physical activity restrictions upon determination
- **Within 10 school days:** Full ITAP implementation
- **Within 5 school days of implementation of the ITAP:** First review
- **Every 2 months maximum:** Subsequent reviews after first review

Definitions

Health care professional: A person who is licensed or registered under Oregon laws as a physician, a chiropractic physician, a naturopathic physician, a psychologist, a physical therapist, an occupational therapist, a physician associate, or a nurse practitioner.

Public education provider: A school district, a public charter school, or an education service district.

Written notification: A written notice from a parent or guardian, supported by medical documentation from a health care professional, informing the public education provider that they are requesting accommodations for a student who has been diagnosed with a concussion or other brain injury by a health care professional.

Brain Injury Management Team: A multidisciplinary group responsible for coordinating academic and health-related supports for students recovering from a concussion or other brain injury. The team determines accommodations, monitors progress, adjusts accommodations as needed, and ensures consistent communication among school staff, the student and their family, and healthcare providers.

Medical documentation: Documentation from a healthcare professional that confirms a diagnosis of a concussion or other head injury. This may include:

- Health care professional letter/note
- Discharge summary from hospital or clinic
- Medical office visit summary

Step-by-Step Process

Per [OAR 581-021-3007](#), public education providers are required to implement the following procedures:

Step 1: Receive Written Notification

Upon receiving written notification from a parent or guardian with medical documentation, the school must:

- Document the date received.
- Notify the School Brain Injury Management Team within 24 hours.
- Begin the ITAP process immediately.

Step 2: Convene Brain Injury Management Team

Within 2 school days of notification:

- Schedule a team meeting.
- Invite student and parent/guardian to participate.
- Gather relevant information about the student.

Step 3: Develop Immediate and Temporary Accommodations Plan

The team must:

- Review medical documentation and recommendations.
- Assess current symptoms and their impact.
- Determine necessary physical activity restrictions (implement immediately).
- Identify physical, cognitive, and social-emotional accommodations.
- Complete the ITAP form.

Step 4: Implement and Communicate Plan

- Share the completed ITAP with the parent/guardian on the day it is developed.
- Notify all staff who have responsibilities under the ITAP of their responsibilities within 24 hours.
- Ensure accommodations are implemented as soon as possible and, in no case, more than 10 school days from receiving written notification.

Step 5: Monitor and Review

- Conduct first review within 5 school days of implementation.
- Schedule subsequent reviews at least every 2 months.
- Adjust accommodations based on student symptom progression.
- Document service provision (if applicable), and all reviews and changes.

These procedures do not limit public education providers from supporting students who lack a formal diagnosis. Schools have a legal and ethical obligation to take immediate and appropriate action to protect the health and safety of any student suspected of sustaining a concussion or other brain injury. This includes implementing appropriate accommodations, regardless of whether a formal medical diagnosis has been provided. Public education providers must ensure that their policies and practices are aligned with all applicable state and federal laws.

School Building Brain Injury Management Team

Every public education provider must have policies and practices in place to ensure all students have access to a Brain Injury Management Team and receive appropriate accommodations following a brain injury. Concussion and brain injury policies help ensure a coordinated and consistent response across all schools to support student safety and recovery. These policies and practices must include provisions for staff training, team coordination, and oversight to ensure proper response when a student sustains a concussion or other brain injury. Policies and practices must ensure:

- A symptom-based return-to-school approach that adjusts academic expectations and supports in response to the student's current symptoms and stage of recovery.
- Implementation and training of concussion protocols across all school buildings.
- Oversight and consultation are provided for Brain Injury Management Teams.

Required Procedures for Student Concussion or other Brain Injury - 2025

- Public education provider-wide documentation is maintained, and use of ODE's Immediate Temporary Accommodations Plan (ITAP) form and procedures are regularly reviewed.
- Public education provider policies are updated and aligned with current state and medical guidelines.

Team Composition

Team membership may vary depending on the student's needs but should always include individuals who can support the student's medical, academic, and social-emotional recovery. At a minimum, a School Brain Injury Management Team must include individuals who collectively meet the following qualifications and areas of expertise. In some cases, a single individual may meet multiple qualifications and fulfill more than one role on the team, provided that the team maintains a collaborative, student-centered approach.

Required Expertise:

1. At least one person who is qualified to interpret medical information and determine necessary health related services and accommodations.
2. At least one person who is knowledgeable about brain injuries and concussions including the physical, cognitive, and social-emotional symptoms a student may experience.
3. At least one person who is qualified to determine physical, cognitive, and social-emotional accommodations based on the student's circumstances.
4. At least one person who is knowledgeable of the student's baseline functioning.
5. Other school personnel, if not already included, as appropriate (i.e. counselors, behavioral support staff, athletic trainers, school psychologists, or administrators.)

Team Responsibilities

- Initiate ITAP process upon notification of a concussion or other brain injury.
- Using the ITAP, Identify symptoms and impacts on learning, and determine appropriate accommodations
- Monitor student progress and adjust supports.
- Ensure compliance with all timelines.
- Coordinate with public education provider-level support.
- Include the student in planning when developmentally appropriate.

Parent/Guardian Participation

The participation of a parent or guardian on the Brain Injury Management Team is strongly encouraged to ensure a comprehensive, student-centered approach to recovery. Parents and guardians offer valuable insight into the student's medical history, symptoms, and behavior outside of school, which helps the team develop more accurate and effective supports. Their

involvement also promotes consistent communication between home, school, and healthcare providers, ensuring that accommodations are well-coordinated and aligned across settings.

The team must:

- Provide timely notification and invitation to participate.
- Offer multiple ways to participate (in-person, phone, video).
- Document efforts to include parents/guardians.
- Share completed ITAP and provide clear instructions for input.
- Meaningfully consider parent/guardian input regarding accommodations.

As applicable, public education providers must ensure alignment with parent involvement requirements of other Federal and state regulations including but not limited to the Individuals with Disabilities Act (IDEA), Section 504 of the Rehabilitation Act of 1973, and Abbreviated School Day Program (ASDP) requirements.

Immediate and Temporary Accommodations Plan (ITAP)

The Brain Injury Management Team must use a collaborative, data-informed, student-centered approach to determine appropriate supports following a concussion or other brain injury. The team shall work toward consensus decisions firmly grounded in available assessment data, medical information, educational records, and observed student needs. Guided by ODE procedures and the Immediate Temporary Accommodations Plan (ITAP) form, the team gathers and analyzes input from key members including educators, healthcare providers, the school nurse, the student (when appropriate), and the family to identify and implement immediate and temporary accommodations.

The Brain Injury Management Team is responsible for determining immediate physical activity restrictions and establishing immediate and temporary accommodations for a student who has sustained a concussion or other brain injury. This process must follow ODE procedures and utilize the ODE ITAP form. Key team responsibilities include:

- Discuss medical recommendations, school observations, parent/guardian insights, and student input (when appropriate).
- Determine whether immediate physical activity limitations are necessary to protect the student's safety, support recovery, and reduce the risk of reinjury.
- Use the ITAP form to review the student's current symptoms and their academic and functional impacts.
- Use the ITAP form to identify appropriate temporary physical, cognitive, social-emotional and other necessary accommodations that support the student's meaningful participation in educational activities, based on their stage of recovery.
- Share the completed ITAP form with the parent or guardian, all instructional staff, and any school personnel responsible for the student's supervision or health, including school administrators, school nurses, counselors, teachers, bus drivers, coaches, athletic trainers, and recess or physical activity supervisors.

Required Procedures for Student Concussion or other Brain Injury - 2025

- Conduct a follow-up review of the student and revise the ITAP within 5 school days of implementation, and subsequently at intervals not to exceed every two months.
- Implement any necessary physical activity limitations (including but limited to recess, physical education, school sponsored after and before school activities) immediately upon determination or as soon as practicable—no later than the next scheduled course or activity requiring such restrictions.
- Ensure that the accommodations outlined in the student’s ITAP are implemented as soon as possible and no later than 10 school days after written notification of the concussion or brain injury is received by the public education provider.

In the absence of complete information or documentation, the team shall continue to determine accommodations using this collaborative, student-centered process, documenting the basis for decisions with available evidence. This responsibility includes implementing necessary accommodations promptly, monitoring their effectiveness through data collection, and making timely adjustments as the student’s recovery progresses. This same evidence-based, collaborative approach must also guide decisions to adjust or discontinue accommodations as the student’s needs evolve, with consistent documentation of the rationale for changes.

Documentation and Records

Public education providers are responsible for maintaining clear and consistent documentation throughout the brain injury management process to ensure compliance with ODE procedures and to support student recovery. All documentation related to the Immediate Temporary Accommodations Plan (ITAP) and associated actions must be treated as part of the student’s education record and maintained in accordance with state and federal student record requirements. Key documentation and recordkeeping requirements include:

- **Written Notification:** Record the date written notification of a suspected or diagnosed concussion or brain injury is received from a parent or healthcare provider.
- **ITAP Form Completion:** Complete and retain the ODE Immediate Temporary Accommodations Plan (ITAP), including symptoms, accommodations, physical activity restrictions, and team input.
- **Medical and Supporting Documentation:** Maintain copies of relevant medical documentation, provider recommendations, and any additional supporting information used to guide team decisions.
- **Communication Log:** Document when and with whom the ITAP was shared (e.g., parent/guardian, instructional staff, health and supervision personnel).
- **Follow-Up and Implementation Records:** Record follow-up reviews, ITAP revisions, and verification that accommodations and restrictions were implemented in a timely manner.

Intersection with Other Laws and Regulations

Individuals with Disabilities Education Act (IDEA) and Section 504 of the Rehabilitation Act of 1973

The brain injury management process may intersect with federal obligations under the IDEA and Section 504 of the Rehabilitation Act of 1973, particularly in relation to Child Find responsibilities. School districts must actively identify, locate, and evaluate students who may require special education or related services due to a disability, including those who have sustained a concussion or other brain injury. While the ITAP provides immediate and short-term support, ongoing symptoms or functional impairments may indicate the need for further evaluation under IDEA or Section 504. The Brain Injury Management Team must monitor the student's progress and, when appropriate, refer the student for evaluation to determine eligibility for an Individualized Education Program (IEP) or a Section 504 Plan. Coordination between ITAP implementation and existing evaluation and eligibility procedures ensures that students with longer-term needs are identified in a timely manner and receive appropriate, legally required supports.

For students already eligible under the Individuals with Disabilities Education Act (IDEA) or Section 504 of the Rehabilitation Act of 1973, the ITAP form must be completed by the student's existing IEP team or 504 team. These teams possess comprehensive knowledge of the student's educational history, baseline functioning, strengths, and needs, positioning them to develop the most appropriate and effective accommodations. When developing the ITAP, teams must consider both the acute effects of the concussion or other brain injury and the student's existing disabilities, for which they were already eligible under IDEA or Section 504, to ensure accommodations adequately address all areas of need. The IEP or 504 team must include individuals who meet the brain injury expertise requirements outlined in these procedures and must adhere to all ITAP timelines, including implementation within 10 school days and reviews within 5 school days and every 2 months thereafter. The ITAP serves as a temporary support layer that complements, rather than replaces, the services and accommodations in the student's IEP or 504 plan.

State Laws and Regulations

The development and implementation of an ITAP must align with applicable state laws and regulations to ensure students receive appropriate support following a concussion or other brain injury. The following policies provide important guidance related to school day modifications and health service requirements that public education providers must follow when supporting student recovery.

- **Abbreviated School Day Program (ASDP).** The use of an ITAP for students recovering from a concussion or other brain injury must be clearly distinguished from Oregon's ASDP requirements, as defined in ORS 343.321 to ORS 343.333 and related ODE guidance. While temporary adjustments to a student's school day or schedule (i.e. less

than 10 school days) may be appropriate as part of symptom-based recovery planning under an ITAP, these short-term accommodations are not considered an ASDP. However, if a student's school attendance or instructional time is reduced on a long-term basis (i.e., more than 10 days), a public education provider must follow the formal abbreviated school day process, including proper notification, documentation, and parent consent. The Brain Injury Management Team must ensure that any temporary schedule modifications remain aligned with the student's medical needs and recovery stage, are reviewed regularly, and do not result in unlawful or prolonged exclusion from a full educational program. See ODE's [Abbreviated School Day website](#) for additional information.

- **OAR 581-021-0222 (Health Services).** The implementation of an ITAP must align with [OAR 581-022-2220](#), which requires public education providers to have a process for assessing and determining a student's health service needs when a new medical diagnosis impacts access to education. This includes ensuring the availability of a licensed nurse to assess nursing needs upon, during, and following enrollment, and to implement an Individual Health Plan (IHP) prior to the student attending school. When a student sustains a concussion or other brain injury, the school nurse plays a key role in evaluating the student's health-related needs and coordinating care. The IHP, developed in response to the student's diagnosis, should be implemented in tandem with the ITAP to ensure that both medical and academic supports are aligned, timely, and responsive to the student's stage of recovery. See [ODE's OAR 581-022-2220 \(Health Services\) Resources website](#) for additional information.

Procedural Safeguards

If parents/guardians disagree with proposed accommodations:

1. Meaningfully consider parent/guardian input regarding accommodations.
2. Document concerns and attempt resolution at school level.
3. Involve school district-level administrator.
4. Provide information about formal school district complaint processes.

Resources and Contact Information

Additional information is available on the [ODE Concussions and Other Brain Injuries website](#), including:

- The ODE Immediate and Temporary Accommodations Plan (ITAP) form
- ODE's *Accommodations Guide for Symptom-Based Return to School*

For questions, contact:

Ely Sanders

Required Procedures for Student Concussion or other Brain Injury - 2025

School Health Services Specialist

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ely.sanders@ode.oregon.gov

IMMEDIATE AND TEMPORARY ACCOMMODATIONS PLAN (ITAP) FOR TRAUMATIC BRAIN INJURY

Student: _____ DOB _____ ID# _____ School _____ Gr. _____

TBI sustained on: _____ Date Written Notification Received: _____

Return to School Anticipated: _____ Date ITAP completed on: _____ By: _____

List other team members consulted _____

Parent/Guardian Name: _____ Contact _____

Medical Provider Name: _____ Contact _____

A concussion or other brain injury can significantly affect a student's ability to participate in learning by impacting physical, cognitive, emotional, and behavioral functioning. Each student's recovery is unique and may include periods of progress and setbacks. A timely, symptom-based response, including temporary physical, cognitive, and social-emotional accommodations is critical to ensuring safety, supporting recovery, and promoting continued access to education. In accordance with House Bill 3007 (2025) and OAR 581-021-3007 public education providers are required to follow [ODE's brain injury procedure](#) and use this Immediate and Temporary Accommodations Plan (ITAP) upon receiving written notification that a student has been diagnosed with a concussion or other brain injury. Plan components may be adjusted or discontinued by the Brain Injury Management Team as needed and must remain in effect until formally revised/discontinued.

Medical Documentation Date: _____ Notes: _____

Abbreviated Day Recommended? Y/N Notes: _____

Related Medication in the Health Room Y / N Notes: _____

The student reports the following signs and symptoms:

(See: [ODE's Symptom-Based Accommodation Guide](#))

PHYSICAL:

- Headache or head pressure Light sensitivity Sound sensitivity Smell sensitivity Fatigue
- Dizziness, Balance problems Nausea and vomiting Numbness or Tingling Ringing in ears
- Impaired sleep (more, less, or fragmented) Blurry or double vision Trauma associated seizures
- Other: _____ Other _____

COGNITIVE:

- Slowed information processing Difficulty with Attention and concentration "Brain fog" Difficulty with memory
- Trouble learning new information or retaining it Unable to follow instruction Inability to multitask or organize
- Difficulty tracking conversations Feeling "slowed down"
- Other: _____ Other _____

SOCIAL-EMOTIONAL:

- Poor emotional regulation Irritability or quick to anger Unusual sadness Decreased motivation,
- Anxiety or depression Post-traumatic stress disorder Grief Loss of social skills Withdrawal from friends and family
- Other: _____ Other _____

Activity Restrictions: Y/N Describe: _____

Medical instructions from Provider or Athletic Trainer for Activity Modification: Y / N Date: _____

Return to full physical activity during school. Y/N Date: _____

Accommodations

(See: [ODE's Symptom-Based Accommodation Guide](#))

PHYSICAL

- Allow rest breaks with low light and noise at _____
- Wear sunglasses and/or hat in class, seating away from bright sunlight
- Allow hearing protection or unplugged, noise-reducing headphones during class
- Limit screen time by offering assignments by book and paper, when possible.
- Provide a lunchtime space away from crowded areas.
- Leave class 5 minutes early or late to avoid crowding in halls
- Other: _____
- Other: _____
- Other: _____

COGNITIVE

- Preferential seating and provide immediate feedback
- Break down assignments and tests into shorter segments
- Shorten in-class and homework assignments to key concepts and critical tasks only
- Reduce or slow down verbal information and check for comprehension
- Teacher generated class notes and/or recorded lecture
- Allow extended time to complete coursework, assignments, and tests if requested
- Stagger testing so that the student only needs to prepare for one exam/quiz per day
- Alternatives to written output for demonstrating understanding: _____
- Other: _____
- Other: _____
- Other: _____

SOCIAL-EMOTIONAL

- Teacher/staff to provide reassurance about accommodations and workload reduction
- Permit lunchtime in a quiet space with 1-2 friends
- Allow student to work with a peer or peer group for selected assignments
- Give non-verbal cues to stay on task or change behavior
- Pass to wellness room or counseling center to regroup when upset
- Utilize an emotional and behavioral support plan
- Other: _____
- Other: _____
- Other: _____

Date of first review (within 5 days of ITAP implementation): _____ Completed Date: _____

Date of next review (no later than two months): _____ Completed Date: _____

Evaluation under Section 504, or IDEA initiated? Y / N Date: _____ Eligible: Y/N

ITAP shared with parent/guardian and required school staff? Y / N Date: _____

Date Temporary Accommodations Plan Discontinued: _____

Notes: _____

Directions for Completing the ITAP Form

Complete this form in accordance with House Bill 3007 (2025) and OAR 581-021-3007 upon receiving written notification from a qualified health care provider that a student has a concussion or other brain injury. It should be completed promptly and reviewed regularly by the Brain Injury Management Team.

