Alsea School Board Meeting

Monday, April 13, 2026 6:00 PM
Staff Room, 301 S 3rd St, Alsea, OR 97324

1. **Call to Order**
   a. Flag Salute
   b. Approval of Agenda
2. **Consent Agenda**
   a. Approval of Minutes - 3.9.2026

Alsea School Board Meeting
Monday, March 9, 2026
6:00 PM
Staff Room

Alsea School District 7J
301 South 3rd Street
Alsea, OR 97324
541.487.4305

Board Members Present: Jamie Olsen, Russ Ceperich, George Laiblin, Soren Rounds, Risteen Follet at 6:42 PM
Board Members Absent: None
Staff Present: Stacy Knudson, Stephanie Lewis, Lora Nickle, Heather Shunk – online
Present Online: Staff and community were present online

1. **Call to Order: 6:01 PM**
   a. Flag Salute
   b. Approval of Agenda
2. **Adjourn to Executive Session – 6:02PM**
3. **Adjourn Executive Session – 6:41 PM**
4. **Return to Regular Session – 6:45 PM**
5. **Consent Agenda**
   a. Approval of Minutes
   b. Month End Reconciliation & Financial Board Report
   c. Resignation(s):
      Carrie Bridges, WLA bus driver
      Sarah Roy, Elementary Teacher
   d. Hire(s):
      Amber Wolfe, SPED Teacher - Long Term Sub
      Shane Mount-Rubenfeld, teacher - 6th Grade Long Term Sub
      Soren Rounds motioned to approve the Consent Agenda as presented. Russ Ceperich seconded the motion. Motion carried 5-0
6. **Patron Comments: None**
7. **Reports**
   a. Superintendent / K-12 Principal Reports
      i. Enrollment Report
      ii. Regular Attenders
      iii. Athletics and Activities
      Stacy Knudson presented her report to the Board. The documents are available online. The Board asked clarifying questions.
   b. K-5 LaHO Principal Report
      Heather Shunk presented her report to the Board. The document is available online.
   c. Business Manager Report
      Stephanie Lewis presented her report to the Board. The document is available online
8. **New Business**
   a. Quarterly Coaching Summary Report
      Stacy Knudson let the Board know this report is a grant funds received from ODE will be used for Inflection Coaching. This report is informational and does not require a vote.
   b. Certified Contract Renewal – Recommended
      The Board discussed their role with certified contract renewal.
      Risteen Follett made an executive motion as the Board of Directors recommends the renewals and extensions as presented in accordance to ORS 342.513 and ORS 342.845. Russ Ceperich seconded the motion. Motion carried 5-0

9. **Old Business**
10. **First Reading *(Shaded words are new/strikethroughs are deleted)**
11. **Second Reading**
12. **Board Comments**
    Risteen Follett thanks the staff that stepped up to take on the extra duties which saved the district money.
    Russ Ceperich let Stacy Knudson know that he thinks she is doing a great job. He and the Board feel that she is and will continue to do a great job.
13. **Future Agenda Items**
    Jamie Olsen reminded the Board that they will receive the materials to complete the superintendent evaluation.
14. **Key Dates**

    March 10th - Hang Up and Drive Assembly 9-12 grades,

    March 12th - Literacy Night, 4:30-6:00 PM

    March 16th - SAT Testing

    March 23 – 26th Spring Break

    March 30th – Winter Sports Awards

    April 13th – Alsea School Board Meeting
15. **Adjournment – 7:40 PM**

_____ _____

Risteen Follett, Board Chair

Stacy Knudson, Superintendent

b. Month End Reconciliation & Financial Board Report

MONTH END RECONCILIATIONS AND FINANCIAL REVIEW

REPORT Month: **March 2026**

1. Payroll Processing – Reviewed and approved by Human Resources
   - ☑ Payroll reconciliation reports reviewed prior to processing.
   - ☑ Federal and state deposits have been made, as well if quarterly, federal and state reports have been reviewed and submitted
   - ☑ OEBB invoice been reconciled to payroll
   - ☑ Workers Compensation reconciled to payroll
   - ☑ Deduction payment reconciliation reviewed to ensure all liabilities have been processed

V. Smallwood — April 7, 2026

Roxie Smallwood, Human Resource — Date

2. Deposits, Checks, Vouchers
   - ☑ All transactions have been entered into the financial accounting system and processed for the month.
   - ☑ All vouchers for checks and direct deposits have been reviewed and approved by the Superintendent.

Brynn Campbell — 4/7/26

Brynn Campbell, Accounts Payable/Receivable — Date

3. Bank Reconciliations – Completed and approved by Superintendent
   - ☑ Citizens bank account
   - ☑ Local Government Investment Pool

4. Federal and State reimbursement requests made during the month
   - ☑ Monthly claims made and approved by Superintendent
   - ☑ If applicable, quarterly claims and reports made and approved by Superintendent

5. Financial Statements
   - ☑ Prepared after all reconciliations have been completed
   - ☐ Any manipulation of general ledger transactions in preparing statements
     - ☑ None
     - ☐ Yes, list below:
       1. Accrued substitute payroll based on average cost per month by account code

6. Business Office Internal Controls – Any changes to current procedures?

   ☐ Yes – submitted to Board for review

   ☑ None

7. Other

   ☐ Business Office Internal Controls – Any changes to current procedures?

      ☐ Yes

      ☑ None

   _____

   _____

   _____

   ☐ Any new pronouncements that will impact financial statements or budget for 25-26 fiscal year.

      ☐ Yes, list below:

   _____

   _____

   _____

Other items that may have an impact on the financial statements of the district?

☑ None

☐ Yes, list below:

_____ 4/9/2026

Stephanie Lewis, Business Manager — Date

Deposits, Checks, Vouchers

☑ Created by Accounts Payable/Receivable and submitted to Superintendent for distribution

☑ The reports have been submitted to Board for review

☐ Has the Board of Directors responded to any items?

   ☐ Yes, and were all Board Members provided with the response

   ☑ None

_____ 4/9/26

Stacy Knudson, Superintendent — Date

Revised 12/1/2025

c. Hires and Resignations:
Pat McKnight, Dean of Students
Amber Wolfe, Special Ed. Teacher
Talon Sims, Athletic Director
Katelynn Schmidt, CTE Ag Sciences Teacher

Resignations:
Jake Schlecter, MS/HS Math Teacher

3. **Patron Comments:**

The Alsea School Board of Directors values the opinions and input of students, staff, parents, and community members. Although board meetings are held in public, they are not meetings of the public. Please keep your comments to 3 minutes or less. If you intend to speak to the board this evening, you will need to fill out one of the blue comment cards and hand it to the Board Secretary, Lora Nickle. Public comments may also be made via Zoom. If you intend to speak via Zoom, please put your name in the comments so that the board chair can call on you. Before you begin your comments, please state your name and if you are speaking for an organization, please state that organization. For more information about public comments at a board meeting, please see Alsea School District Policy BDDH.

4. **Reports**

a. Inflexion Anchors Summary

TWO ANCHORS
that **make** or **break** school change efforts

Why defining school identity and a vision for student readiness come first

Policy pressures, demographic shifts, and other influences have led to a crisis of identity in American public schools.[1] Many school communities lack consensus on the specific knowledge and skills all students should get from their education. Students struggle to succeed and don't graduate well prepared to contribute.

Schools CAN work for EVERY student

Many change efforts start with a focus on organizational structures or learning approaches. This is skipping steps. Too often, this approach results in situations where students and families do not see themselves in their school or instructional content. Attempts at system-level improvements are incoherent, sporadic, and unsustainable. Efforts and investments fall short. Students fall through the cracks.

Schools that have a **SHARED VISION FOR STUDENT READINESS** and a clear, shared **SCHOOL IDENTITY** are positioned to succeed.

These **TWO ANCHORS** provide support for what's needed to improve student outcomes.

Hurdles to school change

- **Low expectations**
- **Fatigue and teacher isolation**
- **Rigid or unrealistic initiatives**
- **Standardized testing diverts from real improvement.**
- **Fragmented efforts leave out some students or departments.**

[1] *Neumerski and Cohen, 2019*

ANCHOR*ONE*

Shared vision for readiness

*Define and communicate the holistic set of skills that **ALL** students need for success after high school.*



SHARED VISION FOR READINESS APPLIES TO THE WHOLE COMMUNITY

- Created in inclusive partnership with students, teachers, caregivers, and the larger community
- Includes transformative concepts that promote educational equity
- Shows the path for moving forward
- Gets communicated internally and externally

Addressing structures that advantage some and disadvantage others requires schools to first include and empower all stakeholders.

SHARED VISION FOR READINESS SEES THE LEARNER AS A WHOLE PERSON

- Considers the value of college, career, and life readiness
- Emphasizes interpersonal, intrapersonal, and metacognitive skills
- Values social-emotional skills and well-being
- Supports mental and physical health
- Incorporates postsecondary transitional skills
- Includes proficiency in numeracy and literacy

SHARED VISION FOR READINESS CONNECTS TO INSTRUCTIONAL CORE

- Goes beyond just stating desired student outcomes and provides clarity about the role of teachers and content in achieving success
- Gives direction on building the corresponding structures and conditions to foster professional development and collaboration
- Results in a more coherent organization that eliminates the silos and multiple identities typically found in large public schools

When your vision is connected to the instructional core (students, teachers, content), students understand how school connects to their future plans.

ANCHOR *TWO*

School identity

Create an explicit statement of what your school stands for and where it intends to go. Visibly express the shared values, beliefs, and ways of making sense of the world that are central, distinctive, and enduring to your school.