Student Information

- **Student / DOB / ID# / School / Grade:** Enter student's full name, birth date, ID, school, and grade.
 - **TBI Sustained On:** Date of injury.
 - **Date Written Notification Received:** Date the school received notification from parent/guardian.
 - **Return to School Anticipated:** If known, note date.
 - **Date ITAP Completed On / By:** Date completed and name of lead staff.
 - **Other Team Members Consulted:** List all consulted.
 - **Parent/Guardian & Contact and Medical Provider & Contact:** Fill in names and best contacts.
-

Medical Documentation & Initial Needs

- **Medical Documentation Date / Notes:** Enter date and summarize notes.
 - **Abbreviated Day Recommended?** Circle **Y** or **N** and explain if "Yes."
 - **Related Medication in Health Room?** Circle **Y** or **N** and list medication if applicable.
-

Signs and Symptoms

- Check all that apply under **Physical**, **Cognitive**, and **Social-Emotional** based on student or provider input.
 - Use "Other" lines for symptoms not listed.
-

Activity Restrictions

- Circle **Y/N** for restrictions, describe if "Yes."
 - Note medical instructions for activity modification and date received.
 - Record clearance date for full physical activity.
-

Accommodations

- Check all that apply using ODE's Symptom-Based Accommodation Guide under **Physical**, **Cognitive**, and **Social-Emotional**:
 - Use "Other" lines for additional accommodations.
-

Review and Follow-Up

- **First Review:** Within 5 school days of implementation.
 - **Next Review:** No later than 2 months after implementation.
 - **504/IDEA Evaluation:** Indicate Y/N, initiation date, eligibility.
 - **ITAP Shared with Parent/Staff:** Circle Y/N, note date.
 - **Plan Discontinued:** Date
 - **Notes:** Add any additional notes needed to track implementation and progress of student.
-

Key Reminders

- The plan must remain in effect until formally revised or discontinued by the Brain Injury Management Team.
- Adjustments must be made as symptoms change—progress may not be linear.
- Keep a copy in the student's record, share with parent/guardian and with all staff responsible for implementation.

Summary

Meeting Date: 10/16/2025

Title: Accommodations for Students with Concussions or Other Brain Injuries (OAR-581-021-3007)

Status: First Reading

Presentation: Yes

Key Staff: Ely Sanders, School Health Services Specialist

Topic Summary: Recommendation to adopt Temporary OAR 581-021-3007 as a permanent OAR. Temporary OAR 581-021-3007 requires public education providers to follow ODE procedures for immediate accommodations when notified of a student's concussion or brain injury. Making OAR 581-021-3007 permanent is required to clarify ongoing school district requirements of HB 3007.

ODE Education Equity

Stance

Education equity is the equitable implementation of policy, practices, procedures, and legislation that translates into resource allocation, education rigor, and opportunities for historically and currently marginalized youth, students, and families including civil rights protected classes. This means the restructuring and dismantling of systems and institutions that create the dichotomy of beneficiaries and the oppressed and marginalized.

BACKGROUND AND NEED

Members of the State Board of Education are volunteers, with unique professional and lived experiences. Using plain language, this section should provide context for this item, including any needed overviews of relevant programs or initiatives.

- Briefly, how does this topic, program, or initiative currently operate? Where is it located within Oregon's school systems? How does it ultimately serve students?**

[ORS 336.495](#) (2020), known as Jenna's law, requires the Oregon Department of Education (ODE) to develop a form for public education programs to use when a student has been diagnosed with a concussion or other brain injury. ODE was required to make the form available for use by educators and other program employees, students, parents, or guardians. ORS 336.495 **did not** have a requirement for public education programs to use the ODE form or follow ODE procedures when a student is diagnosed with a concussion or other brain injury.

The passage of [House Bill 3007](#) (June 2025) and the adoption of [Temporary OAR 581-021-3007](#) (June 2025) established a consistent and timely process for addressing student needs following a health event. Through significant engagement with education and health partners, the Oregon Department of Education (ODE) developed required procedures, the Immediate Temporary Accommodations Plan (ITAP) form, and related implementation resources.

These measures serve students by ensuring that:

- Schools can provide prompt and equitable access to necessary academic accommodations while longer-term supports, such as Section 504 or IEP plans, are considered.

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- Procedures are standardized statewide, promoting consistency and reducing variability in how schools respond to students experiencing temporary health-related barriers to learning.
- School staff receive training and technical assistance from ODE, strengthening local capacity to implement the law effectively.
- Students remain engaged in their education with minimal disruption during recovery or transition periods.

Collectively, these actions promote educational continuity, equity, and student well-being through coordinated and timely support systems across Oregon schools.

ODE’s School Health Services Specialist, positioned in the Office of Equity, Diversity, and Inclusion, is available to answer questions and support districts in use of the form.

2. Please list the specific rule(s), statute(s), or recently passed legislation that allows the Board to take action on this item. Where are they prescriptive and where do they provide the Board and Department flexibility?

House Bill 3007 (2025) establishes that when a public education provider receives written notification from a parent or guardian that a student has been diagnosed with a concussion or other brain injury, the public education provider shall follow all procedures developed by ODE to develop and implement an immediate and temporary accommodation plan. In addition, a public education provider shall use a sample form developed by the department or a district form that includes all content from the department’s sample form when developing the accommodation plan. ODE believes this provides authority for the State Board of Education to take action on this item.

Temporary OAR 581-021-3007 expires December 14, 2025. ODE is recommending that the State Board of Education adopt Temporary OAR 581-021-3007 as permanent with no changes to the temporary OAR language.

3. Has this item come before the Board before? If so, when did the Board last take action, and what was that action?

Yes, the State Board of Education adopted Temporary OAR 581-021-3007 on June 12, 2025.

4. Why is this item coming before the Board now?

A Permanent OAR is necessary to meet requirements in HB 3007. HB 3007 established new requirements for ODE and public education providers but requires further specification in rule to support effective initial public education program implementation. ODE is recommending that the State Board of Education adopt Temporary OAR 581-021-3007 as permanent with no changes to the temporary OAR language. Temporary OAR 581-021-3007 expires December 14,

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2025. A permanent OAR will ensure that the following components of Temporary OAR 581-021-3007 don't expire:

- Clarification of use of "Sample form."
- Clarification that procedures developed by the Department must be used by public education providers to develop and implement an immediate and temporary accommodations plan for a student who has been diagnosed with a concussion or other brain injury.
- Clarification of terms and mandates in HB 3007.
- Clarification of district requirements regarding components of an accommodation plan.

5. Who requested or brought about the need for this item? (Select all that apply.)

- ODE Staff
- Students
- Families
- Community-Based Organizations
- Culturally Specific Organizations
- School Districts
- Education Service Districts
- Charter Schools
- Oregon State Legislature
- Educational Associations
- Racial Justice Council
- Federal Government
- One or more of Oregon's nine federally recognized tribes: _____
- Other: _____

ENGAGEMENT STRATEGY AND LEARNINGS

The State Board of Education expects all items that come before it be reviewed and influenced, to the greatest extent possible, by a robust community engagement process. Using plain language, this section should provide an overview of the role that engagement played in this item, including with Oregon's nine federally recognized Tribes, other state agencies, and external partners.

6. How did the [Equity Decision Tree](#) inform your office/team engagement strategy? Who is most likely to be affected and how have they been intentionally incorporated into the engagement process for this item?

ODE conducted engagement with key knowledgeable partners including the Oregon Health Authority and the Oregon Department Education's Brain Injury Work Group, School Nurse Concussion work group, ESD administrators, the Coalition of School Administrators (COSA), Oregon School Board Association (OSBA), Oregon School Athletic Association (OSAA), and ODE's Ongoing Rules Committee Advisory (ORCA).

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ODE utilized the Equity Decision Equity Tree as the agency reviewed Temporary OAR language, developed required procedures, sample form, guidance, and training.

7. **After consulting with ODE’s Rules Coordinator and the Office of Indian Education, did this item require Tribal Consultation and/or Tribal Communication with Oregon’s nine federally recognized tribes? (For more information, please reference ODE’s [Tribal Consultation Toolkit](#).)**

- No
- Yes – Both Consultation and Communication.
- Yes – Only Communication.

8. **Has your office/team considered how this item intersects with the authority of other state entities that serve the health and education needs of Oregon’s students, or otherwise contribute to the climate of Oregon’s school systems? If so, please select from the below list.**

- N/A; this item does not intersect with other state entities.
- Oregon Health Authority (OHA)
- Department of Early Learning and Care (DELIC; formerly ELD)
- Educator Advancement Council (EAC)
- Higher Education Coordinating Commission (HECC)
- Youth Development Oregon (YDO)
- Teacher Standards and Practices Commission (TSPC)
- Oregon Housing and Community Services (OHCS)
- Other: _____

If you selected any of the above entities, please share why they were involved, how the Department partnered with them, and what feedback they provided.

ODE met directly with OHA representatives individually and as part of a larger engagement session. OHA representatives reviewed temporary rule language, provided their input, and support the temporary and permanent rules.

9. **Which geographic perspectives are intentionally represented in your office/team engagement strategy?**

- Northeast Oregon
- Central and Southeast Oregon
- Southwest Oregon
- Willamette Valley and Central Coast
- Northwest Oregon
- Tribal lands
- Other: OAR is applicable to school districts across all of Oregon. ODE did look specifically at impact in relation to small/rural school districts as well as large/urban districts.

Why did your office/team focus on the above geographical perspective(s)?

ODE recommends the permanent adoption of temporary OAR 581-021-3007. ODE did extensive engagement with statewide partners including included OHA and the ODE's Brain Injury Work Group, School Nurse Concussion work group, ESD administrators, COSA, OSBA, OSAA, ODE's small school specialist, and ORCA.

10. Please highlight some of the key pieces of feedback your office/team received during the engagement process. How did this feedback influence the development of this item? How were differences in opinion accounted for?

Engagement revealed that the OAR 581-021-3007 should be made permanent to ensure consistent and effective implementation within public education programs. Specific key points discussed in these conversations included:

- Need for written notification to include evidence of diagnosis of a concussion or other brain injury
- Role of a school nurse and/or other medically licensed school staff

ODE presented this rule to ORCA on June 5, 2025, as part of the Temporary OAR process, and again on October 2, 2025, for the Permanent OAR process. Key points and concerns from these discussion relevant to the Board's consideration of this rule included the following:

- **Recipient of Notification:** Participants were concerned that parents may lack clarity on who within a "public education provider" should receive concussion notification and forms; ODE has addressed this in procedures and guidance.
- **Role of School Nurse/Athletic Trainer Assessment:** The initial temporary rule draft had a requirement for an assessment by a school nurse or athletic trainer as part of the accommodations plan development process to determine and immediately implement necessary physical activity limitations and accommodations, with a focus on safety and recovery. A participant shared concern that this could hinder a public education program's ability to develop an accommodations plan and ultimately cause a delay in providing necessary accommodations to impacted students. These procedures would have involved evaluating all school-related physical activities, identifying current symptoms, and providing temporary academic, behavioral, and emotional supports. This provision was removed from the temporary rule and will be further considered during the development of procedures by ODE over the summer and in the permanent rulemaking process planned for Fall 2025.
- **Accountability:** Participants were concerned about implementation of the accommodation plans required under HB 3007 and procedures to be followed if implementation does not occur. HB 3007 requires parent notification of the accommodations plan but does not contemplate an enforcement mechanism. ODE included parent notification requirements related to ITAP implementation.
- **Medical Documentation Requirement:** The temporary rule includes a requirement for medical documentation to support the parent's notification of the concussion or other

brain injury. Medical documentation enables the public education program to ensure appropriate planning based on the student’s health condition(s). However, participants shared that requiring medical documentation could present access barriers for families.

Based on this engagement, ODE revised the temporary rules to ensure sufficient information was included to support the effective implementation of HB 3007, while prescribing the fewest possible requirements for public education programs until further engagement can be completed during permanent rule making.

All other feedback was positive, and no other concerns related to the draft temporary rule language were raised.

ODE made no changes to the Temporary OAR language. ODE is recommending that the State Board of Education Adopt Temporary OAR 581-021-3007 as permanent.

11. Please describe any additional engagement opportunities your office/team will be pursuing prior to asking the Board to take action on this item.

ODE has scheduled two additional office hour engagement opportunities for October 27th and 28th, 2025. ODE will present OAR 581-021-3007 to the ORCA on November 13, 2025.

FISCAL AND ADMINISTRATIVE IMPACT ANALYSIS

Equitable resource allocation is a critical component of education equity. Using plain language, this section should describe the fiscal, administrative, and small business impacts of this item, and how it affects the larger social system that serves Oregon’s students.

12. After consulting with ODE’s Rules Coordinator and Grant Consolidation Team, was this item identified as a grant-related item?

- No
- Yes; please review Appendix B: Grant Consolidation below.

13. Will Board action create fiscal or administrative impacts on districts, ESDs, community-based organizations, and/or the nine federally recognized tribes? If so, please describe the anticipated short- and long-term effects and how they may be felt differently in small, rural, or remote communities.

Yes, Board action will create administrative impacts on districts and ESDs. The proposed OAR will require public education providers to:

Short-term effects:

- Implement new procedures for developing accommodation plans when students are diagnosed with concussions

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- Train staff in the new requirements and procedures
- Allocate staff time to complete required documentation and accommodation plans
- Adapt existing practices to comply with the new requirements

Long-term effects:

- Maintain ongoing compliance with accommodation plan requirements
- Continue staff training on concussion protocols and accommodation planning
- Monitor implementation of accommodation plans

Differential impacts on small, rural, or remote communities:

- These communities may face greater challenges due to limited access to specialized staff (such as school nurses or athletic trainers).
- Rural areas may have fewer resources to implement new administrative requirements.
- Families in remote areas may face barriers to obtaining required medical documentation due to healthcare access limitations.
- Smaller districts may need to assign additional responsibilities to existing staff who already have multiple roles.

14. Will Board action create a fiscal or administrative impact on state agencies, units of local government, and/or the public? Will it increase costs associated with compliance for small businesses?

ODE anticipates the following fiscal or administrative impacts:

State agencies:

- ODE has developed and will need to maintain sample forms, procedures, and guidance materials.
- ODE staff will need to provide technical assistance to districts implementing the requirements.
- Oregon Health Authority may face increased consultation requests related to concussion management.

Units of local government:

- School districts will face administrative burdens as outlined in Question 13.
- ESDs may need to provide additional support to their member districts.

The public:

- Parents/guardians will need to provide written notification when their child is diagnosed with a concussion.
- Families will need to obtain medical documentation, potentially incurring healthcare costs.
- The public may benefit from improved concussion management for students.

Small businesses:

- Small businesses are unlikely to face direct compliance costs.

EQUITY IMPACT ANALYSIS

The State Board of Education envisions an aspirational education system that honors its increasingly diverse student body and affirms every student to reach their full potential in a rapidly shifting global environment. Using plain language, this section should describe the impact of this item on students and the larger social system that serves their health and education needs.

15. How will Board action on this item ultimately impact students and their families, particularly those who have been and continue to be systemically marginalized?

Board action on this item will have significant impacts on students with concussions and brain injuries, with both benefits and potential challenges for systemically marginalized communities:

Benefits:

- Creates standardized procedures ensuring all students receive appropriate accommodations after brain injuries
- Establishes clear expectations for schools to respond promptly to concussion diagnoses
- Supports student recovery through structured accommodation plans
- May reduce educational disruptions during recovery periods

Impacts on marginalized communities:

- The medical documentation requirement could create disproportionate barriers for students from low-income families, rural communities, and communities of color who face healthcare access challenges.
- Families with limited English proficiency may struggle to navigate notification procedures without adequate translation/interpretation support.
- Families experiencing housing instability or transportation barriers may face additional challenges obtaining required documentation.

The rule ultimately aims to improve outcomes for all students with brain injuries, but implementation will require careful attention to ensure equitable access to accommodations across communities. The permanent rulemaking process will need to address these potential disparities through inclusive engagement and development of accessible procedures.

16. How will Board action on this item ultimately impact school district employees and volunteers, particularly those who have been and continue to be systemically marginalized?

Board action on this item will impact school district employees and volunteers in several ways:

General impacts on staff and volunteers:

- Creates new procedural responsibilities for developing and implementing accommodation plans

- Requires familiarity with concussion protocols and documentation requirements
- Adds administrative workload, particularly for those who receive concussion notifications
- Necessitates coordination between classroom teachers, administrators, and support staff

Impacts on systemically marginalized employees and volunteers:

- Staff in schools with fewer resources may shoulder additional responsibilities without adequate support.

17. What are the anticipated short- and long-term consequences of Board action on this item? Will Board action have a cumulative effect on students, families, educators, districts, or Oregon's school systems?

Short-term consequences:

- Initial implementation challenges as schools develop systems to comply with the new requirements
- Increased administrative workload for staff responsible for accommodation planning
- Learning curve for educators to understand and implement appropriate concussion accommodations
- Immediate need for communication systems between families, medical providers, and schools
- Potential inconsistencies in implementation as districts interpret temporary rules differently

Long-term consequences:

- Standardized protocols for addressing student concussions across all Oregon public education programs
- Improved support for students recovering from brain injuries
- Increased awareness among educators about concussion impacts on learning
- Development of expertise within schools for managing concussion accommodations
- Better coordination between health providers and education systems around brain injury management

Cumulative effects:

- Adds to the growing body of specialized accommodation requirements that schools must implement
- May exacerbate resource and staffing challenges in districts already struggling with capacity
- May highlight inequities in healthcare access among student populations
- Will contribute to the evolution of Oregon's approach to supporting students with temporary medical needs

- Could strengthen overall systems for responding to student health needs in educational settings

The combined effect will be a more structured approach to concussion management in schools, though implementation quality will likely vary based on district resources and capacity.