ROOTED IN ORGANIZATIONAL IDENTITY RESEARCH

- Foundational for sustaining a strong school culture and climate
- Defines the attributes that students and educators are expected to exemplify
- Helps schools through large-scale change efforts with cohesion and shared purpose
- Leads to behavioral change and shifts in deep-seated assumptions

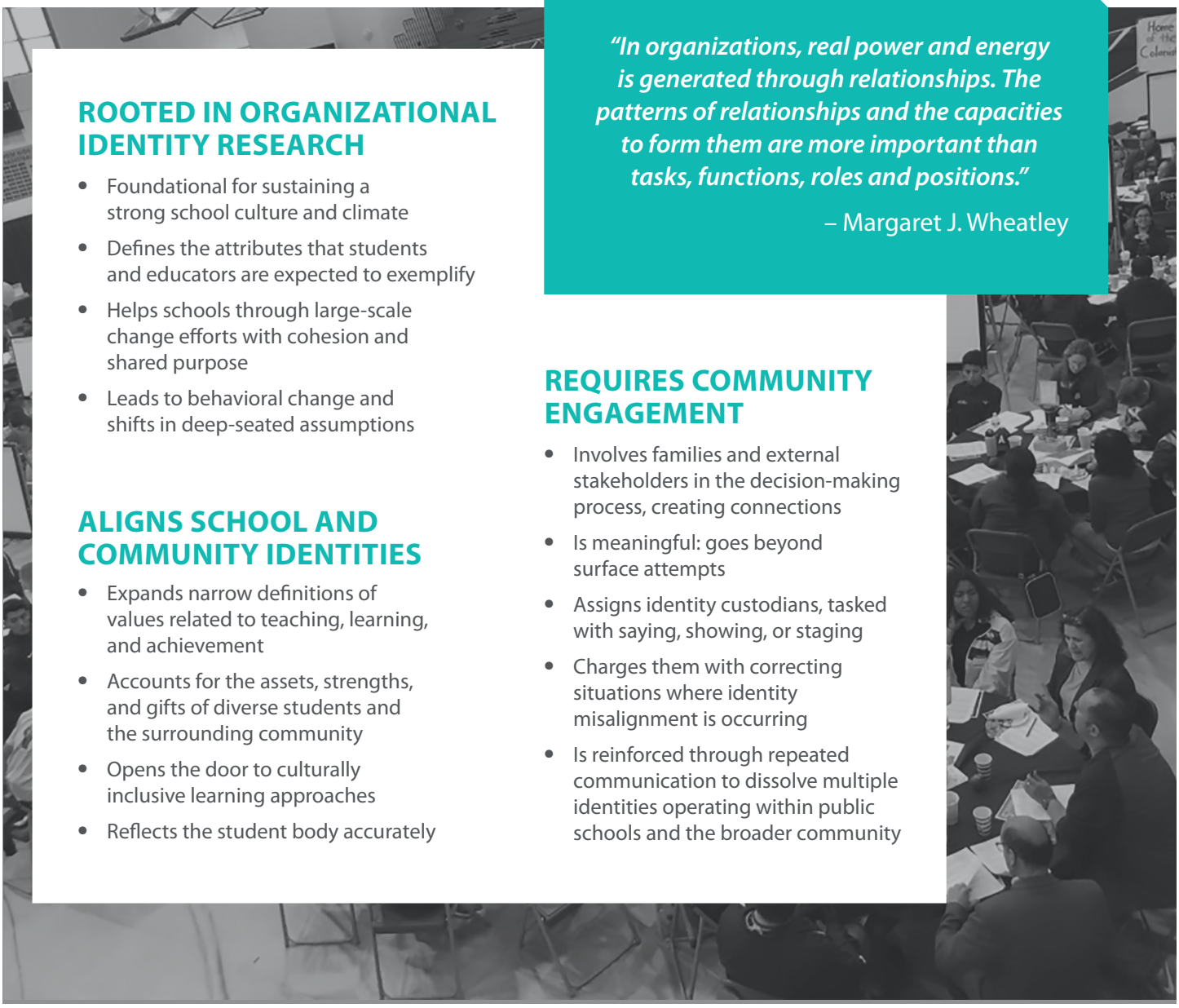
ALIGNS SCHOOL AND COMMUNITY IDENTITIES

- Expands narrow definitions of values related to teaching, learning, and achievement
- Accounts for the assets, strengths, and gifts of diverse students and the surrounding community
- Opens the door to culturally inclusive learning approaches
- Reflects the student body accurately

> ***"In organizations, real power and energy is generated through relationships. The patterns of relationships and the capacities to form them are more important than tasks, functions, roles and positions."***
>
> – Margaret J. Wheatley

REQUIRES COMMUNITY ENGAGEMENT

- Involves families and external stakeholders in the decision-making process, creating connections
- Is meaningful: goes beyond surface attempts
- Assigns identity custodians, tasked with saying, showing, or staging
- Charges them with correcting situations where identity misalignment is occurring
- Is reinforced through repeated communication to dissolve multiple identities operating within public schools and the broader community



THE ANCHORS *IN* ACTION

ONGOING AND MEANINGFUL STAKEHOLDER ENGAGEMENT

- Outreach ensures that dominant perspectives do not overpower the input and voice of historically marginalized groups of people.
- Privilege and power dynamics are identified and managed.
- Input is an authentic process not a symbolic exercise.

APPROACHES TO LEARNING ALIGNED TO A SHARED VISION FOR READINESS

- Universal approaches that align with a holistic vision for readiness are foundational for 21st-century readiness.
- Classrooms that recognize and develop a broad set of skills allow for strength-based approaches.
- Strategic and intensive supports aligned with academic, behavioral, and social-emotional development ensure all students can be served well.

COHERENT ORGANIZATIONAL STRUCTURES

- Structures, practices, and policies that reflect the identity of the school reinforce and sustain the values and beliefs.
- Coherence between organizational structures and approaches to learning is made possible and is anchored to both shared identity and a vision for readiness.
- Leadership decisions can be made with the community in mind and on behalf of all students.

"We are making decisions that impact and change a student's life forever and if you don't have something that you can adhere to as a school, then what are you basing those decisions on?"

– Dr. Courtney Robinson,
Ocean View High School Principal







A shared vision for readiness and school identity bring about improved decision-making.

- It becomes an explicit part of the hundreds of decisions made by administrators, teachers, students, parents, and other stakeholders every week.
- It answers the questions, Is this who we are? Does this align with what we are trying to achieve for all students?
- It guides school leaders toward internal coherence—a powerful approach for promoting organizational learning and school improvement.
- It's the foundation for systems and supports that ensure all students graduate ready for college, career, and life.



inflexion

decisions that drive student readiness

To download our full report ***Two Anchors that Make or Break School Change Efforts*** and to learn more about an evidence-based approach to improving student success, visit **bit.ly/twoanchors**

To read our full report
Two Anchors that Make or Break School Change Efforts
and to learn more about an
evidence-based approach
to improving student success,
CONTINUE SCROLLING

THE ANCHORS

A School's Identity and its Vision for Readiness

ABSTRACT

In this brief, we describe the theoretical rationale and educational research that supports the importance of identity and a shared vision for readiness to guide school change efforts. To do so, we introduce the concept of organizational identity and how it is applicable to the public school setting. We argue school leaders must authentically engage the communities they serve to ensure they know who they are and where they want to go. With a solid sense of identity, school leaders can begin creating a shared vision for readiness that represents their community and speaks to the knowledge, skills, dispositions, and attitudes stakeholders envision most important for students' success after high school. This brief also describes how the connection between a school's identity and its vision for readiness serve as the anchors from which school leaders make decisions that lead to coherent organizational structures and aligned learning approaches. When such systems exist, schools are well positioned to understand the holistic needs of students and provide the necessary support for achieving educational equity across a range of student outcomes.

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EXECUTIVE SUMMARY

How do public schools, especially large comprehensive high schools, achieve and sustain equity-focused school change that improves outcomes for all students? This question has gone unanswered and continues to perplex educators, researchers, and policymakers alike. Perform a search for resources and information about school change, improvement, or turnaround and you will find a staggering number of books, articles, and reports. Among the theories and practices that have emerged in the school improvement space, few--if any--are strategies that prove to work universally and in any context. Additionally, there have been countless grant-funded projects, district initiatives, and other reforms that have come and gone, with very few showing effectiveness or duplicability to stand the test of time. Although there are no concrete answers on what strategies and approaches work to efficiently and sustainably improve school systems, promising practices have been found. For instance, researchers and practitioners have been able to isolate and identify, at least in part, some of the critical components that must be in place for educational leaders to effectively position their school systems to improve (Fullan, 2016).

Based on the work of organizational scholar Peter Senge and his associates (2012) and their assessment of the most influential factors within successful organizations, we know that a critical component of school change is having, or creating, an explicit vision for what a school wants to achieve for its students. Taking Senge's findings a step further, we have learned—through our direct work with school systems of all shapes and sizes—that a school seeking to achieve and sustain positive and equity-grounded change must adopt a clear, coherent, and holistic vision. This holistic vision must include clarity regarding the factors needed for success after high school—we have coined this tangible item as a school's ***vision for readiness***. Through our extensive research and history of examining what it means for a young person to become prepared for everything that life brings post-high school—or what we call "life ready"—it takes more than just attaining academic knowledge and skills. Knowledge, such as content learned in language arts or science courses, is important; nurturing strong dispositions and attitudes for learning are just as critical—and in many cases even more critical to the preparedness of young people being ***life ready***. Our work with more than 100 schools has shown that school systems that value the strengths and assets of all students have adopted and implemented a vision for readiness that prioritizes a holistic and inclusive set of outcomes.

Although a shared vision for readiness is a clear prerequisite to the school change process, our experiences in the field have shown that there are two anchor points that must be established to correctly align and guide school change efforts. In addition to a shared vision for readiness, the school needs a clear ***identity***. In its simplest form, a school's identity is what it "stands for" and helps determine "where it intends to go" (Albert et al., 2000, p. 13). When examined through this perspective, a school's vision for readiness can become the most visible, tangible, and useful expression of its identity. Therefore, a school's identity, or what it stands for, includes the shared values, beliefs, and mental models (i.e., ways of seeing, understanding, and making sense of the world) that are central, distinctive, and enduring to the school (Albert et al., 2000, p. 13). Similarly, a school's shared vision for readiness, which should be rooted in identity, describes where it intends to go. When this foundational work is done effectively, the development and expression of shared values, beliefs, and mental models can help bridge the gap that so often exists between a school and the community it serves (Yosso, 2005).

In this brief, we describe the rationale and evidence that supports our approach to successful school change that promotes student readiness: the Inflexion Approach. Foundational to our understanding is the concept of organizational identity, which we connect to public schools throughout. Although school identity is relatively new to education research, the concept of organizational identity has a rich history and is well researched in the fields of management and organizational studies. Through our understanding of the literature, our field-level expertise, and our experiences of working alongside schools to implement structural changes, we have created a promising approach that supports sustainable school change at the systemic level to achieve readiness for every student.