18. What are the anticipated short- and long-term consequences of inaction on this item and who would experience those consequences?

Short-term consequences of inaction:

- Public education providers would lack clear guidance on HB 3007 requirements for the 2025-2026 school year and beyond
- Inconsistent implementation of concussion accommodation processes across the state
- Confusion among districts about their legal obligations regarding form usage and accommodation plan development
- Delayed implementation of required concussion protocols
- Non-compliance with the legislative mandate in HB 3007
- Students with concussions receive inconsistent support depending on their district's interpretation of the law

Long-term consequences of inaction:

- Prolonged variability in concussion management practices across Oregon
- Potential harm to students whose recovery needs aren't adequately accommodated
- Increased liability risks for districts operating without clear regulatory guidance
- Erosion of trust between families and schools regarding health accommodation needs
- Missed opportunities to establish effective brain injury management protocols in educational settings

Who would experience these consequences:

- Students with concussions would face the most direct impact, potentially experiencing inadequate accommodations that could affect their recovery and academic success
- Families would bear the burden of advocating for appropriate accommodations without standardized processes

Inaction would particularly disadvantage students and families with limited resources to advocate for themselves within complex educational and medical systems.

RECOMMENDED ACTION

The State Board of Education has dedicated itself to challenging the status quo and sharing responsibility for every student's academic and lifelong success. Using plain language, this section should describe the choice before the Board, the Department's recommendation, and any other relevant information.

19. Please provide a brief summary of the specific language your office/team is bringing to the Board. Are there any key decisions within this language that your office/team would like the Board to make?

ODE is recommending that the State Board of Education adopt Temporary OAR 581-021-3007 as permanent with no changes to the temporary OAR language. OAR language closely mirrors the language of HB 3007 except for the following areas where ODE recommends new clarifying language.

- *(1)(c) "Written notification" means a written notice from a parent or guardian, supported by medical documentation from a health care professional, informing the public education provider that they are requesting an accommodation for a student who has been diagnosed with a concussion or other brain injury by a health care professional.*

Language is aligned with the intent of HB 3007 that a diagnosis of a concussion or other brain injury has occurred and will ensure medical documentation is available to verify diagnosis, inform determination of accommodations and ensure safety of student.

- *(2) When a public education provider receives written notification from a parent or guardian that a student has been diagnosed with a concussion or other brain injury, the public education provider shall follow all procedures developed by the Oregon Department of Education to develop and implement an immediate and temporary accommodation plan.*

Language is aligned with the intent of HB 3007 and clarifies that public education providers are required to follow all procedures developed by ODE.

- *(3) A public education provider shall use a sample form developed by the department or a district form that includes all content from the department's sample form when developing the accommodation plan described in section (2) of this rule.*

Language is aligned with the intent of HB 3007 and clarifies that public education providers shall use a sample form developed by ODE. New language clarifies that districts may use a district form as long as it includes all content from ODE's sample form.

- *(4)(b) In considering the requirements of section (3)(a) of this rule, the public education provider shall consider all physical activities accruing while the student is in school, at a school-sponsored activity, under the supervision of school personnel, in before-school or after-school care programs on school-owned property, and in transit to or from school or school-sponsored activities, including but not limited to physical education, recess, unstructured play and similar activities provided by or sponsored through the*

public education provider that involve running, jumping, climbing, throwing, catching or other movements that pose a risk of falls, collisions or physical injury.

Language clarifies that public education providers must consider physical activities outside of class time. This is aligned with OAR 581-021-0037 (Medication Administration) and OAR 581-022-2220 (Health Services).

- ***(5) Nothing in this rule prohibits a public education provider from determining that a student needs an immediate and temporary accommodation plan without receiving written notice from the parent or guardian that the student has been diagnosed with a concussion or other brain injury.***

Language clarifies that nothing in this OAR prevents a public education provider from determining and implementing immediate and temporary accommodations for a student for whom they have not received written notification of a concussion or brain injury. Public education providers continue to have the discretion to limit a student’s physical activity if they suspect a student has a concussion or other brain injury.

20. How is this language responsive to identified needs and/or feedback received through the engagement process? How is it in alignment with [the Board’s Mission, Vision, and Values](#)?

Based on partner engagement, OAR 581-021-3007 includes sufficient information to support effective implementation of HB 3007, while minimizing requirements for public education programs until further engagement can occur during permanent rulemaking. ODE believes this approach aligns with the Board’s Mission, Vision, and Values by allowing time for broader input to ensure procedures are developed in an inclusive, equitable manner that reflects Oregon’s diversity.

21. Please describe the action your office/team is recommending to the Board (for example, the adoption of rules or the approval of a waiver) and how it reflects the Department’s commitment to academic excellence, belonging and wellness, and reimagining accountability.

ODE is recommending that the State Board of Education adopt Temporary OAR 581-021-3007 as permanent with no changes to the temporary OAR language. This will allow the Board to fulfill its responsibility to implement HB 3007 and ensure consistent district implementation of new requirements.

22. Please note any additional support the Department is (or will be) providing to ensure successful implementation of this item.

- N/A; this item does not require any additional support.
- Communications plan
- Technical assistance, professional development, and/or coaching
- Direct or differentiated support for small, rural, or remote school districts

Oregon State Board of Education Docket

- Corrective Action Processes
- Safety measures
- Organizational culture or practice changes (change management)
- Materials and/or supplies
- Guidance and/or supplemental resources
- Other: ODE has developed required [Brain Injury Procedures](#) as well as a sample [Immediate and Temporary Accommodations Plan \(ITAP\) Form](#)

23. Has this item changed since the last Board meeting?

- N/A; this item has not previously been before the Board
- No; same as last month
- Yes; please review Appendix A: Second Reading below.



Supported Decision Making: At-A-Glance for Educators

DISCLAIMER: This document is intended solely for informational purposes. It's use is not mandatory, and school districts are encouraged to seek legal counsel to ensure compliance with state and federal law.

This guide provides educators with the information and tools needed to implement Supported Decision-Making, a process that empowers disabled students and students experiencing disabilities to make their own choices with support from trusted individuals. By integrating Supported Decision-Making into your practice, you can help students build skills for a more independent future.

Educator's Legal Responsibilities

Oregon Revised Statute (ORS) 343.181(2) requires school districts to “provide the child and the child’s parents with information and training resources regarding supported decision-making as a less restrictive alternative to guardianship.”

What is Supported Decision-Making?

Supported Decision-Making is a process where individuals with disabilities make their own decisions with help from people they select. In an educational context, Supported Decision-Making:

- Aligns with IDEA requirements for student participation.
- Supports the development of self-determination skills, a key foundation for post-school success.
- Serves as a less restrictive alternative to guardianship.
- Applies to educational, vocational, and personal decisions.
- Can be implemented informally or through formal written agreements.

The Educator's Critical Role

As an educator, you are essential in preparing students for a successful transition to adulthood. Your role in Supported Decision-Making includes:

- Introducing Supported Decision-Making concepts to students and their families.
- Teaching and reinforcing decision-making skills throughout a student's K-12 education.
- Supporting and documenting student participation in their own educational decisions, including IEP meetings.
- Preparing students for the transfer of rights that occurs at age 18.

Integrating Supported Decision-Making into Educational Practice

Elementary (K-5)	Middle School (6-8)	High School (9-12)
<ul style="list-style-type: none">• Embed choice-making opportunities throughout the day.	<ul style="list-style-type: none">• Increase student leadership in IEP meetings.	<ul style="list-style-type: none">• Explicitly teach about transfer of rights and adult decision-making.



Supported Decision Making: At-A-Glance for Educators

Elementary (K-5)	Middle School (6-8)	High School (9-12)
<ul style="list-style-type: none"> • Teach students to identify and communicate their preferences. • Introduce problem-solving frameworks and decision-making steps. • Involve students in parts of their IEP meetings. • Have students practice expressing opinions and listening to others. 	<ul style="list-style-type: none"> • Teach students to articulate strengths, challenges, and needs. • Introduce Supported Decision-Making concepts in age-appropriate language. • Support students in identifying trusted supporters. • Develop self-advocacy vocabulary and skills. 	<ul style="list-style-type: none"> • Facilitate student-led IEP meetings. • Support creation of formal Supported Decision-Making agreements when appropriate. • Connect Supported Decision-Making to transition assessments and planning. • Document Supported Decision-Making discussions in transition IEPs.

Including Supported Decision-Making in the IEP

- Ensure the student’s decision-making skills are documented in the present levels of functional performance, including their preferences, decision-making support needs, and specific Supported Decision-Making strategies that work for the student.
- Develop measurable annual goals related to self-advocacy, self-determination, and decision-making skills, when appropriate
- Document discussions about Supported Decision-Making in meeting notes

Addressing Common Challenges

Challenge	Educator Strategies
Family preference for guardianship	Provide balanced information on all options; invite adult service providers to explain less restrictive alternatives; and share success stories.
Student struggles with communication	Identify and implement effective communication methods and supports (e.g., assistive technology); recognize and respect all forms of expression.
Difficulty assessing decision-making capacity	Focus on specific, situational assessments rather than global capacity; document growth over time to show progress. If a student consistently struggles to make choices even with extensive support, it may be a sign to convene the IEP team to discuss more intensive strategies.
Balancing safety and autonomy	Use a supported risk assessment process; create safe opportunities for students to learn from natural consequences. If a student’s choices pose a significant risk of harm that cannot be mitigated, consult with the support team and administration.



Supported Decision Making: At-A-Glance for Educators

Supported Decision-Making Implementation Checklist for Educators

- ☑ **Introduce** and discuss Supported Decision-Making concepts with students and families.
- ☑ **Assess** each student's current decision-making skills and needs.
- ☑ **Incorporate** specific decision-making and self-advocacy goals into IEPs when appropriate.
- ☑ **Create** consistent classroom opportunities to practice making decisions.
- ☑ **Document** student preferences and the supports that work best for them.
- ☑ **Discuss** the transfer of rights with students and families beginning at age 16, or earlier if appropriate.
- ☑ **Connect** families with resources and training on Supported Decision-Making.
- ☑ **Include** Supported Decision-Making strategies and student decision-making supports in the Summary of Performance.



Supported Decision Making: At-A-Glance for Parents

As a parent, you want your child or adult student to have a full, self-directed life. Supported Decision-Making is a powerful tool to help them get there. It's an approach that empowers your child or adult student to make their own choices while building a trusted network of support for guidance. By using Supported Decision-Making, you can help your child or adult student develop essential life skills, grow in confidence, and prepare for a successful future where their voice is always at the center of their life decisions.

Navigating the special education process is a journey, and our goal is to provide you with clear, accurate, and practical information to serve as your guide. We want to empower you as an essential member of your child's team.

Please know that while we strive for accuracy, this material is for informational purposes only. It is not intended as legal advice, and reading it does not create an attorney-client relationship. Because special education law is complex and every student's situation is different, this guidance should not be used as a replacement for individualized advice from a qualified professional.

What Is Supported Decision-Making?

Supported Decision-Making allows your child or adult student to be the primary decision-maker in their own life. Instead of someone else making choices *for* them, your child or adult student works with people they trust—family, friends, teachers, and mentors—to understand their options, weigh the advantages and disadvantages, and communicate their choices and decisions.

The benefits of this approach are clear:

- **Preserves Dignity and Rights:** Your child or adult student maintains their legal right to make decisions.
- **Builds Essential Life Skills:** Decision-making, like any skill, improves with practice.
- **Promotes Self-Confidence:** Empowers your child or adult student to express their preferences and see themselves as capable.
- **Prepares for Adulthood:** Creates a strong foundation for greater independence and self-advocacy.

Supported Decision-Making vs. Guardianship: Understanding the Difference

Every individual is unique, and the right level of decision-making support will vary. The goal is to find the least restrictive approach that ensures your child or adult student's safety while maximizing their independence. It's helpful to think of the options as a spectrum of support, not an all-or-nothing choice.



Supported Decision Making: At-A-Glance for Parents

Supported Decision-Making	Guardianship
Your child or adult student makes their own decisions with help from a support network.	A court-appointed guardian makes decisions for your child or adult student in specific or all areas.
No court involvement is required. It's flexible and can be changed easily.	Requires a legal process and ongoing court oversight to establish, modify, or terminate.
Builds decision-making skills and independence over time.	May limit opportunities for individuals to practice and develop their own decision-making skills.
The best first step when an individual can express preferences (in any way) and participate in the process with support.	May be necessary only when there is a significant risk of harm that cannot be managed through less restrictive means, even with extensive supports.

Oregon law encourages families to explore less restrictive alternatives like Supported Decision-Making *before* considering guardianship. Both Supported Decision-Making and guardianship have their place, and the best choice depends on each individual's unique circumstances.

Starting Supported Decision-Making at Home

Begin building a foundation for Supported Decision-Making today with these practical steps:

- 1. Practice Daily Decisions:** Offer choices about meals, clothes, and activities. Start with two options and gradually add more complexity as your child or adult student's confidence grows.
- 2. Talk It Out:** When making a family decision, think out loud. Explain the options you're considering and why you're leaning one way. This models the process for your child or adult student.
- 3. Build a Circle of Support:** Help your child or adult student identify people they trust. Ask, "If you had a question about school, who would be a good person to ask?" or "Who helps you feel brave when you're trying something new?"

Conversation Starters

Starting the conversation is a key first step. Here are a few ideas:

With your child or adult student:

- "I'd love to hear your thoughts on [a specific decision, like a weekend activity]. What are your ideas?"
- "Let's figure this out together. Who are some people we trust that could help us think through the options for [a bigger decision, like a summer job]?"

With the school/IEP team:



Supported Decision Making: At-A-Glance for Parents

- “We are using Supported Decision-Making at home and want to discuss how we can build on that at school.”
- “Could we add a goal to the IEP that focuses on [child or adult student’s name]’s decision-making and self-advocacy skills?”
- “How can we make sure [child or adult student’s name] has a central role in their next IEP meeting?”

Take the Next Step: Your Action Plan

Ready to move forward? Here’s what you can do now:

1. **Talk it Out:** Begin conversations about who they trust and would want to help them make decisions.
2. **Connect with the School:** Ask your child or adult student’s teacher or case manager about incorporating Supported Decision-Making goals and practices into their school day and their IEP.
3. **Learn More:** Explore the resources below to connect with other families and find more tools.

Resources for More Information

- **National Resource Center for Supported Decision-Making:** <http://www.supporteddecisionmaking.org/>
- **The Arc Oregon:** <https://www.thearcoregon.org/>
- **FACT Oregon:** <https://factoregon.org/>
- **Disability Rights Oregon:** <https://www.droregon.org/>

Remember: All people need support with decisions at times. Supported Decision-Making recognizes that needing help doesn’t mean a person can’t make their own choices. By implementing Supported Decision-Making, you’re helping your child or adult student build skills for a more independent future while ensuring they have the support they need to succeed.



YOUR Life, YOUR Choices: Supported Decision-Making

A Note Just For YOU

This guide is a tool to help you learn, practice, and build your confidence. It gives you ideas and information, but it's not the same as getting legal advice from a lawyer. Your life and your goals are unique. Making big decisions sometimes means getting expert help, and that's a smart choice **YOU** can make!

What Is Supported Decision-Making?

Supported Decision-Making means **YOU** make your own decisions about your life with help from people you trust. **YOU** stay in charge, but you get the support you need to understand your options and make good choices.

Why This Matters to YOU

When you turn 18, you have the legal right to make your own decisions about:

- Where you live
- Where you work or go to school
- How you spend your money
- What medical care you get
- Who you spend time with
- And much more!

Your Rights, Your Voice

- **YOU are the expert** on your own life
- **YOU get to choose** who helps you make decisions
- **YOU have the final say** even if your supporters disagree
- **YOU can change your mind** or choose different supporters

How Supported Decision-Making Works

1. **YOU decide** what decisions you want help with
2. **YOU choose** who you trust to help with different decisions
3. **YOU work with** your supporters to understand your options
4. **YOU make** the final decision
5. **YOU take action** with help if needed

Who Can Be Your Supporters?

Anyone **YOU** trust and feel comfortable with:

- Family members
- Friends
- Teachers or school staff
- Coaches or mentors
- Other trusted adults

Different people can help with different types of decisions!



YOUR Life, YOUR Choices: Supported Decision-Making

Examples of How Supported Decision-Making Works

School Decisions:

“I want to choose my classes for next year. My teacher helps me understand what each class is about, and my older sister helps me think about which ones match my interests. I make the final choice about which classes to take.”

Work Decisions:

“I want to find a job. My job coach helps me look for openings, my dad helps me practice interview questions, and my friend helps me figure out transportation. I decide which jobs to apply for and accept.”

Health Decisions:

“I need to understand my medication. My doctor explains what it does, my mom helps me remember when to take it, and my case manager helps me track how it makes me feel. I decide whether the medication is working for me.”

What This Looks Like In School

A specific section that provides concrete examples of how students can use SDM in their daily school life, such as in IEP meetings or when choosing classes. What should this look like???

Getting Started with Supported Decision-Making

- **Think about** what decisions are important to you
- **Identify** who you trust to help with different decisions
- **Talk to** those people about how they can support you
- **Practice** making decisions with their support
- **Share** your Supported Decision-Making plan with your school and others

Remember:

- Everyone needs help with decisions sometimes
- Asking for help is a strength, not a weakness
- You can start small and try bigger decisions as you practice
- Your support needs might change over time - that's OK!
- **YOU** are the expert on what works best for you



Less Restrictive Alternatives to Guardianship: Educational Decision-Making Guide

DISCLAIMER: This document is intended solely for informational purposes. It's use is not mandatory, and school districts are encouraged to seek legal counsel to ensure compliance with state and federal law.