SCHOOL IDENTITY

A commonly accepted definition of identity are those attributes of an organization that are central, distinctive, and enduring (Albert & Whetten, 1985). Unfortunately, based on our field-based experiences in and around high schools, the central, distinctive, and enduring attributes of a school are rarely made explicit nor shared across stakeholders. This is partly because the key attributes of identity are based on individuals' ***values, beliefs,*** and ***mental models***, which are "abstract, complex, and/or highly subjective" (Bartel et al., 2016, p. 482). For example, many school's claim to value creativity, but how creativity is defined, what creativity looks like inside and outside the classroom, and how parents and teachers can support students in being creative is often left up to the imagination.

Taken together, shared values, beliefs, and mental models make up the foundation of a school's identity. It is important to note, however, that factors outside of shared values, beliefs, and mental models can exert significant influence on a school's identity, especially if not addressed. At the local level, the "traditions" and "histories" that alumni, staff, and other community members carry with them can have a profound and enduring influence on a school's identity. For example, as the demographic makeup of a school changes across time, what is valued by the broader community may change in ways that challenge the enduring attributes that are held closely by alumni and long-serving staff.

Emerging research also suggests public school leaders are facing near-constant threats to their school's identity (Neumerski & Cohen, 2019). Threats to identity can be internal events (e.g., scandals, changes in leadership), external events (e.g., new state policies, negative media coverage), or ongoing changes to the overall environment (e.g., economic recessions, changing school demographics). Those events and changes cause all or some stakeholders to question the central, enduring, and distinctive attributes of their school's identity (Petriglieri & Devine, 2016). For example, the standards and accountability movement, now well into its fourth decade, has put immense pressure on schools to improve student academic outcomes, generally, and close opportunity gaps between low- and high-performing students on traditional academic metrics. When the response (whether required by law or not) to these pressures and sanctions is to redesign school systems, it can fundamentally alter the central, enduring, and distinctive attributes of a school's identity.

Unfortunately, organizations, including schools, "often fail to respond adequately to identity threats" (Petriglieri & Devine, 2016, p. 252). One reason for failing to respond adequately, if at

all, is because not all stakeholders may view an event or an ongoing environmental change as threatening to their school's identity. Schools also fail to respond to potential threats because they do not have a solid sense of who they are or what they want to achieve for all students. In other words, schools often lack a shared identity. And if they do have a solid identity built on shared values, beliefs, and mental models, that identity is often exists beneath the surface and is not made explicit to all stakeholders.

THE NEED TO DEVELOP AND COMMUNICATE A SHARED IDENTITY

In our field-based work, we have observed that public schools encounter many factors that influence its identity, including a lack of shared values, beliefs, and mental models; internal and external forces (e.g., policy pressures and demographic changes); and the existence of multiple identities (Pratt, 2016). Schools, alongside the communities that they serve, can counter these factors by developing a shared identity that creates connections between different internal and external stakeholders. However, for these actions to be effective, schools must ensure that whatever shared identity is created truly represents its students and the communities they come from.

The misalignment of school and community identity. In general, we have argued that a school generally does have an identity that is seen, heard, and/or felt by the community it serves. In schools that serve communities of Color, there is often a misalignment of identity between the school and community served (Battistich, Solomon, Watson, & Schaps, 1997; Schaps & Solomon, 1990). The U.S. public school system has been built on narrow definitions of values related to teaching, learning, and achievement that represent Eurocentric values and perspectives. That antiquated foundation and the persistent structural racism and inequities experienced by many communities of Color often result in a school identity that fails to account for myriad assets, strengths, and gifts of its diverse students and surrounding community. In many circumstances, the consequences of misaligned school identities have been severe. In a wide-ranging literature review on "How People Learn," the National Academies of Sciences, Engineering, and Medicine asserted, "A significant factor in school failure may be a mismatch between the socialization practices a student experiences at home and what and how they are taught in school" (2018, p. 72).

Using stakeholder engagement to improve identity alignment. Through our work and experience with schools, we have found that stakeholder engagement is perhaps the most effective way of bringing a school's identity into alignment with the identity of the community it serves. There are several ways schools can facilitate stakeholder engagement, such as simply providing families with ongoing communication about school activities, encouraging volunteering and collaboration with community organizations, and involving families in the decision-making process (see Epstein et al., 2019). To be clear, these and other types of stakeholder engagements can all help bridge the gap between families and educators to promote greater alignment between school and community identities. In this brief, we focus on involving stakeholders in the decision-making processes as a way to generate tangible statements of identity, such as a shared vision for readiness. Schools take a significant step toward creating culturally responsive learning

approaches when they embrace and leverage the assets of their communities to create a shared vision for readiness (Sanders & Galindo, 2014). Below we describe stakeholder engagement processes meant to generate a shared vision for readiness that is anchored in the key attributes of a school's identity.

SHARED VISION FOR READINESS

Based on our work with over 100 schools in the past 5 years, we find that a shared vision for readiness is the most useful, tangible, and authentic statement of a school's identity. These statements of identity can also include a description of shared values and beliefs or a postsecondary readiness definition. Although all statements of identity are worthwhile topics, we focus exclusively on a shared vision for readiness, which can be an invaluable tool for guiding schools through large-scale change efforts with cohesion and shared purpose. A common finding across organizational theory (e.g., Senge et al., 2012) and educational research (e.g., Leithwood, Harris, & Hopkins, 2008) is that developing a shared vision is a prerequisite for continuous improvement.

There is no one right way to develop a shared vision for readiness that is grounded in a school's identity. That said, there are several essential processes that school leaders can institute to ensure visions are representative of its identity. Below we discuss how a school's vision for readiness should be

- representative of all stakeholder groups;
- connected to the instructional core;
- inclusive of transformative concepts that promote educational equity;
- consider the value of college, career, and life readiness; and
- communicated widely both internally and externally.

We end by briefly discussing how setting the two anchors for school change—a school's identity and its vision for readiness—can guide school leader decision-making.

Ensuring representativeness and minimizing power differentials. In terms of both input and participation, schools must work to secure a representative group of participants. In particular, research shows certain groups of individuals are less likely to participate in stakeholder engagement (e.g., single parents, stakeholders with diverse cultural and linguistic backgrounds; Epstein et al., 2019). Simply sending out invitations to provide input or participate in a school-based event is not enough (Epstein et al., 2019). If schools take an equitable approach, they make intentional efforts and investments to reach those stakeholders they know are less likely to engage with school staff. Schools must also put in place systems explicitly designed to ensure that dominant perspectives do not overpower the input and voice of historically marginalized groups of people (Hand, Penuel, & Gutiérrez, 2013). When privilege and power dynamics are not identified and managed, soliciting input can turn into a symbolic exercise rather than an authentic process that leads to a shared vision for readiness representative of the school and its community.

Unfortunately, as many educators know, shared visions are not always developed in partnership with students, parents, and other members of the community. Surface level stakeholder engagement diminishes the power of shared visions for generating a mutual understanding of purpose and commitment from parents, students, and the broader community (Senge et al., 2012). When district

and school leaders fail to meaningfully engage a representative group of stakeholders, they often revert back to the default option and create the vision by themselves or with a small group of leaders that may or may not include teachers. This does not mean school leaders should take a completely hands-off approach. Rather, it is the job of school leaders to translate the information provided by stakeholders into a vision for readiness that is not so broad that it is meaningless, but also not too detailed that it is unmemorable. School leaders are also best positioned to understand how to connect their vision to the school's instructional core.

Connecting visions to the instructional core. As Senge and colleagues (2012) found, shared visions should be grounded in the current reality, clearly articulate future aspirations, and provide a path for moving forward. One way to do this is to connect the vision to the instructional core. In their book on creating the conditions necessary for continuous school improvement, Forman, Stosich, and Bocala (2018) argue connecting a vision to the instructional core (i.e., students, teachers, content) marks the beginning of the improvement cycle. The authors maintain that to be effective, visions must go beyond articulating desired student outcomes to also provide clarity about the role of teachers and content in achieving success. To realize their vision, school leaders must also build corresponding "structures and conditions to foster professional development and collaboration" (p. 62). The result of connecting a vision to the instructional core and making corresponding organizational structural changes is a more coherent organization that slowly eliminates the compartmentalization and multiple identities that are typically found in large public schools.

Including transformative concepts to promote educational equity. School leaders also should work to translate information from stakeholders into transformative concepts for improving educational equity. Kose (2011) used interviews with 15 principals identified by their colleagues as leading for equity to determine the practices that enable the development of transformative school visions. Transformative leadership entails helping stakeholders understand and ultimately address issues related to equity, social justice, diversity, and oppression. Kose found these exemplary principals included explicit discussions around transformative concepts and sought the inclusion of traditionally marginalized stakeholders during the vision development process. The content of the vision statements and the focus on transformative concepts, in particular, depended on the existing context, including the history of the school, the power dynamics between different stakeholders, and the level of support or resistance among stakeholders. Regardless of the content, vision statements became an important vehicle for facilitating transformative leadership.

Considering the value of college, career, and life readiness. Given the heavy emphasis on traditional metrics in measuring student achievement to evaluate school quality and college admissions processes, it comes as no surprise that schools focus so intently on improving standardized test score performance This inequitable focus on traditional academic metrics has created a false sense of readiness and has also highlighted why balancing college, career, and life readiness becomes so important in vision for readiness statements. Speaking to a holistic set of knowledge and skills is likely to be more representative of a school's identity and sends a signal to stakeholders that the school values the whole child versus exclusively valuing traditional academic content and performance outcomes. Further combating this content-driven idea of readiness and success, a steady stream of research during the past decade has shown that students need much more than proficiency in numeracy and literacy to be successful after high school (Conley, 2014; Farrington et al., 2012; Jones & Kahn, 2017; National Academies of Science, Engineering, and Medicine, 2018; National Research Council, 2012). This research shows students' interpersonal,

intrapersonal, and metacognitive skills; social-emotional well-being; mental and physical health; and general postsecondary transitional skills are just as, if not more, important to their success after high school as academic content knowledge.