Purpose and Overview

This guide helps Oregon families, students, and school teams explore alternatives to guardianship that support students in making their own educational decisions. These alternatives preserve student rights while providing needed support.

Key Message: Guardianship removes a person's legal rights and should only be considered when all other options have been tried and proven insufficient. Most students can make their own decisions with the right support.

Why This Matters: When students turn 18, they become legal adults with the right to make their own educational decisions. This guide helps teams prepare students for this responsibility while ensuring they get the support they need.

Key Principles for Choosing Alternatives

- **Presumption of Competence**
 - **All students are presumed capable of making decisions.**
 - Disability does not equal incapacity.
 - Communication differences do not mean inability to choose.
 - Start by assuming support, not substitution, is needed.
 - Example: A student who takes longer to process information is not incapable. They just need more time.
- **Least Restrictive Support for Decision-Making**
 - **Use only the support actually needed.**
 - Different decisions may need different levels of support.
 - Preserve autonomy wherever student shows capacity.
 - Regularly reassess and reduce restrictions when possible.
 - Example: A student might need help understanding financial aid but can independently choose their classes.
- **Student-Centered Approach**
 - **The student is the expert on their own life.**
 - Honor student preferences for who provides support.
 - Respect all communication methods.
 - Include the student in every discussion about their support needs.
 - Document the student's own goals and dreams.
 - Example: If a student trusts their sibling more than their parent for certain decisions, honor that preference.



Less Restrictive Alternatives to Guardianship: Educational Decision-Making Guide

Understanding the Continuum of Decision-Making Support

Decision-making support exists on a continuum from least to most restrictive. The goal is to identify the least restrictive option that provides adequate support while preserving the student's rights and dignity. For example, a student might use informal supports for choosing electives, formal supports for post-graduation planning, and never need more restrictive options for their educational program.

Decision-Making Supports

Presume independence and provide additional support only as needed.

LEAST RESTRICTIVE

1. Independent Decision-Making

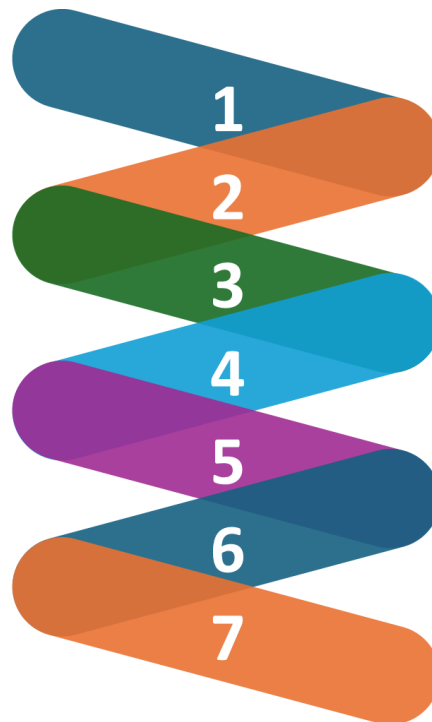
What it is: Student makes all decisions independently.
Example: Maria, who has a learning disability, reviews her IEP with her teacher beforehand, then leads her own IEP meeting at age 18.
When to use: When student can understand information and communicate choices.

2. Informal Supported Decision-Making

What it is: Student gets help from trusted people but keeps all legal rights.
Example: Josh brings his sister to IEP meetings to help him understand options and ask questions.
When to use: When student benefits from having a trusted person explain things.

3. Formal Supported Decision-Making

What it is: Written agreement outlining how specific people will help.
Example: Aisha signs an agreement that her aunt will help her understand graduation requirements and college options.
When to use: When informal support isn't enough or consistency is needed.



MOST RESTRICTIVE

4. Surrogate Parent

What it is: Someone appointed to make only educational decisions.
Example: The district appoints Mr. Johnson to help make IEP decisions for Tyler, but Tyler still makes all other life choices.
When to use: When student cannot participate in educational decisions even with support.

5. Limited Power of Attorney

What it is: Student voluntarily gives someone specific decision-making powers.
Example: Emma grants her mom power to make educational decisions for one year while she focuses on mental health treatment.
When to use: When student recognizes temporary need for someone else to decide.

6. Limited Guardianship

What it is: Court gives guardian power over specific life areas only.
Example: Court appoints dad as guardian for medical decisions only; student keeps all other rights.
When to use: When less restrictive options do not provide needed protection.

7. Full Guardianship

What it is: Court removes most or all decision-making rights.
Example: Court appoints full guardian who makes all major life decisions.
When to use: Only when person cannot make any decisions safely, even with maximum support.



Less Restrictive Alternatives to Guardianship: Educational Decision-Making Guide

Making It Work: A Step-by-Step Approach

Step 1: Start Early (Middle School or Before)

Age 11-13:

- Let student choose electives.
- Practice explaining their disability and needs.
- Include student in IEP meetings for at least part of the time.

Age 14-15:

- Student helps develop IEP goals.
- Practice self-advocacy skills.
- Identify trusted supporters.

Age 16-17:

- Student leads parts of IEP meeting.
- Make decisions with natural consequences (class schedule, activities).
- Develop formal support plan if needed.

Example: “When my daughter was 14, we started having her order her own food at restaurants and explain her accommodations to servers. By 18, she confidently explained her needs to college disability services.”

Step 2: Assess What Support Your Student Really Needs

Ask these questions:

- What decisions can they make independently? (Start here!)
- Where do they need explanation or encouragement?
- What decisions truly need someone else to make?

Remember: A student who needs help understanding a class schedule may still be able to choose their lunch independently. Support should match the specific decision.

Step 3: Try Simple Solutions First

Before jumping to legal options:

- Use visual aids and plain language.
- Allow extra time for decisions.
- Break complex decisions into smaller parts.
- Practice with low-stakes choices.



Less Restrictive Alternatives to Guardianship: Educational Decision-Making Guide

Example: Before considering a surrogate parent, try having a trusted teacher attend IEP meetings solely as a supporter for the student (not fulfilling another IEP role). This gives the student two intentional supports: their parent and the trusted teacher.

Step 4: Create a Support Plan That Works

Include:

- Who will help with which decisions?
- How they will help (explain options, attend meetings, etc.)?
- When to review and adjust the plan?
- What are the student’s goals?

Sample Language for Informal Agreement:

“I, [Student], want [Supporter] to help me by:

- Coming to my IEP meetings.
- Helping me understand my choices.
- Reminding me of questions I wanted to ask.

I can change this anytime I want.”

Step 5: Monitor and Celebrate Progress

- Review every 3-6 months.
- Reduce support as student gains skills.
- Document what works.
- Celebrate independence milestones!

Common Concerns and Real Answers

“My child’s intellectual disability means they can’t make good decisions.”

Reality: People with intellectual disabilities make decisions every day. Start with simple choices and build skills. A student who can choose between pizza and hamburger can learn to choose between classes with support.

“What if they make a bad decision?”

Reality: Everyone makes imperfect decisions and learns from them. Supported decision-making includes helping students understand consequences and learn from mistakes safely.

“My child doesn’t speak. How can they make decisions?”

Reality: Communication happens many ways: pointing, eye gaze, behavior, assistive technology, or choosing between objects. If your child shows preferences, they’re communicating decisions.

“The school says I need guardianship to stay involved with my child’s IEP.”

Reality: This is incorrect. IDEA recognizes supported decision-making. Schools must work with students



Less Restrictive Alternatives to Guardianship: Educational Decision-Making Guide

and their chosen supporters when supported decision-making enables the student to provide informed consent.

“What happens at age 18 if we do nothing?”

Reality: Your child automatically gains all adult rights at 18, including educational decision-making. Without preparation, this sudden change can be overwhelming. That’s why starting early matters.

Implementation Checklist for School Districts

Policy Level:

- Develop clear policies recognizing supported decision-making.
- Create or review procedures for appointing surrogate parents.
- Establish monitoring systems for less restrictive alternatives.
- Include supported decision-making in documents provided to parents.

School Level:

- Integrate decision-making skills into curriculum starting in elementary.
- Ensure that alternatives to guardianship are included in professional development opportunities.
- Create IEP meeting environments that support student participation.
- Develop peer mentorship programs for self-advocacy.

Student Level:

- Include decision-making goals in IEPs by age 14.
- Assess individual support needs annually.
- Document which supports work best for each student.
- Practice with progressively complex decisions.

Family Level:

- Provide information about alternatives at transition planning meetings.
- Connect families with local advocacy organizations.
- Offer supported decision-making workshops.
- Share success stories from other families.

Training Requirements:

- Ensure all special education staff are trained on supported decision-making.
- Ensure general education staff receive awareness training.
- Train administrators so they understand legal requirements.
- Provide annual refresher training for all staff.



Less Restrictive Alternatives to Guardianship: Educational Decision-Making Guide

Signs More Support May Be Needed

Consider more formal supports if:

- Student cannot understand consequences even with extensive explanation.
- Student's decisions consistently put them in danger.
- Student cannot communicate any preferences.
- Less restrictive options have been tried for 6+ months without progress.

Important: Even in these situations, start with the least restrictive option that provides adequate protection.

Cultural Considerations

Different cultures view disability and independence differently. Supported decision-making can honor your family's values while respecting your student's growing autonomy. Work with your team to find culturally responsive solutions that work for your family.

Possible Next Steps for Families

Start Small:

- Identify one decision your student can practice making today (what to wear, what to eat, which activity to do first)
- Notice and celebrate when your student makes choices throughout the day
- Ask your student their opinion about everyday decisions

Build Understanding:

- Review this guide with your family
- Talk to your student about their preferences for who helps them
- Learn about your student's communication style and preferences
- Share this guide with extended family and friends who support your student

Connect with Your School Team:

- Bring this guide to your next IEP or school meeting
- Ask about including decision-making goals in the IEP
- Request training on supported decision-making from your district
- Discuss which supports might work best for your student

Explore Resources:

- Join a parent support group in your area
- Learn about self-advocacy programs for your student
- Research person-centered planning options



Less Restrictive Alternatives to Guardianship: Educational Decision-Making Guide

Document and Plan:

- Start keeping notes about what decisions your student makes well
- Write down which supports work best
- Create a simple visual showing your student's support preferences
- Begin thinking about supporters your student trusts

Practice and Build Skills:

- Use visual aids to help explain choices
- Give your student extra time to make decisions
- Practice with low-stakes decisions before moving to bigger ones
- Role-play upcoming decisions or meetings

Advocate and Share:

- Share success stories with other families
- Ask your district about their supported decision-making policies
- Connect with Oregon's disability advocacy organizations
- Help other families learn about these options

Remember:

- Every student has the right to make choices
- Support, not substitution, should be the goal
- Start where your student is and build from there
- You don't have to figure this out alone - help is available

Conclusion

Supporting students to make their own decisions is not just about legal compliance. It is about dignity, respect, and preparing them for the fullest life possible. By starting early and using these less restrictive alternatives, we can help all students develop the skills and confidence to direct their own lives.

The path to independence is different for every student. Some will need minimal support, while others will need significant help throughout their lives. What matters is that we presume competence, provide appropriate support, and protect rights whenever possible.

Together, we can ensure every student has the support they need to make their own choices and live their fullest life.



Surrogate Parent Appointment for Students Lacking Capacity to Provide Informed Consent

DISCLAIMER: This document is intended solely for informational purposes. It's use is not mandatory, and school districts are encouraged to seek legal counsel to ensure compliance with state and federal law.

Purpose and Overview of the Document

This document aims to provide guidance for school districts and programs in Oregon regarding the transfer of educational rights at the age of majority for disabled adult students and adult students experiencing disability who may lack the capacity to provide informed consent regarding their education. It is intended to clarify the responsibilities of districts under federal and state law, and to offer best practices for ensuring that these students continue to have their educational interests represented. This guidance does not constitute legal advice and should not be considered definitive or legally binding. School districts are encouraged to consult with legal counsel to fully understand their obligations under the law.

Introduction

When students reach the age of majority (18 years old in Oregon), all rights accorded to parents under the Individuals with Disabilities Education Act (IDEA) transfer to the student, unless they have had another adult appointed to make educational decisions through a protective proceeding as described in ORS Chapter 125. However, some disabled students and students experiencing disability may reach the age of majority without the capacity to provide informed consent regarding their educational program but will not have gone through the necessary processes for guardianship or a lesser restrictive alternative to guardianship to be in effect. This guidance outlines the procedures that the Oregon Department of Education (ODE) suggests districts follow in such cases to ensure that these students continue to have their educational interests represented.

Legal Framework: Federal and State Requirements

Under 34 CFR § 300.520(b) and 20 U.S.C. § 1415(m)(2), states are required to establish procedures for appointing a representative for a student who has reached the age of majority but is unable to provide informed consent. Oregon Administrative Rules (OAR) 581-015-2320 and OAR 581-015-2325 address the procedures for appointing surrogate parents and the transfer of rights at the age of majority.

These rules establish a framework for appointing surrogate parents when necessary while promoting student autonomy and self-determination through supported decision-making practices.

Key Principles

The rules and this guidance are premised on several key principles:



Surrogate Parent Appointment for Students Lacking Capacity to Provide Informed Consent

- **Presumption of Competence:** All students, regardless of disability, should be presumed capable of making their own decisions unless determined otherwise based on available data and information about the student and their circumstances.
- **Self-Determination:** Every student has the right to direct their own life and make choices that impact their future. Self-determination involves having the attitudes, abilities, and opportunities to be the primary causal agent in one's life. Educational teams should recognize that developing self-determination skills is essential for all students and is associated with improved post-school outcomes. Supporting self-determination means honoring students' voices and choices while providing opportunities for them to practice making decisions about their education and future.
- **Supported Decision-Making:** Before appointing a surrogate, efforts should be made to support students in making their own decisions through appropriate accommodations and supports. Students can start practicing supported decision-making well before the age of majority, when rights will transfer. Over time, many students who may otherwise require a surrogate can learn to make supported decisions and provide their own informed consent to their educational program.
- **Dignity of Risk:** All students have the right to take reasonable risks, make mistakes, and learn from those experiences. Overprotection can inhibit growth and development. Educational teams should recognize that the opportunity to make choices—even imperfect ones—is essential for developing decision-making skills and self-determination. This principle acknowledges that avoiding all risk can be more harmful than allowing students to experience natural consequences within appropriate boundaries.
- **Student-Centered Approach:** Student preferences, interests, needs, and strengths must be central to all decision-making processes.
- **Least Restrictive Support:** Educational decision-making support should be provided in the least restrictive manner possible. If supported decision-making enables a student to provide informed consent to their educational program, a surrogate is not required. When a surrogate is required, that person should still use principles of supported decision-making to enable the student to make decisions to the maximum extent appropriate.

Determining Capacity to Make Educational Decisions

Before appointing a surrogate parent or other representative, it must be determined whether the student has the capacity to provide informed consent about their educational program. According to OAR 581-015-2325, this determination should be made by the Individualized Education Program (IEP) team, which should include input from the student, parents, educational professionals, recent evaluations, and any other relevant information.



Surrogate Parent Appointment for Students Lacking Capacity to Provide Informed Consent

The IEP team must consider whether the student:

1. Has a disability;
2. Is unable to provide informed consent regarding their educational program due to their disability; and
3. Is not already subject to a court order designating another person to make educational decisions.

In considering whether a student has the capacity to provide informed consent, the IEP team shall, at minimum, consider whether the student:

- Has any condition or circumstance that significantly interferes with their understanding of, and ability to participate meaningfully in, the IEP process, even with the use of supplementary aids and services; or
- Experiences any significant limitations in communicating their educational concerns, or expressing their preferences, interests, needs, or strengths regarding their IEP in a way that interferes with their ability to participate meaningfully in the IEP process, even with the use of supplementary aids and services.

Additional key considerations include:

- **Understanding Educational Information:** The student's ability to understand the nature and consequences of educational decisions, recognize their own educational strengths and needs, comprehend available options, and retain information for sufficient time to make decisions.
- **Communication of Decisions:** The student's ability to communicate decisions consistently across time and settings, express preferences, explain reasoning behind choices, and ask questions when needed, either verbally or through other means.
- **Evaluation of Options:** The student's ability to consider benefits and drawbacks of different options, relate decisions to personal goals, identify potential consequences, and adjust decisions when presented with new information.
- **Real-World Application:** Evidence of the student's decision-making in daily activities, application of learning from past experiences, ability to identify when help is needed, and advocacy for personal needs.
- **Age-appropriate transition assessment information** about the student's preferences, interests, needs, and strengths.

The [Determining Adult Student Capacity for Educational Decision-Making Sample Form](#) provides a structured approach to evaluating these considerations and should be used to guide the IEP team's determination.

Important notes:



Surrogate Parent Appointment for Students Lacking Capacity to Provide Informed Consent

- This determination can be made during any IEP meeting for the adult student. A separate meeting is not required unless requested by an IEP team member.
- Before determining that a student lacks capacity, the team should document all supplementary aids and services that have been provided to support the student's participation in educational decision-making and their effectiveness.
- The determination should not be based solely on any individual data point (including disability classification), but on the student's actual demonstrated capacity to make informed educational decisions.
- All determinations should be thoroughly documented with specific evidence supporting the team's conclusion, including direct observations of the student's decision-making in authentic contexts whenever possible.

Appointing a Surrogate Parent

If the IEP team determines that the student is not able to provide informed consent with respect to their educational program and they have not had another adult appointed to make educational decisions through a protective proceeding as described in ORS Chapter 125, the school district must appoint a surrogate parent or another appropriate individual to represent the student's educational interests. The parent is to serve as the surrogate unless they are unavailable, unwilling, or unable to serve in this capacity.