Communicating a school's vision to reinforce its identity. Once a school adopts a formal vision for readiness, an important next step is to "communicate this change to stakeholders" (Bhatt, Van Riel, & Baumann, 2016, p. 444). This is especially important given the high likelihood of multiple identities operating within public schools and the historical disconnect between schools and communities. To help communicate an organization's identity, Schinoff, Rogers, and Corley (2016) argue for ***identity custodians***. Identity custodians are individuals who convey messages related to an organization's identity using three primary methods: ***saying, showing,*** or ***staging***.

Perhaps the most common way of communicating a school's identity is by ***saying***, which includes individual conversations, mass emails, and other forms of direct communication with internal and external stakeholders. A school might initially roll out its vision for readiness using a mass email to students, parents, and staff. Ideally, this email would also illustrate how the vision for readiness connects to the school's shared values, beliefs, and mental models, helping demonstrate where the school is intending to go aligns with what the community wants for all students. ***Showing*** ranges from formal and informal mentoring, the characteristics of the physical space a school resides in, images that appear on walls, and other similarly themed artifacts. A school might highlight of individuals or groups that exemplify the its shared values and beliefs. Finally, ***staging*** occurs when students, families, teachers, and other stakeholders are provided with opportunities to enact or experience the school's identity, either during one-time events or through rituals and routines. As we describe in the longer version of this brief, parent learning walks are one way to build stronger connections between the school the community it serves.

Though informal identity custodians may exist in schools, our experience tells us that schools must be explicit about assigning specific individuals the responsibility for saying, showing, or staging as well as identifying situations where clear identity misalignment is occurring. When saying, showing, or staging, identity custodians are most likely to build coherence across a school when they convey messages with high clarity and intentionality. Perhaps even more important, identity custodians should tie their messages, examples, and activities explicitly to the shared values, beliefs, and mental models that define the school's identity as a way to build awareness and understanding.

SETTING THE ANCHORS FOR SCHOOL CHANGE

In the first steps of school change, school leaders have the immense responsibility of shepherding stakeholders through a process that unearths the shared values, beliefs, and mental models that are used to create a shared vision for readiness. Furthermore, this complex process must result in an outcome that speaks to the core of the school's identity and acts as a bridge that closes the gap between the school and the community it serves. Following the initial steps, the alignment of the school's organizational structure and its learning approaches to its identity and vision for readiness should follow. This is not a small nor easy task because vision without execution is just a hallucination. School leaders make hundreds of decisions during the course of any given week related to any number of issues; how these decisions align or do not align to the school's

identity and its vision for readiness should be an explicit part of every decision. When decisions are informed by a vision for readiness, the school leadership works toward internal coherence— a powerful approach for promoting organizational learning and facilitating school improvement (Forman et al., 2018).

In sum, there is an immense need for schools to authentically engage their communities to develop shared values, beliefs, and mental models that become the core components of a shared identity. Bridging the gap between schools and the communities they serve is essential for organizing schools to improve in a continuous and equitable manner. Creating a shared vision for readiness that is informed by a representative school identity signifies a critical step in the improvement process. Importantly, this step cannot be ignored. School change too often centers on changing the organizational structures or learning approaches in a school. Both are necessary, and both are insufficient on their own. And if those changes to structures and the learning approach continue to lead to a situation where students and families do not see themselves in their school, these efforts and investments will continue to fall short. That is, identity and vision work are essential for setting the stage for effective structural and learning approach work. A school's identity and its vision for readiness become the anchors from which all decisions related to structures and learning approaches are made. Based on what we have found in our work with schools, when these anchors do not exist, schools will continue to suffer from incoherent, sporadic, and unsustainable attempts at system-level improvement.

> ***A school's identity is what it "stands for and where it intends to go."***
>
> – Adapted from Albert, Ashforth, and Dutton (2000, p. 13) work on organizational identity

INTRODUCTION

How do public schools, especially large comprehensive high schools, achieve and sustain school change grounded in educational equity? This question has perplexed educators, researchers, and policymakers alike since at least 1965 with the Elementary and Secondary Education Act (American Institutes for Research, 2011; Peck & Reitzug, 2014). A staggering number of books have been written on the subject. Several programs promise to have the answer, if only implemented with strict fidelity. And countless grant-funded projects, district initiatives, and other reforms have come and gone, with very few showing effectiveness or sticking around. Yet, we have learned a little bit about what does work—including some of the critical components that must be in place for educational leaders to effectively position their school systems to improve (Fullan, 2016).

We have learned that school change is a process that, when done right, incrementally improves schools in ways that address and dismantle inequitable structures and practices (Welborn, 2019). This is especially true when those structures and practices are equitable and aligned in ways that support students by tapping into the strengths and assets they bring to their school (Gooden & Davis, 2016). We have also learned, based on the work of Senge and colleagues (2012), that a critical component of school change is an explicit vision for what a school wants to achieve for its students. Taking it a step further, we argue that a school seeking to achieve and sustain positive and equity-focused change must adopt a clear, coherent, and holistic vision that speaks to the range of factors needed for success after high school—what we refer to as a school's ***vision for readiness***. As an organization, we acknowledge that academic knowledge and skills are important, but not sufficient, for the holistic level of readiness that generates success in a post-secondary school life. It is equally important, and arguably more important, to nurturing strong dispositions and attitudes for learning. A clear, coherent, and holistic vision for readiness, then, needs to be a thorough consideration of the learner as a whole person.

One would be hard pressed to find literature that disagrees with the notion of schools needing a clear and coherent vision for readiness, especially when pursuing large-scale school change. Yet, the literature around school change has identified a significant obstacle that has been referred to as a lack of "consensus of outcomes" (Cohen, Spillane, and Peurach, 2017). Put plainly, this lack of consensus is the absence of a shared vision for readiness. The difficulty in creating and effectively using a vision for readiness comes in part from the historical tendency of school system leaders to "differentiate programs and outcomes" (Cohen et al., 2017, p. 207). School leaders commonly delegate the responsibility of prioritizing specific student outcomes to individual content-specific teachers and their classrooms (Peurach, Yurkofsky, & Sutherland, 2019). The standards and

accountability movement altered the common practice of isolation and differentiation by requiring schools to pursue common sets of outcomes for all students. Requiring common outcomes has resulted in some positive changes, such as raising awareness of educational inequities and holding schools accountable to serving all students; this strategy has also created unintended consequences such as requiring schools to pursue a narrow set of traditional achievement outcomes that excludes the assets and skillsets of many historically marginalized groups of people (Yosso, 2005).

Exploring the unintended consequences a bit more, standards and definitions of achievement are primarily aligned to numeracy and literacy proficiency. This limited lens of measurement and alignment has resulted in the neglect of other important knowledge, skills, dispositions, and attitudes associated with student readiness and success (see Side Bar). We refer to the collection of knowledge, skills, dispositions, and attitudes as a holistic set of outcomes, which span multiple domains, including but not limited to students' social-emotional well-being (e.g., Jones & Kahn, 2017); their interpersonal, intrapersonal, and metacognitive skills (e.g., National Research Council, 2012); and their readiness to tackle the transition to college, career, and life in general (e.g., Darling-Hammond, Wilhoit, & Pittenger, 2014). Schools that value the diversity of strengths and assets that all students have will adopt and pursue a vision for readiness composed of a holistic set of outcomes.

Although a shared vision for readiness is a clear prerequisite to the school change process, we argue it is just one of the anchors that should guide such efforts. The other anchor is a school's ***identity***. In its simplest form, a school's identity is what it "stands for and where it intends to go" (emphasis added; Albert et al., 2000, p. 13). In this sense, a school's vision for readiness can become the most visible, tangible, and useful expression of its identity. A school's identity, or what it stands for, includes the shared values, beliefs, and mental models (i.e., ways of seeing, understanding, and making sense of the world) that are central, distinctive, and enduring to the school (Albert & Whetten 1985). A school's shared vision for readiness, which ideally is derived from its identity, signifies where it intends to go. As we describe at length in this practitioner brief, authentic and ongoing stakeholder engagement is essential for schools to both know who they are collectively and where they intend to go. When done effectively, the development and expression of shared values, beliefs, and mental models can help bridge the gap that so often exists between a school and the community it serves (Yosso, 2005).

KNOWLEDGE, SKILLS, DISPOSITIONS, AND ATTITUDES

A holistic vision for readiness defines the knowledge, skills, disposition, and attitudes a school community aims to instill in all students. Importantly, a holistic vision must go beyond just knowledge or skills. Brighouse, Ladd, and Loeb (2018) use the term "educational goods" to describe the holistic set of knowledge, skills, attitudes, and dispositions that provide students with the "capacity to function in the labor market, to be a good democratic citizen, to develop healthy personal relationships, and to treat others with respect in dignity"—in addition to performing well academically (p. 2).

Below we use Brighouse et al.'s work to provide simple definitions of knowledge, skills, dispositions, and attitudes. We then use the example of a group of students being tasked with creating a word problem for solving an algebraic equation to bring these constructs to life.

- Knowledge refers to an understanding of facts, procedures, and other information.
- Skill refers to the ability to complete a task.
- Disposition refers to the ability to act upon one's knowledge and skills.
- Attitude refers to the conscious ways of thinking and feeling about people and things.

Now, consider a class of 9th grade students that is tasked by their teacher to work in groups to create a word problem for solving an algebraic equation. This word problem, the teacher explains, should be designed to be accessible for students whose first

language is not English. In this school, the majority of students whose first language is not English are recent immigrants from Vietnam. This school also has explicit shared values that include creativity, collaboration, curiosity, empathy, equity, and cultural relevancy.

As a prerequisite for completing this task, students need to be knowledgeable about what solving equations algebraically entails and have the skill to actually solve different types of equations. In terms of dispositions, it is equally important students have the confidence to creatively apply their knowledge and skill to the task at hand and the curiosity to learn about Vietnamese culture by collaborating with their newly arrived classmates on the task itself. Students whose first language is English also must exercise skills in empathy to understand how difficult it can be to understand an algebra word problem when you are learning a new language. Finally, students must have a positive attitude toward equity and cultural relevancy with an understanding that people learn best when they are provided with the support they need and the content they are exposed to resonates with their cultural and personal backgrounds.

When a teacher helps make explicit connections to shared values for students, an algebra word problem can go far beyond simply practicing knowledge and skills and can be transformed into an opportunity to reinforce a school's identity, strengthen its culture, and enhance educational equity for students traditionally marginalized in public schools.

Further, these inclusive developments and processes can produce the information needed to develop a shared vision for readiness.

This brief describes the theoretical and practical rationale behind the Inflexion Approach. We introduce the concept of organizational identity and its connection to public schools, including how education policy pressures, rapid demographic changes, and other external environmental influences have led to a crisis of identity in public schools (Neumerski and Cohen, 2019). Although school identity is relatively new to education research, the concept of organizational identity has a rich history in the management literature and in organizational studies. We go on to describe how it is essential for school leaders to engage their community to truly know who they are and whom they serve. Without this solid sense of school identity, educational leaders are unlikely to develop a shared vision for readiness that represents the broader school community. We then describe how the connection between a school's identity and its vision for readiness serve as the anchors from which school leaders make decisions that lead to coherent organizational structures and aligned learning approaches. When such systems exist, school personnel are well positioned to understand the needs of individual students and provide the necessary support for achieving educational equity across a range of student outcomes.

ORGANIZATIONAL AND SCHOOL IDENTITY

The concept of organizational identity was first introduced by scholars in the 1980s (Albert & Whetten, 1985). Since then, organizational identity has been the subject of numerous studies in nearly all corners of social science, including anthropology, sociology, political science, psychology, and economics (Akerlof & Kranton, 2005; Pratt, Schultz, Ashforth, & Ravasi, 2016). It was not until 2019, however, that organizational identity made its way into conversations about schools (see Educational Policy, Issue 6). Instead, the concept has been lumped in with the neighboring concepts of culture, climate, and image or brand. Because of this, we start by defining these concepts and show how a school's identity is distinct from, yet very much related to its culture, climate, and external image/brand.

Defining Identity and Related Concepts

As Neumerski and Cohen (2019) argue, "[o]rganizational identity is not the most tidy concept in social research" (p. 910). The same could be said of culture and climate (Houte, 2005). Adding to the complexity of these organization-specific concepts is the fact there is little consensus on a definition for identity, culture, climate, and image/brand. In order to frame these concepts, we draw on organizational theory (Demers, 2007; Ravasi, 2016), education research (Houte, 2005; Spillane, Seelig, Blaushild, Cohen, & Peurach, 2019), and insights from our own national and international field-based experiences to provide brief definitions of each concept as they apply to public schools.

Culture: A school's culture is shaped and reinforced by the prevailing norms, behaviors, attitudes, structures, and practices that are commonplace, whether they are explicitly stated or more implicit in nature.

Climate: A school's climate includes its culture, but also extends to its overall environmental quality, including but not limited to its physical surroundings and the general atmosphere resulting from the school's location, setting, and condition.

Image/Brand: A school's image could also be referred to its reputation, which is shaped by external perceptions of the school and from efforts of those within the school to shape those perceptions with rhetorical devices, such as branding and other statements of identity.

Identity: A school's identity includes the shared values, beliefs, and mental models that are central, distinctive, and enduring. Said differently, a school's identity refers to "those attributes that members feel are fundamental to (central) and uniquely descriptive of (distinctive) the organization and that persist within the organization over time (enduring)" (Spillane, et. al., 2019, p. 852).

To illustrate the role of school identity and its relation to culture, climate, and image/brand, we use the image and concept of an oak tree. The oak tree's root system is below the surface but the importance of the root system is constant and omnipresent in the life and vitality of the tree. The tree's root system provides stability to its structure and nourishes the tree with water and nutrients across the seasons. Unless we have developed an explicit awareness of a tree's root system, we may ignore its existence. The same tension exists for a school's identity and culture—though both may provide vital sustenance, both have limited visibility in the day-to-day lives of students and educators.

The trunk represents the through line from the school's identity to the shared vision for readiness that drives a tendency toward development and vitality. The branches of the tree represent the natural outgrowth of structures that promote stability, balance, and productivity, serving as the physical limbs from which the leaves, flowers, and nuts may grow. The leafing and budding represents the dynamic engagement of teaching and learning that all parts of a school are meant to support. Like the process of photosynthesis, the resulting student success and contributions feed into and strengthen the structures of the school and reinforce a school's identity and vision for readiness.

The surrounding ecosystem, including the air quality, nearby buildings, other trees and plants, together with people, animals, and insects, all influence the tree's overall health and prospects for growth. Similarly, a school's climate, which is influenced by its immediate physical surroundings, the condition of the school building itself, and other environmental influences all impact the quality of teaching and learning going on each day. Finally, the appearance of the oak tree from the distance—its image—provides one with a decent understanding of its overall health and viability.

Ultimately, the root system, largely invisible to the naked eye, is vital to the growth of our oak tree. Similarly, a school's identity, often implicit below the surface of a school's daily function, dictates the vitality and success of student learning. Though a tree is biased toward upward and outward growth, the tree is also in constant response to its environment. During a drought, the roots may not be able to gather enough water to supply the leaves with sufficient hydration, which could result in a year of stunted growth. Similarly, a school's identity must buffer the vitality of the school and its shared aspirations toward student success in face of a changing climate of new policies and expectations.

What separates identity from culture in this metaphor is that once the importance of the root system is known, action can be taken to ensure it becomes healthy. Once we recognize the presence of its massive root system keeping the tree upright and stable, even in the worst conditions, we can see that root system expressed in the balance and girth of the trunk, the network of branches, and a full body of leaves. In a similar frame, once we make it explicit and known, we see a school's identity in its culture, structures, the learning experiences in the classroom, and the resulting success of students. If we haven't brought the root system to light, it won't be front and center in our consciousness when we consider the health of an oak tree. The work to make a school's identity explicit, felt, and understood is an important early step in the work toward school change.



We present these definitions and the oak tree metaphor to ensure our readers understand the differences and similarities between identity, culture, climate, and image/brand. As the metaphor illustrates, each of these concepts are important in their own right, but we have chosen to focus on identity for three main reasons. First, as demonstrated above, identity must be considered separately because it centers on specific attributes that students, educators, and other stakeholders can specifically name, define, and, most importantly, exemplify in their daily actions and behavior. In understanding this entire concept, it is critical to differentiate identity from image/brand. As Spillane et al. (2019) note,

> An organization's identity differs from an organization's image, which refers to how organizational members believe others view the organization. It also differs from organizational brand, or the image of the organization that managers present to stakeholders and the public writ large (p. 852).

Ideally, though, a school's image and brand should be an authentic expression of its identity. As Bartel, Baldi, and Dukerich (2016) argue,

> stakeholders' decision to pursue a relationship with an organization often begins with their initial impressions of the organizational identity. Organizations, therefore, need to translate their internally held organizational identity into an intended organizational image that external stakeholders will likely find attractive (p. 486).

When looking at how these concepts transfer to public education, we have found that image and brand should be an ideal expression of identity and can often be the deciding factor in parents' choice regarding the school to which they will send their child. Linked back to the Oak Tree metaphor, the appearance of a tree from a distance, its image, provides one with a decent understanding of its overall health and viability.

Second, identity can also serve as the impetus for a strong school culture and climate by defining the attributes that students and educators are expected to exemplify. Crucially, the key attributes of a school's identity can easily be named and defined (and changed if necessary; Kreiner & Murphy, 2016). Since these identity attributes can be named and defined, engaging in identity work can result in tangible products, or statements of identity (e.g., explicit value and belief statement, vision for readiness). The statements alone are only claims of identity when they are not followed up with and supported by intentional structures that uphold their value. As Deming (2007) states, "a change in artifacts, even values and beliefs, is seen as superficial cultural change" (p. 81). New statements or words on a wall are meaningless unless put into action.

Changing culture requires the "modification of deep taken-for-granted assumptions and understandings," which often exist beneath the surface in schools (Deming, 2007, p. 83; Wheatley, 2001). When the key attributes of a school's identity are built upon a shared set of values, beliefs, and mental models that stakeholders consistently embody in their daily work and interactions, it can create clear expectations for what norms, behaviors, attitudes, and practices are deemed acceptable. As clear expectations lead to behavioral change across time, it becomes possible to shift the deep seated assumptions and ways of seeing the world that significantly influence culture and climate. When an oak tree appears unhealthy up close, its trunk may appear damaged and some of its branches may be barren. The culprit is not always obvious or able to be seen at the surface level. For example, the oak tree could have an unhealthy root system that may not be able

to gather enough water to supply the leaves with sufficient hydration, which could result in a year of stunted growth. Or, perhaps the air quality surrounding the tree is poor.

As we prove here and throughout subsequent briefs, the types of behavioral change that schools change requires can be triggered when statements of identity, such as a shared vision for readiness, are explicitly used to guide everyday school leadership decision-making. School leaders can help bring a school's identity alive by aligning organizational structures and learning approaches to a shared vision for readiness, which again, should be an authentic expression of its identity. When a school's identity is used consistently by school leaders to address issues of organizational structure and learning approaches it can serve as a natural leverage point for changing culture and climate. If a school's identity is not addressed, we argue it can contribute to poor culture and climate.

Identity work is especially important in public schools. The identity of public schools is all too often defined externally by the metrics used to hold them accountable, resulting in a crude dichotomy of "good" or "bad" schools. Often tied to these metrics, several websites, such as GreatSchools.com and Realtor.com, post school ratings using crude 0-10 scales. The identity of public schools is also often defined by simplistic and superficial measures like location (e.g., an "inner-city" or "suburban" or "rural" school). Identity work can help public schools seize control of the public narrative by defining who they are and where they want to go for themselves. Below we explore how shared values, beliefs, and mental models make up the foundation of a school's identity and also how other factors can influence and threaten a school's identity.

Diving Deeper into School Identity

A commonly accepted definition of identity are those attributes of an organization that are central, distinctive, and enduring (Albert & Whetten, 1985). Unfortunately--based on our school-level expertise in and around high schools--the central, distinctive, and enduring attributes of a school are rarely made explicit nor shared across stakeholders. This is partly because the key attributes of identity are based on individuals' values, beliefs, and mental models, which are "abstract, complex, and/or highly subjective" (Bartel et al., 2016, p. 482). For example, many school's claim to value creativity, but how creativity is defined, what creativity looks like inside and outside the classroom, and how parents and teachers can support students in being creative is often left up to the imagination.