Eligibility to Serve as a Surrogate Parent

The surrogate parent must have knowledge and skills that ensure adequate representation of the student's educational interests. Under OAR 581-015-2320, the school district must ensure that each person approved to serve as a surrogate:

- Is not an employee of the school district or the ODE or any other agency that is involved in the education or care of the student,
- Is free of any personal or professional interest that conflicts with representing the student's special education interests, and
- Has knowledge and skills that ensure adequate representation of the student in special education decisions.

Selection Process

In considering whether an adult is suitable to serve as surrogate parent, the school district must consider all of the following:

1. **Student Preferences:** Any indication of the adult student's preferences about who might serve as a surrogate.



Surrogate Parent Appointment for Students Lacking Capacity to Provide Informed Consent

2. **Parent Input:** If the parent is not appointed as the surrogate, any input from the parent about who might serve.
3. **Existing Relationships:** Whether the student has:
 - A pre-existing relationship with the proposed surrogate,
 - A history of positive interactions with the proposed surrogate, and
 - A demonstrated comfort in the presence of the proposed surrogate.
4. **Surrogate Qualifications:** Whether the other adult has:
 - Demonstrated an understanding of the responsibilities of a surrogate parent,
 - Demonstrated an understanding of and the willingness to apply the principles of supported decision-making for the benefit of the adult student, and
 - Demonstrated the capacity to reliably act to the benefit of the adult student.
5. **Disqualifying Factors:** Any factors listed in ORS 343.156, which prohibits individuals who have lost custody of a child through child welfare proceedings due to safety concerns, or who have had their parental rights terminated, from serving as educational surrogates for that child.

The district should give priority to appointing the student's parent as the surrogate parent unless they are unavailable, unwilling, or unable to serve in this capacity. If the parent is not appointed, the district should document the reasons and identify another individual who can fulfill this role.

Responsibilities of the Surrogate Parent

According to OAR 581-015-2320(7), the duties of the surrogate parent are to:

- Protect the special education rights of the [adult] student;
- Be acquainted with the student's disability and special education needs;
- Represent the student in all matters relating to identification, evaluation, IEP, and educational placement; and
- Represent the student in all matters relating to the provision of a Free Appropriate Public Education (FAPE).

Review and Termination

The necessity of a surrogate parent must be reviewed at least every 365 days or when requested by the adult student or surrogate parent. This ensures that surrogate appointments do not continue unnecessarily when students develop capacity to make their own decisions.

Best Practices for Ensuring Representation of Student Interests

Early Planning

Begin discussions about the potential need for a surrogate parent or representative well before the student reaches the age of majority. This allows time for appropriate assessments and decision-



Surrogate Parent Appointment for Students Lacking Capacity to Provide Informed Consent

making. Families may not be prepared for the transition at 18 if the school does not begin planning for it early. Additionally, with early planning, many students will be able to learn to provide informed consent for their own educational program through earlier practice with decision-making.

Supported Decision-Making

Even when a surrogate is appointed, continue to use supported decision-making practices:

- Involve the student in all educational decisions to the maximum extent possible
- Use supported decision-making approaches to build student capacity
- Provide information in formats accessible to the student
- Allow adequate processing time for student input

Clear Communication

Clearly communicate with the student's family about the options available for representation and the process for appointing a surrogate parent. Early, repeated information through multiple channels can provide parents and families with the opportunity to make the best decisions for themselves.

Documentation

Maintain documentation of all decisions related to the determination of capacity and the appointment of a surrogate parent, including:

- Evidence considered in determining the student's capacity
- Supplementary aids and services provided to support student participation
- Student preferences regarding surrogate selection
- Rationale for surrogate selection decisions
- The consent of the appointed surrogate

Ongoing Review

Regularly review the student's situation to determine if the appointment of a surrogate parent continues to be necessary or if changes in the student's circumstances might affect their capacity to make informed decisions.

Important Note on Guardianship Alternatives

Families may have been told that full guardianship is the only option when they have concerns about their child's decision-making capacity. However, guardianship is just one option on a spectrum of supports, and might not be the least restrictive option. Schools should provide families with information about the full range of alternatives, including:



Surrogate Parent Appointment for Students Lacking Capacity to Provide Informed Consent

- **Supported Decision-Making Agreements:** Formal or informal arrangements where the student maintains their legal rights but receives support from trusted individuals to understand, make, and communicate decisions.
- **Surrogate Parent Appointment:** As outlined in OAR 581-015-2320, which applies specifically to educational decisions while preserving the student’s autonomy in other areas.
- **Limited Power of Attorney:** The student can designate specific powers to a trusted person while maintaining control in other areas of their life.
- **Limited Guardianship:** If needed, courts can establish guardianship for specific domains only (e.g., financial, healthcare) while preserving the student’s rights in other areas.

Early, thorough planning allows teams to identify the least restrictive options that provide appropriate support while maximizing the student’s autonomy and self-determination. This approach aligns with the “dignity of risk” principle, recognizing that the opportunity to make choices, learn from mistakes, and grow in decision-making ability is essential to human development.

Frequently Asked Questions

General Questions

Q: When do educational rights transfer to students?

A: In Oregon, educational rights transfer to all students when they turn 18 (the age of majority), unless a court has determined otherwise.

Q: Does having a disability automatically mean a student needs a surrogate?

A: No. All students, regardless of disability, should be presumed capable of making their own decisions unless determined otherwise through the IEP team. Most disabled students and students experiencing disabilities can make their own educational decisions, with or without support.

Q: What is the difference between guardianship and surrogate appointment?

A: Guardianship is a legal process through the court system that may remove many or all decision-making rights from an individual. A surrogate appointment is specific only to educational decisions, preserves the student’s rights in all other areas, does not require court involvement, and can be reversed as the student’s ability to provide informed consent develops.

Determining Capacity



Surrogate Parent Appointment for Students Lacking Capacity to Provide Informed Consent

Q: Who decides if a student can provide informed consent?

A: The IEP team (which includes the student, parents, and educators) makes this determination based on assessment data, observations, and input from all team members.

Q: If a student is determined to lack capacity now, is that permanent?

A: No. The determination must be reviewed at least annually and can be reviewed earlier at the request of a member of the IEP team. Many students develop decision-making capacity over time, especially with appropriate supports and practice.

Q: Does the IEP team need to hold a separate meeting just to determine capacity?

A: No. This determination can be made during any IEP meeting for the adult student. A separate meeting is not required unless requested by an IEP team member.

Appointing Surrogates

Q: Who can serve as a surrogate parent?

A: Priority is given to the student's parent unless they are unavailable, unwilling, or unable to serve. Otherwise, it could be another adult who has a positive relationship with the student, understands surrogate responsibilities, and can reliably act to benefit the student.

Q: Can school district employees serve as surrogate parents?

A: No. Under OAR 581-015-2320, district employees or employees of any agency involved in the education or care of the student cannot serve as surrogates.

Q: Does the student have any say in who becomes their surrogate?

A: Yes. The student's preferences about who might serve as surrogate must be considered in the selection process.

Implementation

Q: What documentation is required for surrogate parent appointments?

A: Districts should document the determination of capacity process, evidence considered, supports provided, student preferences for surrogate selection, rationale for selection decisions, and the consent of the appointed surrogate.

Q: If a student already has a court-appointed guardian, is a surrogate needed?

A: No. If a court has already appointed a guardian with authority over educational decisions, that



Surrogate Parent Appointment for Students Lacking Capacity to Provide Informed Consent

guardian has the legal authority to make educational decisions, and no surrogate appointment is needed.

Q: What should we do if a student challenges the determination that they lack capacity?

A: The student has the right to challenge this determination. If they do so, the IEP team should review the results of the determination in light of the student's request. Following the determination, the district should provide the student with written notice explaining the determination, the evidence supporting the decision, and the process for filing a state complaint to formally challenge the decision. The district should also take steps to ensure that the student understands all of this information in a manner consistent with the student's unique circumstances.

Supported Decision-Making

Q: What is supported decision-making?

A: Supported decision-making is an approach where disabled individuals and individuals experiencing disabilities maintain their decision-making authority but receive support from trusted people to understand, make, and communicate choices. This support can include explaining options in accessible language, helping weigh advantages and disadvantages, or assisting with communication.

Q: How can we implement supported decision-making before a student turns 18?

A: As early as possible, provide students with opportunities to practice making decisions about their education, involve them meaningfully in IEP meetings, teach decision-making skills explicitly, and gradually increase decision-making responsibilities as appropriate. Often, transition aged students may have measurable annual IEP goals related to development of decision-making skills.

Q: Does supported decision-making have to be a formal arrangement?

A: No. While formal supported decision-making agreements exist in some states, effective supported decision-making can happen informally through established relationships with trusted individuals who help the student understand and communicate decisions. However, a formal supported decision-making agreement can always be developed.

Q: If a surrogate is appointed, does the student still participate in decisions?

A: Yes. Even when a surrogate is appointed, the student should continue to be involved in all educational decisions to the maximum extent possible. The surrogate should use supported decision-making approaches to build the student's capacity and honor their preferences.

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Determining Adult Student Capacity for Educational Decision-Making Sample Form

Student: _____ Date: _____
Student D.O.B.: _____ Parent(s) Name(s): _____
District: _____ School: _____

DISCLAIMER: This document is intended solely for informational purposes. It's use is not mandatory, and school districts are encouraged to seek legal counsel to ensure compliance with state and federal law.

IMPORTANT: All adult students are presumed capable of making educational decisions. This form should only be used when there are significant concerns about capacity, and only after providing robust supports. The determination of incapacity requires clear evidence that the adult student cannot provide informed consent even with maximum supports.

BACKGROUND INFORMATION

Primary Disability Category: _____
Secondary Disability (if applicable): _____
Date Rights Transferred to Student: _____
Student's Preferred Communication Method: _____
Student's Primary Language: _____

PROCEDURAL SAFEGUARDS

- Student received notice of the meeting in which this will be completed in accessible format
Student was informed of their right to disagree with determination
Student was informed of appeal/complaint procedures
Copy of Procedural Safeguards provided and explained
Student's preferred supporters were invited to participate

SUPPLEMENTARY AIDS AND SERVICES

Check all that have been tried and document effectiveness:

Table with 3 columns: Communication Supports, Decision-Making Supports, Environmental Supports. Each column contains a list of support options with checkboxes.

Effectiveness

Empty rectangular box for effectiveness notes.

Other Supports Provided:

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Determining Adult Student Capacity for Educational Decision-Making Sample Form

Student: _____ Date: _____
Student D.O.B.: _____ Parent(s) Name(s): _____
District: _____ School: _____

Support	Date(s) Implemented	Effectiveness	Notes

SUPPORTED DECISION-MAKING EFFORTS

Before determining incapacity, document all attempts at supported decision-making:

How does the student prefer to receive information? (Check all that apply)

- Verbal explanation
- Written materials
- Visual/graphic
- Demonstration
- Discussion with trusted person
- Other: _____

Who has the student identified as trusted supporters?

What decision-making strategies work best for this student?

What environmental factors support their decision-making?

Describe specific supported decision-making strategies attempted:

STUDENT PARTICIPATION AND PERSPECTIVE

How was the student involved in this determination process?

What are the student's identified educational goals?

Who does the student want to help with decisions?

What concerns does the student have about this process?

Student's own view of their decision-making abilities:

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Determining Adult Student Capacity for Educational Decision-Making Sample Form

Student: _____ Date: _____
 Student D.O.B.: _____ Parent(s) Name(s): _____
 District: _____ School: _____

DETERMINING CAPACITY

Rating Scale:

- 4: Full Capacity** - Student consistently demonstrates ability (with or without supports)
- 3: Emerging Capacity** - Student demonstrates ability inconsistently but shows progress with supports
- 2: Significant Support Needed** - Student requires extensive support but can participate in some aspects of the area being considered
- 1: Unable to Demonstrate** - Student cannot demonstrate this skill even with maximum supports

Understanding Educational Information

Area	Rating	Evidence/Examples	Supports That Helped
Understands the purpose of an IEP: Can the student explain why they have an IEP?			
Recognizes their own educational strengths and needs: Can they identify what they're good at and what's hard?			
Comprehends educational options available: Do they understand different class/service options?			
Understands implications of educational decisions: Can they explain how choices affect their future?			
Retains information long enough to make decisions: Can they remember options discussed earlier?			

Communication of Educational Preferences and Decisions

Area	Rating	Evidence/Examples	Supports That Helped
Expresses preferences regarding educational program: Can they say what they want/don't want?			
Communicates choices consistently: Do they share choices they've made over time?			
Can explain reasoning behind choices: Can they tell you why they want something?			
Communicates agreement or disagreement: Can they communicate yes or no to proposals?			

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Determining Adult Student Capacity for Educational Decision-Making Sample Form

Student: _____ Date: _____
 Student D.O.B.: _____ Parent(s) Name(s): _____
 District: _____ School: _____

Area	Rating	Evidence/Examples	Supports That Helped
Asks questions or requests clarification: Do they seek help understanding things?			

Evaluation of Options

Area	Rating	Evidence/Examples	Supports That Helped
Considers advantages and disadvantages of options: Can they identify good and bad parts of choices?			
Relates decisions to personal goals: Do choices connect to what they want in life?			
Identifies potential consequences: Can they predict what might happen?			
Considers input while maintaining autonomy: Can they listen to advice but make own choice?			
Adjusts decisions with new information: Can they change their mind when it makes sense?			

Real-World Application

Area	Rating	Evidence/Examples	Supports That Helped
Makes consistent decisions in daily life: Do they make choices in other areas of life?			
Applies past experiences to decisions: Do they learn from what happened before?			
Identifies when help is needed: Do they know when to ask for support?			
Advocates for personal needs: Can they speak up for what they need?			
Shows awareness of safety: Do their choices consider safety?			

Relevant Formal Educational Assessment Results:

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Determining Adult Student Capacity for Educational Decision-Making Sample Form

Student: _____ Date: _____
Student D.O.B.: _____ Parent(s) Name(s): _____
District: _____ School: _____

[Empty text box]

Relevant Medical Information:

[Empty text box]

Observations of Real-World Functioning:

[Empty text box]

Input from Family/Caregivers:

[Empty text box]

IEP TEAM DETERMINATION

If the IEP team finds either of the following to be true, a surrogate may be needed:

- [] The student has a condition or circumstance that significantly interferes with understanding and meaningful participation in the IEP process, even with supplementary aids and services.
- [] The student experiences significant limitations in communicating educational concerns or expressing preferences/needs that interfere with meaningful participation, even with supplementary aids and services.

If either or both boxes are checked, provide detailed justification:

[Empty text box]

IEP Team Determination

Based on the information above, the IEP team has determined that:

- [] The student HAS capacity to provide informed consent regarding their educational program (may benefit from continued supports as described).
- [] The student DOES NOT have capacity to provide informed consent regarding their educational program, even with provision of supplementary aids and services.

SURROGATE DETERMINATION (Complete only if student determined to need surrogate)

Student's expressed preference regarding potential surrogate:

[Empty text box]

Parent input regarding potential surrogate (if parent not selected):

[Empty text box]

CONSIDERATION OF FACTORS PER OAR 581-015-2325(2)(C):

- [] Student's preference considered
- [] Parent input considered (if applicable)

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Determining Adult Student Capacity for Educational Decision-Making Sample Form

Student: _____ Date: _____
Student D.O.B.: _____ Parent(s) Name(s): _____
District: _____ School: _____

- Pre-existing positive relationship exists
- Proposed surrogate understands responsibilities
- Proposed surrogate understands supported decision-making
- No disqualifying factors present

Name of surrogate to be appointed: _____

Contact information: _____

Relationship to student: _____

Note: Once a person is named here, districts must follow their policies and procedures for appointment of that individual as a surrogate.

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Determining Adult Student Capacity for Educational Decision-Making Sample Form

Student: _____ Date: _____
 Student D.O.B.: _____ Parent(s) Name(s): _____
 District: _____ School: _____

REVIEW AND PROGRESS MONITORING

This determination will be reviewed no later than: _____ (date within 365 days)

The determination may be reviewed earlier upon request of the student or surrogate parent.

How will the IEP team work to increase student’s decision-making capacity?

--

SIGNATURES

Role	Name (Print)	Signature	Date
Student			
Parent/Guardian			
Special Education Teacher			
General Education Teacher			
District Representative			
School			
Psychologist/Evaluator			
Related Service Provider			
Other: _____			

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Determining Adult Student Capacity for Educational Decision-Making Sample Form

Student: _____ Date: _____
Student D.O.B.: _____ Parent(s) Name(s): _____
District: _____ School: _____

STUDENT-FRIENDLY SUMMARY PAGE

(To be completed and provided to student in accessible format)

What happened today:

We met to talk about how you make decisions about your education.

What we decided:

- ☐ You can make your own educational decisions. We will help you when you need it.
☐ You need someone to help you make educational decisions. The person who will help is: _____

Your rights:

- You can disagree with this decision
• You can ask for another meeting
• You can file a complaint
• You will get a copy of your rights

Next steps:

Empty rectangular box for next steps.

Questions? Contact: _____ Phone: _____

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Determining Adult Student Capacity for Educational Decision-Making Sample Form

Student:	_____	Date:	_____
Student D.O.B.:	_____	Parent(s) Name(s):	_____
District:	_____	School:	_____

Directions to Education Agency – Determining Adult Student Capacity for Educational Decision-Making Authority

This form is intended to support education agencies in complying with the requirements of the Individuals with Disabilities Education Act (IDEA) 2004 regulations related to transfer of rights at age of majority per 34 CFR § 300.520, as well as OAR 581-015-2320 (Surrogate Parents) and OAR 581-015-2325 (Transfer of Procedural Rights at Age of Majority). Its use is not required. Education agencies can choose to develop their own forms and procedures that comply with the requirements of federal and state authorities. Education agencies should consult with legal counsel regarding the applicable requirements of federal and state regulations. Remember that the goal is always to maximize student autonomy and self-determination while ensuring access to appropriate educational services.