Values, beliefs, and mental models. Because of the subjectivity inherent to these constructs, it is not surprising that Margaret Wheatley (2001) argues schools "do not arise from a core of shared beliefs about the purpose of public education." (p. XX). The result is a situation where stakeholders "co-inhabit the same organizational and community space without weaving together mutually sustaining relationships" (Wheatley, 2001, Para. 14–15). Wheatley (2001) also found, instead, that stakeholders in these circumstances develop self-protecting behaviors and use their political position to get what they want. Schools will only change in systemic and sustainable ways when stakeholders work in concert with school leaders to surface shared values and beliefs (Wheatley, 2001). Only then is it possible to develop "a coherent image of the organizational identity—the goals, values, and interests that define the organization and enable members to act with order and purpose" (Bartel et al., 2016, p. 484).

Shared values and beliefs vary widely among stakeholders and across communities. Common examples of shared values we see in our work with schools include but are not limited to creativity, critical thinking, curiosity, empathy, empowerment, engagement, equity, growth mindset, inquiry, innovation, motivation, and resiliency. Common beliefs include but are not limited to believing all students can learn and be successful, all students have unique assets and strengths, and that when schools partner with and listen to the communities they serve, they can dismantle inequitable structures and improve outcomes for historically marginalized groups of students. Additionally, values and beliefs are heavily influenced by the way people see, understand, and make sense of the world (Senge et al., 2012).

Peter Senge and his colleagues (2012) argue that mental models—"the images, assumptions, and stories that we carry in our minds of ourselves, other people, institutions, and every aspect of the world"—significantly influence individuals' values and beliefs as well as their attitudes and behaviors (p. 99). We argue that mental models are surfaced frequently, but rarely with explicit awareness from school leaders and teachers, making changing attitudes and behaviors difficult. For example, when a school leadership team focuses most of its time identifying poor performers on tests, that suggests a certain mental model or common mindset about what is most important and how to support the improvement of those students through basic numeracy and literacy skills. A more holistic mental model about how to support students is evidenced, for instance, when a school leadership team or school faculty places the name of every student on the wall and identifies any student that no one on the faculty knows or has a relationship with, and makes it a point to spend time with that student so that students feel included and as if they have a community who cares and supports them. The different mental models about supporting students can be seen in these two contrasting examples as starting with a judgment about student's basic academic skills as measured by tests or by starting with adult-student relationships and ensuring every student is known by name, face, and need. Revealing the different mental models held by stakeholders represents a significant step toward developing a shared vision for readiness that can guide the collective work of students, parents, teachers, and school leaders.



Other factors that can influence a school's identity. Taken together, shared values, beliefs, and mental models make up the foundation of a school's identity. It is important to note, however, that factors outside of shared values, beliefs, and mental models can exert significant

influence on a school's identity, especially if not addressed. Gioia and Hamilton (2016) describe the three main theoretical lenses used to frame these influences, including the ***social actor, social construction,*** and ***institutional*** perspectives. In the social actor and social construction perspectives, organizational identity is generated collectively by the members of the organization itself—the shared values, beliefs, and mental models that are central, distinctive, and enduring. At the local level, the "traditions" and "histories" that alumni, staff, and other community members carry with them can have a profound, enduring influence on a school's identity. For example, as the demographic makeup of a school changes across time, what is valued by the broader community may change in ways that challenge the enduring attributes that are held closely by alumni and long-serving staff.

In the ***institutional perspective***, "organizational identity is still internally determined," "but because organizations are embedded in broader social contexts, identity is highly influenced by strong external forces" (Gioia & Hamilton, 2016, p. 26). Public schools are fundamentally situated in the broader social context in which they reside, making them highly susceptible to external forces. Our research and findings show that a critical responsibility of school leaders is to address how these external forces influence a school's identity and the image seen by external stakeholders. When these forces and perceptions are not addressed or directly challenged they can threaten a school's identity and have a negative influence on culture and climate. Ultimately, school leaders are responsible for understanding, calling out, and framing a response to the various forces that are threatening the shared identity of the school.

Potential threats to a school's identity. Threats to identity can be internal events (e.g., scandals, changes in leadership), external events (e.g., new state policies, negative media coverage), or ongoing changes to the overall environment (e.g., economic recessions, changing school demographics). Those events and changes cause all or some stakeholders to question the central, enduring, and distinctive attributes of their school's identity (Petriglieri & Devine, 2016). Emerging educational research suggests public schools are facing many of the external and ongoing environmental threats described above (Neumerski & Cohen, 2019). For example, the standards and accountability movement, now well into its fourth decade, has put immense pressure on schools to improve student academic outcomes, generally, and close opportunity gaps between low and high-performing students on traditional academic metrics. Along with these pressures, the consequences of school failure have continued to intensify. School systems that are persistently failing to serve their students, based primarily on traditional academic outcomes, are often subject to state sanctions—including possible state takeover, conversion to a charter school, or outright closure. The stigma of being labeled as "failing" or "underperforming" can also result in the loss of students who transfer to neighboring public, charter, and private schools. While school closures pose an immediate risk to school-based personnel (e.g., administrators, teachers, maintenance staff) and their careers, school closures can also have lasting impacts on the students and communities they were built to serve (Deeds & Pattilo, 2015). When the response (whether required by law or not) to these pressures and sanctions is to redesign school systems, it can fundamentally alter the central, enduring, and distinctive attributes of a school's identity. Even if sanctions are not that intense, the constant threat posed by label of failing or underperforming and accompanying negative publicity will stymie the development of a positive shared identity for a school.

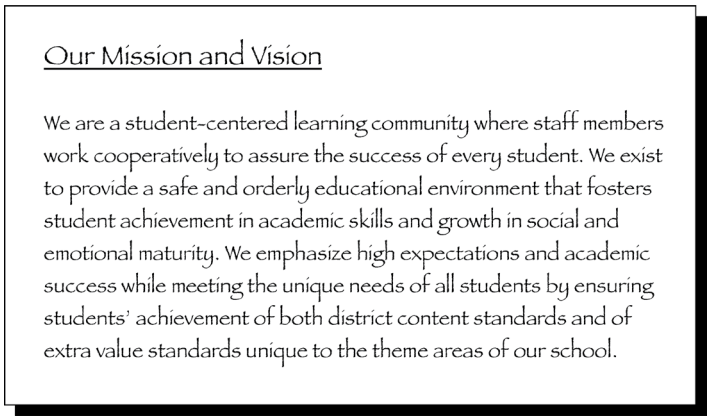
Ongoing societal, economic, and political changes are also significantly altering the demographic makeup of schools and the needs of individual students (Neumerski & Cohen, 2019). Income

inequality continues to rise across the United States, leading to increased income segregation in public schools with some schools serving more and more students from socioeconomically marginalized backgrounds (Owens, Reardon, & Jencks, 2016). The arrival of immigrants and refugees from Central America and elsewhere in the world has increased the number of students who need English language instructional support while also increasing diversity in U.S. schools. Access to adequate health care and other social services is also declining, putting enormous pressure on schools to provide wraparound support for students. Simply put, public school educators are needing to serve more culturally and racially diverse students while at the same time being asked to provide students with much more than simple academic instruction (Pew Research Center, 2007). These changes exert pressure on schools to adapt their beliefs and mental models.

Educational researchers Christine Neumerski and David Cohen (2019) capture the culminating effect of these external and ongoing environmental threats in their article on what is at the "heart of the matter," the concept of school identity (p. 882). Neumerski and Cohen found something unexpected in their large-scale study on how environmental influences, which include the pressures and changes mentioned above, influence the organizational structures and learning approaches employed by different types of school systems. The authors hypothesized these environmental influences would have an effect on decisions surrounding school structures and instruction, but not in how educators would frame the situation before them:

> What we did not expect was that they would describe another critical element to their work in systems: They perceived the identity of their school systems as changing. Leaders across systems asked, "Who are we? What does it mean for us to be a school system?" For some leaders, this question had a sense of urgency, suggesting a crisis of identity. For others, this question was embedded in a desire to redesign their school system (p. 883).

Unfortunately, organizations, including schools, "often fail to respond adequately to identity threats" (Petriglieri & Devine, 2016, p. 252). One reason for failing to respond adequately, if at all, is because not all stakeholders may view an event or an ongoing environmental change as threatening to their school's identity. Indeed, opinions differ, often fiercely, on whether issues such as accountability and school choice are beneficial or detrimental education policies. However, we argue that schools often fail to respond to potential threats because they do not have a solid sense of who they are or what they want to achieve for all students. In other words, schools often lack a shared identity. And if they do have a solid identity built on shared values, beliefs, and mental models, that identity is often not made explicit to all stakeholders.



The Need to Develop and Communicate a Shared Identity

> While the idea that members share a single unified identity is common, empirical research has demonstrated that such a uniformly agreed-on perception is rare. Instead, members hold different, albeit related and overlapping, perceptions of their organization's identity (Petriglieri & Devine, 2016, p. 240).

Schools are likely to have multiple identities, which could be oppositional, complementary, or just different (Pratt, 2016). Multiple identities will likely emerge in large organizations, such as large comprehensive high schools, where teachers are generally responsible for only one content area and are often siloed within a lone academic department (e.g., math, science, special education). Across time, these academic departments naturally develop unique identities with different shared values and beliefs around teaching and learning. Often, academic departments also have different ideas, or mental models, about what knowledge, skills, and support students need to be successful after high school. We also find that there is very little communication or collaboration across departments.

School leaders have four main options for addressing problematic issues that can arise from multiple identities: compartmentalizing different academic departments, removing individuals who do not represent the school's overarching identity, aggregating multiple identities under one unifying umbrella, or integrating multiple identities to create a new identity (Pratt, 2016). Organizational theory, and the realities of public education suggest that integrating multiple identities is the preferred approach for schools because resources are scarce, and, when closely examined, the existing identities within schools are often more complementary than oppositional. The most rational and efficient option for school leaders with multiple identities under one school roof is to engage in a process that brings together a representative group of stakeholders to generate a shared identity that creates explicit linkages among different individuals, groups, and departments. As we describe in the following section, stakeholder engagement of this variety can also help bridge the gap that frequently exists between a school and the community it serves.