Purpose

Use this form to document the IEP team’s determination of whether an adult student has the capacity to provide informed consent regarding their educational program. This process must be conducted with respect to the principles of self-determination, presuming competence, and the dignity of risk.

Key Principles

Presuming Competence

- All adult students are presumed capable of making educational decisions
- The burden is on the IEP team to demonstrate clear evidence of incapacity
- Incapacity is not determined by disability category or label
- Communication differences do not equal incapacity

Self-Determination

- Students have the right to make their own choices, even if others disagree
- The goal is to maximize student autonomy and decision-making while ensuring that informed consent is provided for their educational program
- Supported decision-making must be explored before determining incapacity

Dignity of Risk

- Students have the right to make decisions that others might view as risky or unwise
- Poor decisions or disagreement with recommendations does not indicate incapacity
- Learning from mistakes is part of self-determination
- Safety concerns alone do not justify removing decision-making rights

When Is This Form Used?

Use this form **ONLY** when:

1. A student has reached age of majority (18) or been emancipated
2. There are significant, documented concerns about the student’s capacity to provide informed consent
3. The IEP team has already attempted multiple supports and accommodations
4. The team is considering whether a surrogate parent is necessary

[Agency Logo]

Determining Adult Student Capacity for Educational Decision-Making Sample Form

Student: _____ Date: _____
Student D.O.B.: _____ Parent(s) Name(s): _____
District: _____ School: _____

Do NOT use this form:

- Simply because an IEP team member requests it without evidence of incapacity
- Because the student is non-compliant or makes choices the team disagrees with
- As a routine practice for students eligible under certain disability categories or in specific programs
- Before attempting robust supported decision-making strategies

Completing the Form

Before the Meeting:

1. Ensure the student has been notified in an accessible format
2. Invite the student’s chosen supporters to participate
3. Gather relevant assessment data and observations
4. Plan for necessary accommodations and supports during the meeting

During the Determination Process:

1. **Background Information:** Complete all fields. Ensure communication methods reflect the student’s preferences.
2. **Procedural Safeguards:** Check each box as completed.
3. **Supplementary Aids and Services:**
 - Document ALL supports attempted, not just those currently in use
 - When an attempted aid or service does not provide all support a student needs, it is still important to note partial success
4. **Supported Decision-Making Efforts:**
 - This section is critical – supported decision-making is to be used instead of a surrogate where it enables the student to provide informed consent
 - Include specific examples of strategies attempted
 - Document the student’s own preferences for support
5. **Student Participation and Perspective:**
 - The student **MUST** be present unless there are extraordinary circumstances
 - Use the student’s actual words when possible
 - If using alternative forms of communication or input, document how the student’s participation and perspective were collected
6. **Determining Capacity:**
 - Use evidence-based examples, not general impressions
 - “Unable to Demonstrate” should be used rarely and only with extensive documentation
7. **IEP Team Determination:**
 - Criteria established by OAR must be met to determine incapacity
 - The justification must be specific and detailed
 - Avoid vague language like “cognitive limitations” without specific examples
8. **Surrogate Determination** (if applicable):
 - Student preference is paramount

[Agency Logo]

Determining Adult Student Capacity for Educational Decision-Making Sample Form

Student:	_____	Date:	_____
Student D.O.B.:	_____	Parent(s) Name(s):	_____
District:	_____	School:	_____

- Document all considerations per OAR requirements
- Ensure proposed surrogate understands and will use supported decision-making

After the Meeting:

1. Provide the student with the student-friendly summary immediately
2. Ensure all team members sign
3. Schedule the review date (must be within 365 days)
4. File according to district special education records requirements

Important Considerations

Communication Access

- Use the student’s preferred communication method throughout
- Allow extra time for processing and response
- Confirm the adult student’s understanding
- Document all communication supports provided

Avoiding Common Errors

- Do not conflate communication differences with lack of capacity
- Do not assume incapacity based on IQ scores or adaptive behavior scores alone
- Do not determine incapacity because the student’s choices seem unwise
- Do not rush the determination - multiple sessions may be needed

Reminders

- The IEP team’s determination that an adult student cannot provide informed consent for their educational program does NOT necessarily affect the student’s capacity in other areas (e.g., voting, medical decisions, contracts) and the IEP team is encouraged to make its decision based solely on educational factors
- This determination is intended **ONLY** for special education decision-making
- The determination must be reviewed at least annually
- Students can request review at any time



Transitioning to Adulthood: Transfer of Rights at the Age of Majority

DISCLAIMER: This document is intended solely for informational purposes. It's use is not mandatory, and school districts are encouraged to seek legal counsel to ensure compliance with state and federal law.

Introduction

The transition to adulthood is a significant milestone for all students, including disabled students and students experiencing disability. In Oregon, when students reach the age of 18, the rights that were previously held by their parents under the Individuals with Disabilities Education Act (IDEA) transfer to the students themselves. This means that the student will assume control over decisions related to their education, including their Individualized Education Program (IEP), unless they have had another adult appointed to make educational decisions through a protective proceeding as described in ORS Chapter 125.

This transition represents more than just a legal change—it's an opportunity to honor students' growing autonomy and self-determination. Schools should approach this process with a presumption of student competence and a commitment to providing appropriate support for decision-making rather than limiting student authority. This guidance provides an overview of the legal requirements and best practices for managing this important transition.

Legal Framework: Federal and State Requirements

Under IDEA and Oregon law, specific federal and state requirements apply to disabled students and students experiencing disabilities reaching the age of majority:

- **Federal and State Requirements:** The transfer of rights is governed by 34 CFR § 300.520 and Oregon Administrative Rules (OAR 581-015-2320 through OAR 581-015-2330), which outline the procedures for notification and the conditions under which rights may not transfer.
- **Transfer of Rights:** All educational rights previously held by the parents transfer to the student, including the right to participate in IEP meetings, consent to evaluations, and make decisions regarding educational placement and services.
- **Notification Requirements:** The school district must inform both the student and the parents of the transfer of rights at least one year before the student reaches the age of majority. This notification should include information about what rights will be transferred and what responsibilities the student will assume.

Preparing Students and Families for the Transfer of Rights



Transitioning to Adulthood:

Transfer of Rights at the Age of Majority

Effective preparation is key to a successful transition of rights at the age of majority. School districts should work with students and families well in advance of the student's 18th birthday to ensure they understand the implications of the transfer.

Building Self-Determination Skills

Self-determination—the ability to direct one's own life and make informed choices—is essential for all students. Schools should:

- Explicitly teach and provide opportunities to practice self-advocacy, informed decision-making, understanding rights and responsibilities, and effective communication.
- Honor student voices and choices throughout their educational experience.
- Recognize that developing self-determination skills is associated with improved post-school outcomes.

Early Planning

- Begin discussions about the transfer of rights when students are 14-15 years old, as part of transition planning.
- Provide several years for students to practice decision-making skills and gradually assume more responsibility.
- Recognize that with early planning, many students will develop the skills needed to exercise their rights effectively.

Family Preparation

- Help families understand how their role will shift from decision-maker to advisor and supporter.
- Provide resources on supported decision-making and how families can effectively support their young adult's autonomy.
- Discuss the dignity of risk—acknowledging that making mistakes and learning from them is an important part of development.

Practice Opportunities

- Create structured opportunities for students to practice making educational decisions before they turn 18.
- Gradually increase student responsibility and leadership in the IEP process.
- Use supported decision-making approaches to build student capacity.

Steps for Implementing the Transfer of Rights

As a disabled student or student experiencing disability approaches the age of majority, the following steps should be taken:



Transitioning to Adulthood: Transfer of Rights at the Age of Majority

1. **Formal Notification:** Provide written notice to both the student and the parents at least one year before the student turns 18. This notice should clearly outline which rights will transfer to the student and include resources for further information.
2. **Review of Rights and Responsibilities:** In an IEP meeting with the student and their family, review the rights that will be transferred and discuss the student's responsibilities. Where appropriate, this meeting should include a discussion of supported decision-making options and any concerns about the student's capacity to make informed decisions.
3. **Assessment of Need for Support:** Determine what level of support, if any, the student might need to exercise their rights effectively. For most students, supported decision-making will be sufficient, but some students may require more structured support.
4. **Document the Transfer:** On the student's 18th birthday, document the transfer of rights in the student's IEP and ensure that the student receives a copy of all relevant documents. Include specific information about any support mechanisms that have been agreed upon.
5. **Ongoing Support:** Provide ongoing support to the student as they begin to exercise their new rights. This might include additional training in self-advocacy, decision-making, and understanding their educational program.

Addressing Special Circumstances (Including Lack of Capacity to Provide Informed Consent)

While most students will assume their rights at the age of majority, there are special circumstances where additional steps may be necessary:

- **Students Needing Decision-Making Support:** If a student may need support in exercising their rights, the IEP team should discuss supported decision-making options. This could include identifying trusted adults who can help explain information, explore options, and support communication.
- **Students Lacking Capacity:** If a student is determined to be unable to provide informed consent regarding their educational program, the IEP team may need to appoint a surrogate parent or representative. This process is covered in detail in the companion guidance document [“Surrogate Parent Appointment for Students Lacking Capacity to Provide Informed Consent.”](#)
- **Students Under Guardianship:** If a court has appointed a legal guardian for the student, the rights will transfer to the guardian rather than the student. The district should obtain and document the guardianship order.
- **Alternatives to Guardianship:** Schools should inform families about alternatives to guardianship, including supported decision-making agreements, educational surrogate appointment, limited power of attorney, and other less restrictive options that preserve student autonomy while providing appropriate support.

Frequently Asked Questions (FAQs)



Transitioning to Adulthood: Transfer of Rights at the Age of Majority

Q: When exactly do educational rights transfer to students?

A: In Oregon, educational rights transfer to all students when they turn 18 (the age of majority), unless otherwise established following a protective proceeding and court order in accordance with state law.

Q: What specific rights transfer to the student at age 18?

A: All educational rights previously held by parents transfer, including the right to:

- Receive notice of and attend IEP meetings
- Consent to reevaluations
- Request for mediation or due process hearings to resolve disputes
- Access educational records
- Make decisions about the student's educational program

Q: What notice must schools provide about the transfer of rights?

A: Schools must notify both the student and the parents about the upcoming transfer of rights at least one year before the student turns 18. This notice should clearly explain which rights will transfer and what this means for the student and family.

Q: Can parents still attend IEP meetings after the transfer of rights?

A: Yes, parents can still attend IEP meetings if invited by the student or the school district. However, the student is the primary decision-maker, and the parents' role is advisory unless the student chooses to delegate certain responsibilities to them, or a court has established guardianship.

Q: What if a student wants their parents to continue making decisions?

A: The student can choose to include their parents in decision-making in several ways:

1. Informally involving parents in discussions and considering their advice.
2. Signing a release allowing parents to access records and communicate with the school.
3. Creating a supported decision-making agreement that outlines the parents' role.
4. Executing a power of attorney for educational decisions.

Q: How can schools determine if a student needs support with decision-making?

A: Schools should observe and assess the student's decision-making in real contexts, provide opportunities to practice with support, and consider input from the student, family, and educators. The determination should focus on the student's understanding of options, ability to communicate preferences, and capacity to consider the consequences of choices.

Q: What should we do if we're concerned a student may lack the capacity to make educational decisions?

A: First, ensure the student has received appropriate accommodations and supports for decision-making. If concerns persist, refer to the [companion guidance document on ensuring educational rights](#)



Transitioning to Adulthood: Transfer of Rights at the Age of Majority

[are protected](#), which outlines the determination process and criteria for determining capacity for adult students who may lack capacity to provide informed consent for their educational program.

Q: What documentation is required for the transfer of rights?

A: Schools should document:

- The notice provided to the student and parents at least one year before the student's 18th birthday.
- Discussions about the transfer of rights in IEP meeting notes.
- The actual transfer of rights in the IEP developed closest to the student's 18th birthday.
- Any agreements regarding supported decision-making or other accommodations.

Q: How can schools support students in making informed decisions?

A: Schools can:

- Provide explicit instruction in decision-making and self-advocacy.
- Create opportunities to practice decision-making with increasing responsibility.
- Offer information in accessible formats.
- Allow adequate time for processing information.
- Involve trusted supporters chosen by the student.
- Teach students how to evaluate options and consider consequences.

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Summary

Meeting Date: 10/16/2025

Title: First Reading of Proposed Permanent Amendments to OAR 581-015-2320 (Surrogate Parents) and OAR 581-015-2325 (Transfer of Procedural Rights at Age of Majority)

Status: First Reading

Presentation: No (Written Report Only/Consent)

Key Staff: Ramonda Olaloye, Abby Wells

Topic Summary: First Reading for proposed permanent adoption of amendments to rules governing educational decision-making for disabled adult students and adult students experiencing disabilities. These amendments, currently in effect on a temporary basis, establish a clear, legally sound process for districts to follow when an adult student may lack the capacity to provide informed consent for their educational program. This rulemaking is necessary to close a long-standing procedural gap and ensure Oregon's compliance with the federal Individuals with Disabilities Education Act (IDEA) at 34 CFR § 300.520. The temporary rules were developed in partnership with Disability Rights Oregon, family advocates, and districts. Since their adoption in June, further engagement with partners has identified key areas for improvement. ODE is developing revisions based on this feedback to strengthen the rule for final adoption in December, including a less restrictive option for a "conditional surrogate appointment" for adult students experiencing disabilities and disabled adult students with fluctuating capacity. The permanent adoption will be supported by a comprehensive suite of ODE-developed implementation resources to ensure consistent and equitable application statewide.

ODE Education Equity

Stance

Education equity is the equitable implementation of policy, practices, procedures, and legislation that translates into resource allocation, education rigor, and opportunities for historically and currently marginalized youth, students, and families including civil rights protected classes. This means the restructuring and dismantling of systems and institutions that create the dichotomy of beneficiaries and the oppressed and marginalized.

BACKGROUND AND NEED

Members of the State Board of Education are volunteers, with unique professional and lived experiences. Using plain language, this section should provide context for this item, including any needed overviews of relevant programs or initiatives.

1. Briefly, how does this topic, program, or initiative currently operate? Where is it located within Oregon's school systems? How does it ultimately serve students?

OAR 581-015-2320 and OAR 581-015-2325 are foundational special education rules that are central to protecting student rights. The first rule establishes the process for appointing a surrogate parent for a child with a disability when a parent cannot be identified or located. The second implements the federal requirement that educational rights transfer from the parent to the student when they reach the age of 18.

Historically, a regulatory gap existed where these two rules intersect, creating procedural uncertainty for school districts when an adult student's rights had transferred, but they lacked the capacity to provide informed consent for their own educational program.

Following Board action in June 2025, these rules now operate under temporary amendments that close this gap. The temporary rules establish a clear, legally sound process for Individualized Education Program (IEP) teams to determine when an adult student experiencing disability or a disabled adult student needs a surrogate parent appointed to represent their

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educational interests. This establishes a critical safeguard to ensure these students continue to receive a Free Appropriate Public Education (FAPE) without service disruption as they transition to adulthood.

2. Please list the specific rule(s), statute(s), or recently passed legislation that allows the Board to take action on this item. Where are they prescriptive and where do they provide the Board and Department flexibility?

The State Board of Education's authority to adopt and amend these rules is established in Oregon Revised Statutes, including **ORS 343.041, 343.045, and 343.055**.

The specific impetus for this rulemaking is a federal mandate under the Individuals with Disabilities Education Act (IDEA).

- **Federal Requirement (The 'What')**: The federal regulation at **34 CFR § 300.520** is prescriptive. It mandates that Oregon "**must establish procedures**" for appointing an educational representative for a disabled adult student or an adult student experiencing disability who has not been found legally incompetent but is determined by the state to be unable to provide informed consent. Until the adoption of the temporary rules, Oregon's administrative rules did not contain this required procedure.
- **State Flexibility (The 'How')**: While the federal government requires that a procedure exist, it provides the Board and the Department with considerable discretion in **how** to design and implement it. This flexibility allows Oregon to establish its own specific processes for how an IEP team determines a student's capacity, what criteria are used to select an appropriate surrogate, and what safeguards must be in place to protect student rights.

3. Has this item come before the Board before? If so, when did the Board last take action, and what was that action?

Yes. This item came before the Board on June 12, 2025. At that time, the Board voted to approve the temporary adoption of amendments to OAR 581-015-2320 and OAR 581-015-2325 to immediately address the identified regulatory gap.

4. Why is this item coming before the Board now?

This item is coming before the Board for First Reading because the temporary rules adopted in June are set to expire on December 12, 2025. Permanent adoption is required to prevent the regulatory gap from reopening. A failure to adopt permanent rules would result in a return to procedural uncertainty for districts, create the potential for service disruptions for disabled students and students experiencing disabilities, and place the state out of compliance with federal law.

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Since the temporary adoption, ODE has conducted additional community engagement that has directly informed contemplated revisions to the rule language and the development of a comprehensive suite of implementation resources. This work will ensure permanent rules are applied effectively and equitably across the state.

5. Who requested or brought about the need for this item? (Select all that apply.)

- ODE Staff
- Students
- Families
- Community-Based Organizations
- Culturally Specific Organizations
- School Districts
- Education Service Districts
- Charter Schools
- Oregon State Legislature
- Educational Associations
- Racial Justice Council
- Federal Government
- One or more of Oregon's nine federally recognized tribes: _____
- Other: Disability Rights Oregon

ENGAGEMENT STRATEGY AND LEARNINGS

The State Board of Education expects all items that come before it be reviewed and influenced, to the greatest extent possible, by a robust community engagement process. Using plain language, this section should provide an overview of the role that engagement played in this item, including with Oregon's nine federally recognized Tribes, other state agencies, and external partners.