In our work, we have observed that public schools encounter many factors that influence its identity, including a lack of shared values, beliefs, and mental models; internal and external forces (e.g., policy pressures and demographic changes); and the existence of multiple identities. Schools, alongside the communities that they serve, can counter these factors by developing a shared identity that creates connections between different internal and external stakeholders. However, for these actions to be effective, schools must ensure that whatever shared identity is created truly represents its students and the communities they come from.

The Misalignment of School and Community Identity

In general, we find that schools usually have an identity that is seen, heard, and/or felt by the community it serves. In schools that serve communities of Color, there is often a misalignment of identity between the school and community being served (Battistich, Solomon, Watson, & Schaps, 1997; Schaps & Solomon, 1990). The U.S. public school system has been built on narrow definitions of values related to teaching, learning, and achievement that represent Eurocentric values and perspectives. That antiquated foundation and the persistent structural racism and inequities

experienced by many communities of Color often result in a school identity that fails to account for a myriad of assets, strengths, and gifts of its diverse students and surrounding community. In other words, most schools are built on system values and structures that are not designed to incorporate or celebrate the unique characteristics and capital of non-White and/or non-middle and upper class community members (Gillborn, 2005; 2014). As schools follow the national demographic shifts, becoming less middle class and White, the misalignment between school and community identity is becoming more pronounced.

In many circumstances, the consequences of misaligned school identities have been severe. In a wide-ranging literature review on "How People Learn," the National Academies of Sciences, Engineering, and Medicine asserted, "A significant factor in school failure may be a mismatch between the socialization practices a student experiences at home and what and how they are taught in school" (2018, p. 72). For example, imagine a school where White-Eurocentric cultural norms dominate teaching and learning practices, but the student body is primarily made up of students of Color. When the non-White cultural norms are ignored, opportunities for misalignment will exist and become exacerbated at multiple levels of the student experience. Teachers may be unaware of the degree of relevance of the examples they use on tests, the type of languages students use in and out of class, or the various "funds" of knowledge and intuitions that students of Color carry from their home, family, traditions, cultural practices, and neighborhoods (Moll, Amanti, Neff, & Gonzalez, 1992). One example comes from the different ways stories are told, such as topic-associative style, common in African-American communities, where segments of the story are connected by the narrator's own internal point of view, as compared to the more linear style of story-telling common in schools where segments of the story follow a sequential order tied to an overall theme or topic (Flood, Heath, & Lapp, 2005).

> For example, story-telling is a language skill. Topic-associative oral styles have been observed among African American children (Michaels, 1981a,b; 1986). In contrast, white children use a more linear narrative style that more closely approximates the linear expository style of writing and speaking that schools teach (see Gee, 1989; Taylor and Lee, 1987; Cazden et al., 1985; Lee and Slaughter-Defoe, 1995). Judgments may be made by white and black teachers as they listen to these two language styles: white teachers find the topic-associative stories hard to follow and are much more likely to infer that the narrator is a low-achieving student; black teachers are more likely to positively evaluate the topic-associative style (Cazden, 1988:17)" (National Academies of Sciences, Engineering, and Medicine, 2018, p. 73).

When this misalignment is not identified, any disengagement or underperformance from students of Color is often misdiagnosed as resistance or a lack of motivation (National Academies of Sciences, Engineering, and Medicine, 2018). In the worst circumstances, teachers make false determinations about students' intelligence and academic potential rather than seeing the cause of the problem as a lack of alignment between how they are teaching and how students were raised to learn or how learning takes place throughout their community. In some cases, disengagement may be a proactive and protective measure to avoid environments that make a student feel devalued and identity threatened (Gray, Hope, & Matthews, 2018).

This idea that school systems are failing to embrace the assets of their communities has been well vetted in research (Valenzuela, 1999; Yosso, 2005). Yosso's work (2005) raises awareness of how frequently schools ask young people, especially Black and Brown students, to check their

individual identities at the school door. Given how much those identities encompass students' many strengths and abilities, this persistent issue handicaps students of Color, compromising their confidence and engagement in school. It is critical to point out the racism and discrimination that has historically served as a hindrance to an authentic sense of self for diverse students. The typical infrastructure that defines primary and secondary education in the United States has evolved very little over the past 150 years and most public schools are still organized in a way that impedes students' individual identities, especially for students of Color (Love, 2004). In recent years, across the United States, racism and discrimination are on the rise, and schools are not immune to these trends (Kohli, Pizarro, & Nevárez, 2017). To counter these trends and develop school identities that authentically reflect their communities, education leaders must continuously engage stakeholders— including students, families, and educators.

Using Stakeholder Engagement to Improve Identity Alignment

We argue stakeholder engagement is perhaps the most effective way of bringing a school's identity into alignment with the identity of the community it serves. Stakeholder engagement also has benefits that go far beyond identity alignment. In general, effective partnerships between schools, families and communities are positively associated with students' academic and behavioral outcomes across numerous studies (see Sheldon, 2019). Engaging families and community members is also a critical component in the school change formula (Bryk, Sebring, Allensworth, Luppescu, & Easton, 2010) and is a common characteristic of high-performing schools, regardless of the socioeconomic status of the student body or the neighborhood in which the school resides (Teddlie & Reynolds, 2000).

There are several ways schools can facilitate stakeholder engagement, such as simply providing families with ongoing communication about school activities, encouraging volunteering and collaboration with community organizations, and involving families in the decision-making process (see Epstein et al., 2019). To be clear, these and other types of stakeholder engagements can all help bridge the gap between families and educators to promote greater alignment between school and community identities. This brief focuses on involving stakeholders in the decision-making processes as a way to generate tangible statements of identity, such as a shared vision for readiness. Schools take a significant step toward creating culturally responsive learning approaches when they embrace and leverage the assets of their communities to create a shared vision for readiness (Sanders & Galindo, 2014). Below we describe stakeholder engagement processes meant to generate a shared vision for readiness that is anchored in the key attributes of a school's identity.



SHARED VISION FOR READINESS

We have found that a shared vision for readiness is the most useful, tangible, and authentic statement of a school's identity. Watkiss and Ann Glynn (2016) note the importance of products, like shared statements of aims and goals, to provide meaning to an organization's identity.

> Organizational products, as a public form of organizational artifact, provide a key link between the internal and external stakeholders regarding an organization's identity. As such, artifacts act as a cognitive anchor in giving meaning to the organization's identity in different and unique ways" (emphasis added; p. 320-321).

These statements of identity can also include a description of shared values and beliefs or a postsecondary readiness definition. Although all statements of identity are worthwhile topics, we focus exclusively on a shared vision for readiness, which can be an invaluable tool for guiding schools through large-scale change efforts with cohesion and shared purpose.



As a reminder of the importance of a shared vision for readiness, we point readers to the second half of Albert et al.'s (2000) simple definition of identity, what a school "stands for and where it intends to go" (emphasis added; p. 13). A school's identity and its vision for readiness should be intrinsically linked. We stress, should be, because we also know that a common obstacle to achieving and sustaining school change is what Cohen et al. (2017) refer to as lack of "consensus on outcomes," the specific knowledge and skills schools want all students to graduate with (p. 204). We surmise that one underlying barrier to a shared sense of identity, specific to large high schools, is the fact that each department may have its own distinct vision for student readiness. When a clear, concise, and compelling vision for readiness is created and shared across a school it

can be used by administrators, teachers, students, parents, and other stakeholders to constantly ask questions such as, Is this who we are? Does this align with what we are trying to achieve for all students? Below we begin by presenting research supporting the importance of shared visions. We then discuss how a school's vision for readiness should be

- representative of all stakeholder groups;
- connected to the instructional core;
- inclusive of transformative concepts that promote educational equity;
- consider the value of college, career, and life readiness; and
- communicated widely both internally and externally.

We end by briefly discussing how setting the two anchors for school change—a school's identity and its vision for readiness—can guide school leader decision-making. Using a school's identity and its vision for readiness to inform alignment of organizational structures and learning approaches are the topics of subsequent briefs in this series. In short, once these two anchors are set, schools can develop long-term, incremental plans for school change with a specific focus on improving equity by dismantling inequitable structures and employing universal learning approaches that tap the unique assets and strengths of all students.

What the Evidence Says about Shared Visions

A common finding across organizational theory (e.g., Senge et al., 2012) and educational research (e.g., Leithwood, Harris, & Hopkins, 2008) is that developing a shared vision is a prerequisite for continuous improvement. For example, in a synthesis of the evidence, Leithwood et al. (2008) put forth seven strong claims about successful school leadership. The authors claim that "building vision and setting directions" is one of four types of practices common to successful school leaders (p. 29). The authors argue effective vision building can motivate stakeholders, clarify roles and goals, and guide strategic planning. Similarly, developing a shared vision for readiness is critically important for addressing and combating the potential threats to identity referenced earlier in this brief. Cohen et al. (2017) take up this issue when they highlight a key dilemma facing public schools—how to develop coherent systems when faced with an educational policy arena defined by standards, accountability, and market-based policies (e.g., school choice, charter schools). The authors stress schools need to reach a consensus (i.e., a shared vision) among stakeholders on the outcomes they will pursue as a system to effectively channel these pressures.

There is an important distinction between a general "shared vision", the type of vision educators are accustomed to, and a "shared vision for readiness." The former tends to include generic statements such as "Our Vision is to Graduate Students Ready for the 21st Century" or "Our Vision is to Inspire Lifelong Learners." A shared vision for readiness, on the other hand, should include specific, yet simple language that describes the knowledge and skills the school and its community aims to equip students with so they are ready to be successful when they graduate high school. Our research and experience also suggest that visions for readiness be tethered to the reality of teaching and learning in the classroom, promote educational equity, and balance college and career readiness. Ultimately, we find most visions contain these characteristics when school leaders take care to meaningfully engage a representative group of stakeholders to develop a vision.

Processes for Developing and Communicating a Shared Vision for Readiness

There is no one right way to develop a shared vision for readiness that is grounded in a school's identity. That said, there are several essential processes that school leaders can institute to ensure visions are representative of its identity. First and foremost, stakeholders, including students, parents, teachers, administrators, and community members must be invited to both provide input and participate in the process of generating a shared vision. A common problem is that too often students and parents are invited to provide input via a survey or listening session, which limits authentic involvement and a sense of ownership in the process. By involvement, we mean stakeholders are part of an active co-creation process with school staff that results in information used to generate a shared vision for readiness.