6. How did the [Equity Decision Tree](#) inform your office/team engagement strategy? Who is most likely to be affected and how have they been intentionally incorporated into the engagement process for this item?

Our engagement strategy was guided by ODE's Equity Decision Tree, which prompted us to first identify the populations most impacted by this rulemaking. Those most affected are disabled adult students and adult students experiencing disabilities who may lack capacity to provide informed consent, and their families. Our strategy, therefore, has been to intentionally center their voices and the perspectives of their advocates and educators throughout this multi-phased process.

- **Phase 1 (Temporary Rules):** To develop the initial rule language, we conducted targeted engagement with key partners to understand the issue from multiple perspectives. This included Disability Rights Oregon (rights-based perspective), FACT Oregon (family

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perspective), and Special Education Directors (implementation perspective), alongside a public survey. This initial phase was crucial for shaping the core student-centered protections in the temporary rule.

- **Phase 2 (Permanent Rules & Implementation):** Based on feedback from Phase 1 that a rule change alone was not enough, our recent engagement has focused on developing and refining a suite of practical implementation resources. The goal is to ensure the rule is applied consistently and equitably. We have sought broad feedback on these draft resources from the public via a survey, the State Advisory Council for Special Education (SACSE), and ODE’s Ongoing Rules Committee Advisory (ORCA).

7. After consulting with ODE’s Rules Coordinator and the Office of Indian Education, did this item require Tribal Consultation and/or Tribal Communication with Oregon’s nine federally recognized tribes? (For more information, please reference ODE’s [Tribal Consultation Toolkit](#).)

- No
- Yes – Both Consultation and Communication.
- Yes – Only Communication.

8. Has your office/team considered how this item intersects with the authority of other state entities that serve the health and education needs of Oregon’s students, or otherwise contribute to the climate of Oregon’s school systems? If so, please select from the below list.

- N/A; this item does not intersect with other state entities.
- Oregon Health Authority (OHA)
- Department of Early Learning and Care (DELIC; formerly ELD)
- Educator Advancement Council (EAC)
- Higher Education Coordinating Commission (HECC)
- Youth Development Oregon (YDO)
- Teacher Standards and Practices Commission (TSPC)
- Oregon Housing and Community Services (OHCS)
- Other: _____

If you selected any of the above entities, please share why they were involved, how the Department partnered with them, and what feedback they provided.

Not applicable.

9. Which geographic perspectives are intentionally represented in your office/team engagement strategy?

- Northeast Oregon
- Central and Southeast Oregon
- Southwest Oregon

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- Willamette Valley and Central Coast
- Northwest Oregon
- Tribal lands
- Other: _____

Why did your office/team focus on the above geographical perspective(s)?

Engagement was conducted statewide through a public survey and collaboration with organizations that have statewide representation.

10. Please highlight some of the key pieces of feedback your office/team received during the engagement process. How did this feedback influence the development of this item? How were differences in opinion accounted for?

Partner feedback has been central to this rulemaking process, which has allowed the rules to be refined through multiple phases based on what we learned. Key themes and ODE's responses include:

- **Theme 1: Centering Student Rights and Self-Determination**

What We Heard: In our initial engagement, family and disability advocates from organizations like FACT Oregon and Disability Rights Oregon emphasized the need to build the rule on a foundation of self-determination and the presumption of competence, with strong safeguards against potential bias.

How We Responded: This feedback fundamentally shaped the core of the temporary rules. In response, ODE shifted determination authority from the district to the full IEP team, mandated that Supported Decision-Making be considered first, required annual reviews of any surrogate appointment, and centered the entire process on student preferences.

- **Theme 2: Developing Field-Driven, Practical Revisions**

What We Heard: During the permanent rulemaking phase, partners identified key areas where the rule could be improved. Special Education Directors strongly recommended a more flexible, less restrictive option for adult students experiencing disabilities and disabled adult students with fluctuating capacity. Additionally, the State Advisory Council for Special Education (SACSE) identified a procedural gap regarding surrogate appointments made by the juvenile court.

How We Are Responding: This direct feedback is informing contemplated revisions for the final rule language that will be presented in December. ODE is currently developing

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a new provision for a “conditional surrogate appointment” and language to clarify district responsibilities for court-appointed surrogates to address the specific needs identified by our partners.

- **Theme 3: Addressing Practical Implementation Needs**

What We Heard: Throughout the process, district and ESD personnel highlighted the need for practical support. They noted implementation challenges, especially in finding qualified surrogates in rural areas, and expressed concerns about the time and resources required to implement the procedures with fidelity.

How We Are Responding: This feedback is the primary reason ODE has developed a comprehensive suite of implementation resources, including guidance documents, sample forms, and at-a-glance guides to reduce district burden. ODE acknowledges the valid concerns about resources and is committed to providing ongoing technical assistance and exploring further supports to help ensure the rule can be implemented equitably statewide.

11. Please describe any additional engagement opportunities your office/team will be pursuing prior to asking the Board to take action on this item.

To ensure the voices of students, families, educators, and advocates are fully incorporated into the final rule, ODE has launched a comprehensive public engagement campaign that will run until the final vote in December. A dedicated webpage is being finalized that will serve as a central hub for all information and participation opportunities.

Key engagement opportunities related to this permanent rule making include:

- **Public Surveys:** Two targeted online surveys are open to solicit specific feedback. The first survey, focused on the draft implementation resources, was available from September 9, 2025 through October 15, 2025. A second survey, focused specifically on the proposed rule language, opened today and will remain open until December 11, 2025.
- **Formal Public Hearing:** ODE will hold a formal public hearing on the proposed permanent rules on November 18, 2025, providing a dedicated forum for public testimony.
- **Written and Oral Testimony to the Board:** The public may submit written comments directly to the State Board at any time via email or mail and may provide public comment during the final Board meeting on December 11, 2025.

Commented [AW1]: I think that works, and that gives us until Thursday to get the website up.

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- **Final Partner Engagement:** ODE will also conduct a final presentation to the Ongoing Rules Committee Advisory (ORCA) in December prior to seeking final adoption from the Board.

Any changes made to the proposed rule language between this First Reading and the version brought to the Board for final adoption in December will be clearly documented for the Board's consideration at that time.

FISCAL AND ADMINISTRATIVE IMPACT ANALYSIS

Equitable resource allocation is a critical component of education equity. Using plain language, this section should describe the fiscal, administrative, and small business impacts of this item, and how it affects the larger social system that serves Oregon's students.

12. After consulting with ODE's Rules Coordinator and Grant Consolidation Team, was this item identified as a grant-related item?

- No
 Yes; please review Appendix B: Grant Consolidation below.

13. Will Board action create fiscal or administrative impacts on districts, ESDs, community-based organizations, and/or the nine federally recognized tribes? If so, please describe the anticipated short- and long-term effects and how they may be felt differently in small, rural, or remote communities.

The permanent adoption of these rules is anticipated to have a minimal, and potentially cost-saving, fiscal and administrative impact on school districts and Education Service Districts (ESDs).

- **Administrative Support and Potential Cost Savings:** While districts may need to update local policies and train individuals to serve as surrogate parents, ODE is mitigating this impact by developing a comprehensive suite of standardized guidance, sample forms, and training materials. By providing these resources, ODE reduces the administrative burden on districts to create them from scratch. Furthermore, by establishing clear, legally defensible procedures, the rules are expected to reduce the need for districts to seek costly, case-by-case legal consultation in these complex situations.
- **Impact on Small, Rural, or Remote Communities:** We acknowledge that small, rural, or remote communities may face greater challenges, particularly in recruiting qualified surrogate parents. This concern was highlighted in public engagement, with rural staff noting the strain of high caseloads and additional meeting requirements for already overloaded staff. To address this, ODE is committed to developing statewide training materials and exploring possibilities for virtual support to help connect surrogates with students in remote areas.

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No fiscal or administrative impacts are anticipated for community-based organizations or Oregon's nine federally recognized tribes.

14. Will Board action create a fiscal or administrative impact on state agencies, units of local government, and/or the public? Will it increase costs associated with compliance for small businesses?

There is no anticipated fiscal impact on the Oregon Department of Education as a result of this Board action. All work related to developing guidance, creating training materials, and providing ongoing technical assistance to districts will be absorbed by existing staff within the Office of Enhancing Student Opportunities.

There are no anticipated fiscal or administrative impacts on other units of local government, small businesses, or the public.

EQUITY IMPACT ANALYSIS

The State Board of Education envisions an aspirational education system that honors its increasingly diverse student body and affirms every student to reach their full potential in a rapidly shifting global environment. Using plain language, this section should describe the impact of this item on students and the larger social system that serves their health and education needs.

15. How will Board action on this item ultimately impact students and their families, particularly those who have been and continue to be systemically marginalized?

Permanent adoption will have a significant positive impact by creating an accessible, administrative pathway that allows families to secure decision-making support without navigating complex and often costly legal guardianship proceedings. This particularly benefits historically underserved communities that may face disproportionate barriers to legal services. Most importantly, the rules and the accompanying resources on Supported Decision-Making and Less Restrictive Alternatives are designed to actively challenge the historic presumption of incompetence. By mandating that the least restrictive options be considered first, this action promotes the self-determination and autonomy of disabled students and students experiencing disabilities, ensuring their preferences and strengths are at the center of all educational decisions.

16. How will Board action on this item ultimately impact school district employees and volunteers, particularly those who have been and continue to be systemically marginalized?

This Board action will provide school district employees with clear, standardized, and legally-sound procedures for situations they have long found ambiguous. This clarity reduces administrative burden and empowers staff by providing a defensible process to follow. By shifting the determination authority to the full IEP team, the rule promotes a collaborative model that leverages the collective expertise of all members and reduces the pressure on any

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single employee to make these critical determinations alone. A clear and fair process supports all staff, ensuring decisions are made consistently and equitably across the state.

17. What are the anticipated short- and long-term consequences of Board action on this item? Will Board action have a cumulative effect on students, families, educators, districts, or Oregon's school systems?

- **Short-Term:** Board action will provide immediate stability for school districts by making the procedural clarity and legal certainty established by the temporary rules permanent. This ensures there is no disruption or a return to procedural ambiguity when the temporary rules expire in December.
- **Long-Term:** The action will foster a more equitable and empowering educational system for disabled students and students experiencing disabilities. Cumulatively, it will shift practice across the state toward a culture that presumes competence and prioritizes student autonomy through Supported Decision-Making. For families, it will reduce the potential reliance on formal, costly, and restrictive legal guardianship proceedings to support their adult children's educational needs.

18. What are the anticipated short- and long-term consequences of inaction on this item and who would experience those consequences?

Inaction would cause the temporary rules to expire, reopening the regulatory gap this rulemaking was initiated to close. This would result in an immediate return to procedural uncertainty and legal risk for school districts, leading to inconsistent practices across the state and a failure to comply with federal IDEA requirements.

The most severe and direct consequences would be experienced by adult students experiencing disabilities and disabled adult students who may lack the capacity to provide informed consent, as they would face potential disruptions to their Free Appropriate Public Education (FAPE).

Furthermore, inaction would undermine the significant progress made to promote student agency and self-determination. These rules and the accompanying resources are designed to increase the use and effectiveness of Supported Decision-Making models across Oregon. A failure to make them permanent would be a setback for this important work, limiting the use of these less restrictive practices that empower students to build their own decision-making skills.

RECOMMENDED ACTION

The State Board of Education has dedicated itself to challenging the status quo and sharing responsibility for every student's academic and lifelong success. Using plain language, this section should describe the choice before the Board, the Department's recommendation, and any other relevant information.

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19. Please provide a brief summary of the specific language your office/team is bringing to the Board. Are there any key decisions within this language that your office/team would like the Board to make?

The language presented for this First Reading is the text of the temporary rules currently in effect. These foundational provisions establish a clear, IEP team-driven process for determining when a surrogate parent may be necessary for a disabled adult student or an adult student experiencing disability. Key protections in this baseline text include the mandate to consider Supported Decision-Making first – though ODE is contemplating ways by which the rules could strengthen that language for permanent adoption – the prioritization of parents for the surrogate role, and the requirement for an annual review.

Based on recent public engagement, ODE is developing revisions to this language which will be incorporated into the final version presented for adoption in December. These contemplated revisions include a provision for a “conditional surrogate appointment” and clarifications on procedures for court-appointed surrogates.

There are no key decisions for the Board to make at this time; this First Reading is for review and comment.

20. How is this language responsive to identified needs and/or feedback received through the engagement process? How is it in alignment with [the Board’s Mission, Vision, and Values](#)?

This rulemaking, from its inception to its contemplated final form, is a direct product of extensive community feedback designed to balance procedural clarity for districts with the protection of student rights. The foundational emphasis on team-based decisions, student preference, and Supported Decision-Making strongly aligns with the Board’s values of centering equity, sharing responsibility, and fostering self-agency for every student.

The contemplated revisions, such as the “conditional surrogate” provision, further enhance this alignment by creating even less restrictive, more student-centered options directly in response to what we heard from partners in the field.

21. Please describe the action your office/team is recommending to the Board (for example, the adoption of rules or the approval of a waiver) and how it reflects the Department’s commitment to academic excellence, belonging and wellness, and reimagining accountability.

ODE recommends the Board approve the proposed permanent amendments for First Reading. This recommendation reflects a thorough and responsive process that began with the temporary rule adoption in June. Since then, engagement has confirmed two key needs, which ODE has acted upon:

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1. The need for practical, user-friendly implementation supports.
2. The need for specific, field-driven improvements to the rule language itself.

Therefore, the item before the Board today has been substantially strengthened by the development of a comprehensive implementation package and the identification of key rule revisions to be finalized in December. The implementation package reflects our commitment to belonging and wellness by providing districts, educators, and families with the tools they need to succeed. The ongoing, responsive revisions to the rule itself reflect our commitment to reimagining accountability by ensuring our policies are shaped by and accountable to the communities we serve.

To support the Board's review of this item, ODE has attached several additional explanatory documents to this State Board Docket:

- **Attachment A: Summary of Key Feedback and Contemplated Revisions:** This document details the feedback received during the permanent rulemaking phase and describes the primary revisions ODE is developing in response for the final rule language to be presented in December.
- **Attachment B: Public Engagement Opportunities Overview:** This document provides a summary of the comprehensive public comment period, including the formal public hearing, online surveys, and other avenues for public input running through December 2025.
- **Attachment C: Planned ODE Implementation Supports:** This attachment provides a comprehensive overview of the guidance, technical assistance, and professional development supports ODE has planned to ensure a successful and equitable implementation of the permanent rules.
- **Attachment D: Equity Impact Analysis:** This document provides a focused analysis of the positive impacts this rule will have on students and families, particularly those from systemically marginalized communities.
- **Attachment E: Current Temporary Rule Text:** This attachment provides the clean text of OAR 581-015-2320 and OAR 581-015-2325 as temporarily adopted in June 2025, which serves as the baseline for the permanent rulemaking process.

22. Please note any additional support the Department is (or will be) providing to ensure successful implementation of this item.

- N/A; this item does not require any additional support.
- Communications plan
- Technical assistance, professional development, and/or coaching
- Direct or differentiated support for small, rural, or remote school districts
- Corrective Action Processes
- Safety measures
- Organizational culture or practice changes (change management)

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- Materials and/or supplies
- Guidance and/or supplemental resources
- Other: See attachment titled, "Planned ODE Implementation Supports"

23. Has this item changed since the last Board meeting?

- N/A; this item has not previously been before the Board
- No; same as last month
- Yes; please review Appendix A: Second Reading below.

APPENDIX A: SECOND READING

Appendix A should only be completed if "yes" is selected for question 23. Using plain language, this section should provide a summary of any additional engagements, learnings, or changes that have occurred since the First Reading of this item.

1. Please describe any additional engagement opportunities your office/team has pursued since the First Reading of this item. Which perspectives were intentionally included?

Please enter your answer here

2. Has your office/team received any additional public comment on this item? If so, who provided that comment and what feedback did they provide?

Please enter your answer here

3. Please describe any overall learnings that have occurred since the First Reading of this item. How were differences in opinion accounted for?

Please enter your answer here

4. Please provide a brief summary of the changes your office/team have made to this item since the First Reading. How are these changes responsive to identified needs and/or feedback received through the engagement process?

Please enter your answer here

APPENDIX B: GRANT CONSOLIDATION

Appendix B should only be completed if "yes" is selected for question 12. Using plain language, this section should provide additional detail on how grant rules have been aligned and designed to support districts and meet administrative needs.

1. Please indicate which of the following underlying processes are required for this grant program.

- Conduct a needs assessment

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- Gather and provide additional data
- Submit an application to ODE
- Submit a report to ODE
- Submit a plan to ODE
- Submit a budget to ODE
- Conduct community engagement
- Other: _____

2. How has your team/office worked to encourage more equitable resource allocation and address administrative impacts, particularly for small or rural school districts? How has this grant been aligned with existing grant programs?

Please enter your answer here

3. How are the grant requirements differentiated for small and rural school districts?

Please enter your answer here

Public Engagement Opportunities for OAR 581-015-2320 and OAR 581-015-2325

The Oregon Department of Education (ODE) is committed to a transparent and collaborative rulemaking process. To ensure all members of the public have an opportunity to provide input, ODE has launched a comprehensive public engagement campaign that will run until the Board's final vote in December. A dedicated rulemaking webpage serves as the central hub for all information and participation avenues.

In addition to targeted engagements already conducted, below is an overview of the key opportunities for public engagement.

1. Public Surveys

Two targeted online surveys gathered specific feedback on different aspects of the rulemaking package.

- **Implementation Resources Survey:** This survey focused on the clarity and usability of the draft guidance documents, forms, and other resources. The survey was available from **September 9, 2025** through **October 15, 2025**.
- **Rule Language Survey:** This survey is designed to solicit feedback on the proposed permanent rule language itself. It is open as of the first reading and will remain available through **December 10, 2025**.

2. Formal Public Hearing

A formal public hearing on the proposed permanent rules will be held on **November 18, 2025**. This meeting provides a dedicated forum for individuals to provide oral testimony directly to ODE regarding the proposed rule language.

3. Testimony and Written Comment to the State Board

There are multiple ways for the public to communicate directly with the State Board of Education throughout this process.

- **Written Comments:** Written testimony can be submitted at any time directly to the Board via email (StateBoard.PublicEmail@ode.oregon.gov) or mail.
- **Oral Public Comment:** The public has the opportunity to provide oral comment directly to the Board during their public meetings, including the First Reading on **October 16, 2025**, and the final vote on **December 11, 2025**.

ODE is committed to hearing from everyone who cares about disability rights in Oregon. We are actively seeking input from students experiencing disabilities and disabled students, parents and families, educators, advocates, legal professionals, and community members. This broad engagement is essential to creating final rules that respect the rights and dignity of all the students we serve.

Summary of Key Feedback and Contemplated Revisions

Following the Board’s temporary adoption of these rules in June 2025, the Oregon Department of Education (ODE) began a multi-phased public engagement process. We gathered extensive feedback from the State Advisory Council for Special Education (SACSE), Special Education Directors, disability advocates, families, and the public.

This document summarizes the key themes from that engagement and describes the primary revisions ODE is developing in response. This feedback has been invaluable, and the final rule language presented to the Board for adoption in December will be substantially strengthened by this collaborative process.

Theme 1: Affirmation of Student-Centered Principles

- **What We Heard:** Partners expressed significant appreciation for the foundational principles embedded in the temporary rules and implementation resources, including Supported Decision-Making, presuming competence, and dignity of risk. One disability advocacy leader shared, “I am grateful that ODE listened and incorporated so many student-focused supports in these resource documents. Well done!”. The consistent message was a strong desire to see this student-centered vision fully realized and clarified in the permanent rules.
- **ODE’s Contemplated Revisions for December:** ODE takes this feedback as a directive to ensure these principles remain central. We are contemplating ways to further strengthen the provisions related to Supported Decision-Making to provide even greater clarity for IEP teams on how to implement these practices with fidelity.

Theme 2: A Less Restrictive Option for Students with Fluctuating Capacity

- **What We Heard:** Special Education Directors strongly recommended a more flexible option for students whose capacity to provide informed consent may change over time. They noted that a permanent surrogate appointment is an overly restrictive solution for a disabled adult student or an adult student experiencing disability who has decision-making capacity on some days but not others.
- **ODE’s Contemplated Revision for December:** In direct response, ODE is developing language to allow for a “conditional surrogate appointment.” This would be a less restrictive option that would grant a surrogate decision-making authority only during specific, pre-determined periods when a student’s capacity is impaired, while honoring the student’s autonomy at all other times.

Theme 3: Procedural Clarity for Juvenile Court Appointments

- **What We Heard:** The State Advisory Council for Special Education (SACSE) identified a procedural gap regarding surrogate parent appointments made by the juvenile court, noting districts often lacked clarity on their legal duties in these cases.

- **ODE’s Contemplated Revision for December:** To address this, ODE is developing language that will clarify a school district’s responsibility to recognize, document, and honor a court-appointed surrogate upon receipt of a court order. This change will provide a clear, legally sound process for districts and ensure that court-ordered appointments are implemented with fidelity.

Theme 4: The Need for Practical Implementation Supports and Resources

- **What We Heard:** Throughout all engagement activities, partners consistently emphasized that the rule language itself is only part of the solution. District and ESD staff, particularly those in small and rural communities, raised valid concerns about the time, resources, and training required to implement these procedures effectively. We also heard a strong desire for practical, “how-to” resources like sample forms and templates.
- **ODE’s Response (Implementation Supports):** This feedback is the primary driver for the comprehensive suite of implementation resources ODE has developed. These supports include detailed guidance documents, a sample capacity determination form, and accessible “At-A-Glance” guides on Supported Decision-Making for students, parents, and educators. ODE acknowledges the resource concerns and is committed to providing ongoing technical assistance and exploring statewide training opportunities to support all districts in this important work.

Equity Impact Analysis for OAR 581-015-2320 and OAR 581-015-2325

Consistent with ODE's Education Equity Stance, the permanent adoption of these rules and their supporting resources is designed to advance educational equity by removing systemic barriers and promoting student agency. The framework provides a significant positive impact for students and families, particularly those who have been and continue to be systemically marginalized.

Promotes Student Agency and Self-Determination

This rule package actively challenges the historic presumption of incompetence that disabled students and students experiencing disabilities often face.

- By mandating that Supported Decision-Making be considered first, the framework prioritizes the student's own voice and choice.
- Accompanying resources, such as the [*Less Restrictive Alternatives to Guardianship*](#) guide and the *At-A-Glance* documents for [educators](#), [students](#), and [parents](#), are designed to empower adult students experiencing disabilities and disabled adult students to advocate for the least restrictive options that preserve their autonomy.

Removes Barriers for Systemically Marginalized Families

The rule solidifies an accessible, administrative pathway for families to secure decision-making support for their adult children without the burden of navigating complex and often costly legal guardianship proceedings.

- This is especially beneficial for families from historically underserved communities, including those in rural areas or from culturally and linguistically diverse backgrounds, who may face disproportionate barriers to legal services due to cost, language, or access.

Mitigates Potential for Bias in Decision-Making

The rule was intentionally designed with specific safeguards to mitigate the risk of bias, particularly against students with intellectual disabilities and/or complex communication needs. These safeguards include:

- Requiring a collaborative, full IEP team decision, preventing a unilateral determination.
- Structuring the use of objective data through the sample determination form.
- Mandating a regular, annual review of the decision to ensure it remains necessary.

In summary, this package of rules and resources represents a systemic shift toward a more equitable and empowering approach. It provides critical procedural clarity that is grounded in the belief that every student should be affirmed to reach their full potential.



Oregon

Tina Kotek, Governor



OREGON
DEPARTMENT OF
EDUCATION

Oregon achieves . . . together!

Dr. Charlene Williams

Director of the Department of Education

October 16, 2025

Members of the State Board of Education
Oregon Department of Education
255 Capitol Street NE
Salem, Oregon 97310

Subject: Recommendation for First Reading and Update on Proposed Permanent Amendments to OAR 581-015-2320 and OAR 581-015-2325

Dear Members of the State Board of Education,

The Oregon Department of Education (ODE) is pleased to submit this written report regarding the temporary rules for OAR 581-015-2320 and OAR 581-015-2325. This report serves two purposes: first, to recommend the Board approve the First Reading of the proposed permanent adoption; and second, to provide an update on the extensive partner engagement that has occurred since June and to share the direction of revisions we are contemplating for the final rule language.

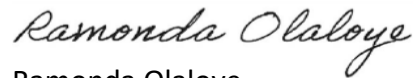
As you know, the temporary rules currently in effect close a critical regulatory gap and ensure Oregon's compliance with the Individuals with Disabilities Education Act (IDEA). Since their adoption, our continued partnership with the field has identified key areas for improvement. We are actively developing revisions to the temporary rule language to address this feedback and plan to present a final, strengthened version for your adoption in December. Notably, based on direct feedback from Special Education Directors, we are developing a new provision for a "Conditional Surrogate Appointment." This important addition would provide a more flexible and less restrictive option for supporting adult students who experience fluctuating capacity. We are also developing language to clarify district procedures for recognizing and documenting surrogate appointments made by the Juvenile Court, a need identified by the State Advisory Council for Special Education (SACSE).

To ensure successful implementation, ODE remains committed to providing a full suite of resources for the field. The enclosed report provides further details on partner feedback and our contemplated revisions. We believe this collaborative and responsive process will result in a final rule that is both legally sound and practically effective.

We respectfully request your approval at First Reading and look forward to presenting a final version for your consideration in December.

Thank you for your time.

Sincerely,

A handwritten signature in cursive script that reads "Ramonda Olaloye".

Ramonda Olaloye
Assistant Superintendent
Office of Enhancing Student Opportunities

581-015-2320
Surrogate Parents

(1) Each public agency must ensure that the rights of a child and, as determined appropriate under OAR 581-015-2325, adult student with a disability are protected by determining the need for, and when appropriate assigning, a surrogate parent when no parent (as defined in OAR 581-015-2000) with legal rights in respect to a student's educational decision making can be identified or located after reasonable efforts and additionally:

(a) The child is a ward of the state and there is reasonable cause to believe that the child has a disability; or

(b) The child is an unaccompanied homeless youth.

(2) The school district may not appoint a surrogate solely because the parent or adult student to whom rights have transferred is uncooperative or unresponsive to special education needs.

(3) Notwithstanding section (1) of this rule, each school district must have a method for determining whether a child or adult student, as determined appropriate under OAR 581-015-2325, needs a surrogate parent and for assigning a surrogate parent to the child or adult student, as determined appropriate under OAR 581-015-2325. The school district must ensure that each person approved to serve as a surrogate:

(a) Is not an employee of the school district or the Department or any other agency that is involved in the education or care of the child or adult student, as determined appropriate under OAR 581-015-2325;

(b) Is free of any personal or professional interest that conflicts with representing the child's or adult student's, as determined appropriate under OAR 581-015-2325, special education interests; and

(c) Has knowledge and skills that ensure adequate representation of the child or adult student, as determined appropriate under OAR 581-015-2325 in special education decisions.

(4) For an unaccompanied homeless youth, appropriate staff of emergency shelters, independent living programs and street outreach programs may be appointed as a temporary surrogate parent without regard to subsection (3)(a) until a surrogate can be appointed that meets all of the requirements of subsection (3).

(5) An appointed surrogate parent has all of the special education rights and procedural safeguards available to the parent.

(6) A surrogate is not considered an employee of a school district solely on the basis that the surrogate is compensated from public funds.

(7) The duties of the surrogate parent are to:

(a) Protect the special education rights of the child or adult student, as determined appropriate under OAR 581-015-2325;

(b) Be acquainted with the child's or adult student's, as determined appropriate under OAR 581-015-2325, disability and the child's or adult student's, as determined appropriate under OAR 581-015-2325, special education needs;

(c) Represent the child or adult student, as determined appropriate under OAR 581-015-2325, in all matters relating to the identification, evaluation, IEP and educational placement of the child or adult student, as determined appropriate under OAR 581-015-2325; and

(d) Represent the child or adult student, as determined appropriate under OAR 581-015-2325, in all matters relating to the provision of a free appropriate public education to the child or adult student, as determined appropriate under OAR 581-015-2325.

(8) A surrogate has the same rights granted to a parent in a hearing under OAR 581-015-2360, and the procedures regarding hearings in OAR 581-015-2340 through 581-015-2385 apply.

(9) A parent, or an adult student to whom rights have transferred, may give written consent for a surrogate to be appointed.

(a) When a parent or an adult student requests that a surrogate be appointed:

(i) The parent or adult student retains all parental rights to receive notice under OAR 581-015-2190, 581-015-2195, 581-015-2310, and 581-015-2315 and all of the information provided to the surrogate.

(ii) The surrogate, alone, is responsible for all matters relating to the special education of the child or adult student unless the parent or adult student revokes consent for the surrogate's appointment.

(b) The parent or adult student may revoke consent at any time by providing a written request to revoke the surrogate's appointment.

(10) The school district may change or terminate the appointment of a surrogate when:

(a) The person appointed as surrogate is no longer willing to serve;

(b) Rights transfer to the adult student, unless determined to continue to require a surrogate under OAR 581-015-2325, or the child or adult student, as determined appropriate under OAR 581-015-2325, graduates with a regular diploma;

(c) The child or adult student, as determined appropriate under OAR 581-015-2325, is no longer eligible for special education services;

(d) The legal guardianship of the child or adult student, as determined appropriate under OAR 581-015-2325, is transferred to a person who is able to carry out the role of the parent;

(e) A foster parent is identified who can carry out the role of parent under OAR 581-015-2000(20);

(f) The parent, who previously could not be identified or located, is now identified or located;

(g) The appointed surrogate is no longer eligible;

(h) The child or adult student, as determined appropriate under OAR 581-015-2325, moves to another school district; or

(i) The child or adult student, as determined appropriate under OAR 581-015-2325, is no longer a ward of the state or an unaccompanied homeless youth.

(11) A person appointed as surrogate will not be held liable for actions taken in good faith on behalf of the parent in protecting the special education rights of the child or adult student, as determined appropriate under OAR 581-015-2325.

(12) When it is determined that a surrogate parent is needed to protect the rights of a student with a disability as outlined above, the surrogate must be appointed not more than 30 days after the determination that the student needs a surrogate.

(13) The necessity of a surrogate parent must be reviewed at least every 365 days or when requested by the adult student or surrogate parent.

Statutory/Other Authority: ORS 343.041, ORS 343.045, ORS 343.055 & ORS 343.155

Statutes/Other Implemented: ORS 343.155 & 34 CFR 300.519

History:

ODE 33-2025, temporary amend filed 06/16/2025, effective 06/17/2025 through 12/12/2025

ODE 32-2025, temporary amend filed 06/16/2025, effective 06/16/2025 through 06/16/2025

ODE 6-2015, f. & cert. ef 3-11-15

Renumbered from 581-015-0099, ODE 10-2007, f. & cert. ef. 4-25-07

ODE 2-2003, f. & cert. ef. 3-10-03

ODE 23-1999, f. & cert. ef. 9-24-99

EB 11-1995, f. & cert. ef. 5-25-95

EB 9-1992, f. & cert. ef. 4-7-92

1EB 5-1980, f. 2-22-80, ef. 2-23-80

1EB 18-1979(Temp), f. & ef. 11-15-79

581-015-2325

Transfer of Procedural Rights at Age of Majority

(1) When a child with a disability reaches the age of majority under ORS 109.510 or 109.520, or is emancipated pursuant to 419B.550 to 419B.558, the rights accorded to the child's parents under the special education laws transfer to the child. A student for whom rights have transferred is considered an "adult student" under OAR 581-015-2000.

(2) Notwithstanding section (1) of this rule:

(a) After considering the adult student's preferences, interests, needs, and strengths based on age appropriate transition assessment, when the IEP team determines it is necessary, a school district shall appoint the parent of an adult student or, if the parent is not available, not willing, or not able, another appropriate individual to serve as a surrogate parent under OAR 581-015-2320 for any adult student who:

(i) has a disability;

(ii) is not able to provide informed consent with respect to their educational program as a result of their disability; and

(iii) is not already subject to a court order depriving them of decision-making authority or otherwise designating another person to make educational decision, as described below.

(b) In considering whether an adult student has the capacity to provide informed consent with respect to their educational program, the school district shall, at minimum, consider whether the adult student:

(i) Has any condition or circumstance that significantly interferes with their understanding of, and ability to participate meaningfully in, the IEP process, even with the use of supplementary aids and services; or

(ii) Experiences any significant limitations in communicating their educational concerns, or expressing their preferences, interests, needs, or strengths regarding their IEP in a way that interferes with their ability to participate meaningfully in the IEP process, even with the use of supplementary aids and services.

(c) In considering whether an adult is suitable to serve as surrogate parent for an adult student, the school district shall consider all of the following:

(i) Any indication of the adult student's preferences about who might serve as a surrogate parent;

(ii) If the parent is not appointed as the surrogate, any input from the parent about who might serve as a surrogate parent;

(iii) Whether the adult student has:

(I) a pre-existing relationship with the proposed surrogate;

(II) a history of positive interactions with the proposed surrogate; and

(III) a demonstrated comfort in the presence of the proposed surrogate;

(iv) Whether the other adult has:

(I) demonstrated an understanding of the responsibilities of a surrogate parent;

(II) demonstrated an understanding of and the willingness to apply the principles of supported decision-making for the benefit of the adult student; and

(III) demonstrated the capacity to reliably act to the benefit of the adult student.

(v) Any disqualifying factors listed in ORS 343.156.

(d) The determination that a surrogate parent is necessary can be made in any IEP meeting for the adult student. A separate meeting does not need to be convened for this purpose, unless requested by a member of the IEP team.

(e) Pursuant to a protective proceeding under ORS Chapter 125, the Probate Court may find the child to be incapacitated to make educational decisions and may appoint a guardian to exercise these rights.

(f) Under ORS 419B.220 or 419C.220, the Juvenile Court may appoint a surrogate parent to exercise these rights if the child is a ward of the state.

(3) If an adult student meets the criteria provided in section (2) of this rule for appointment of a surrogate, the school district must promote the least restrictive means for ensuring adequacy and continuity of educational services. A school district is not responsible for the costs of a protective proceeding unless the school district is the Petitioner.

(4) Pursuant to OAR 581-015-2320(9), a child to whom rights transfer may request that a surrogate be appointed to exercise the child's special education rights.

(5) This rule applies to all students, including students who are incarcerated in a state or local adult or juvenile correctional facility or jail.

Statutory/Other Authority: ORS 343.055 & ORS 343.155

Statutes/Other Implemented: ORS 343.155, ORS 343.181 & 34 CFR 300.520

History:

ODE 33-2025, temporary amend filed 06/16/2025, effective 06/17/2025 through 12/12/2025

ODE 32-2025, temporary amend filed 06/16/2025, effective 06/16/2025 through 06/16/2025

Renumbered from 581-015-0101, ODE 10-2007, f. & cert. ef. 4-25-07

ODE 2-2003, f. & cert. ef. 3-10-03

ODE 24-1999, f. & cert. ef. 9-24-99