These types of co-creation processes can be structured in numerous ways. What is key is that the goal of the process (e.g., generating a shared vision for readiness) is clear, that participants understand the current school and community context, and that other key considerations related to preparing students for life after high school, are central to the process. From there, unearthing the participants' values, beliefs, and mental models is critical to identifying commonalities and shared understandings. Finally, having participants envision a future for their students and school is crucial for developing a shared mental model of readiness. These ingredients can then be used to create a draft vision statement.

Ideally, many stakeholders, who all hold different views of the world, contribute to the information used to create a draft vision statement. Because not everyone's views will be represented in the draft vision statement, it becomes necessary to solicit feedback on whether the draft is acceptable and responsive to different groups of individuals. Since it is not always feasible to reconvene a large group of stakeholders, one approach is to identify leaders of different groups of individuals that can serve in a smaller group who vet the draft vision statement and provide recommendations for potential revisions. This method also ensures school leaders are held accountable for developing a draft vision statement that speaks to as many voices as feasible and appropriate.

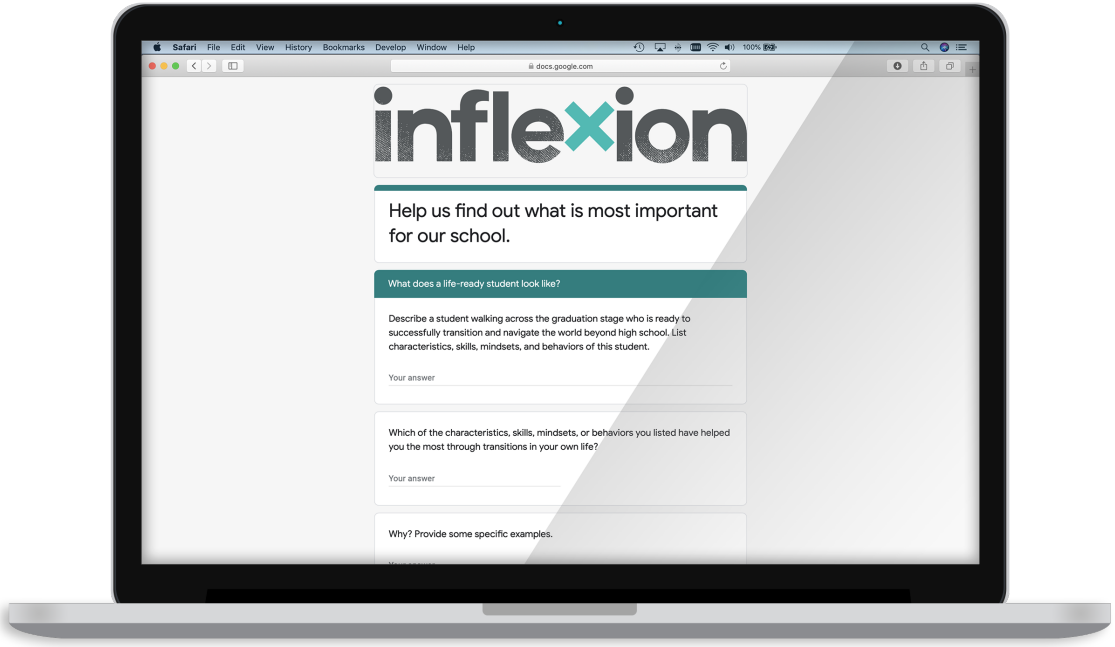
Ensuring representativeness and minimizing power differentials. In terms of both input and participation, schools must work to secure a representative group of participants. In

particular, research shows certain groups of individuals are less likely to participate in stakeholder engagement. Epstein et al. (2019) summarize this research below.

> "Single parents, parents who are employed outside the home, parents who live far from school, fathers, parents with diverse cultural and linguistic backgrounds, and those without easy access to new technologies are less involved at the school building, on average, unless the school organizes opportunities for families to become involved at various times and in various places to support the school and their students. These parents may be as involved as other parents with their children at home" (p. 15).

Simply sending out invitations to provide input or participate in a school-based event is not enough (Epstein et al., 2019). If schools take an equitable approach, they make intentional efforts and investments to reach those stakeholders they know are less likely to engage with school staff. As Kose (2011) notes, exemplary principals who incorporate explicit discussions around transformative concepts into a school's vision explicitly sought the inclusion of traditionally marginalized stakeholders during the vision development process.

There are several ways to solicit input and encourage involvement. A structured survey is one method for gathering input from many individuals and groups of people. However, we find in our work that response rates for stakeholder-specific surveys are generally far lower than schools want or expect. Interviews, focus groups, and structured meetings are additional methods for gathering information from stakeholders. However, when seeking authentic stakeholder engagement, simply providing access to involvement alone is not sufficient to ensure a collective shared vision for readiness is created (Carreón, Drake, & Barton, 2005). A representative group of stakeholders must be involved in the process of generating a shared vision for readiness, and as we asserted above, schools must put in place systems explicitly designed to ensure that dominant perspectives do not overpower the input and voice of historically marginalized groups of people (Hand, Penuel, & Gutiérrez, 2013).





When privilege and power dynamics are not identified and managed, soliciting input can turn into a symbolic exercise rather than an authentic process that leads to a shared vision for readiness representative of the school and its community. Unfortunately, as many educators know, shared visions are not always developed in partnership with students, parents, and other members of the community. When input from these stakeholders is solicited, it is sometimes done with a compliance mindset, and rarely represents the participants assessed. For example, California's Local Control Funding Formula requires all districts to engage stakeholders on an annual basis to develop goals and associated strategies that are documented in Local Control Accountability Plans. A study that included multi-year case studies of districts, a survey of California district superintendents, and public opinion polls found the "majority of districts demonstrated shallow forms of engagement". Additionally, research has shown that districts and schools often experience "widespread struggles to attract participation, particularly among traditionally underserved stakeholders" (Marsh et al., 2018, pp. 2-3).

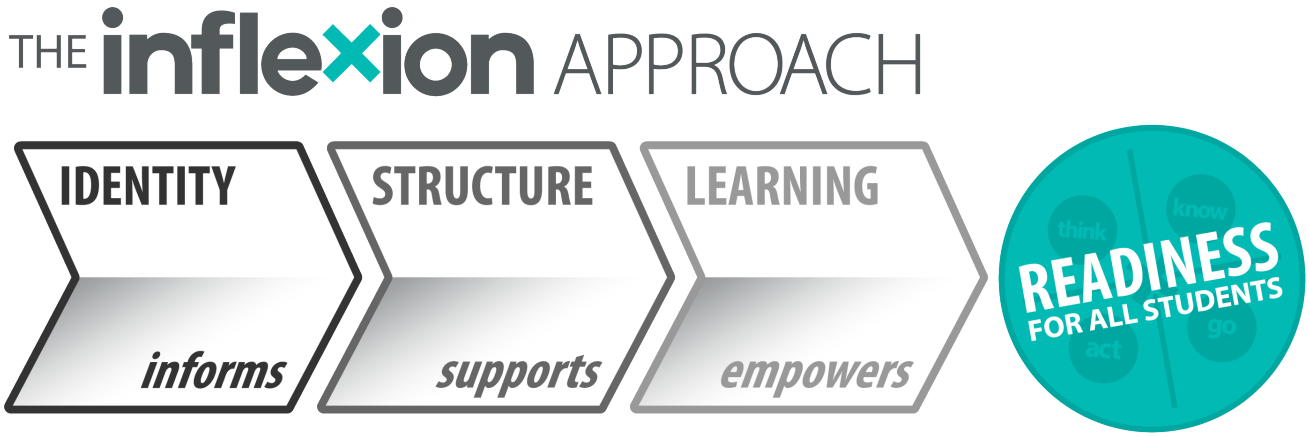
Surface level stakeholder engagement diminishes the power of shared visions for generating a mutual understanding of purpose and commitment from parents, students, and the broader community (Senge et al., 2012). When district and school leaders fail to meaningfully engage a representative group of stakeholders, they often revert back to the default option and create the vision by themselves or with a small group of leaders that may or may not include teachers. Senge et al. illustrates the problematic nature of this behavior.

> One might assume that "vision" is solely the top leader's job. In schools, the "vision" task generally falls to the superintendent, the principal, and the school board. Within a classroom, it may fall to a teacher. But visions based on authority are not sustainable. They may succeed in carrying a school or school system through a crisis…But when the crisis is over, people will fall apart, back to their fractionalized and desperate hopes and dreams (p. 87).

This does not mean school leaders should take a completely hands-off approach. Rather, it is the job of school leaders to translate the information provided by stakeholders into a vision for readiness that is not so broad that it is meaningless, but also not too detailed that it is unmemorable. School leaders are also best positioned to understand how to connect their vision to the school's instructional core.

Connecting visions to the instructional core. As Senge et al. (2012) states, shared visions should be based in the current reality, clearly articulate future aspirations, and provide a path for moving forward. One way to do this is to connect the vision to the instructional core. In their book on creating the conditions necessary for continuous school improvement, Forman, Stosich, and Bocala (2018) argue connecting a vision to the instructional core (i.e., students, teachers, content)

marks the beginning of the improvement cycle. The authors maintain that to be effective, visions must go beyond articulating desired student outcomes to also provide clarity about the role of teachers and content in achieving success. To realize their vision, school leaders must also build corresponding "structures and conditions to foster professional development and collaboration" (p. 62). The result of connecting a vision to the instructional core and making corresponding organizational structural changes is a more coherent organization that slowly eliminates the compartmentalization and multiple identities that are typically found in large public schools. The Inflexion Approach, illustrated below, centers around these ideas and relationships.



Including transformative concepts to promote educational equity. School leaders also should work to translate information from stakeholders into transformative concepts for improving educational equity. Kose (2011) used interviews with 15 principals--identified by their colleagues as leading for equity--to determine the practices that enable the development of transformative school visions. Transformative leadership entails helping stakeholders understand and ultimately address issues related to equity, social justice, diversity, and oppression. Kose found these exemplary principals incorporated explicit discussions around transformative concepts and sought the inclusion of traditionally marginalized stakeholders during the vision development process. The content of the vision statements and the focus on transformative concepts, in particular, depended on the existing context, including the history of the school, the power dynamics between different stakeholders, and the level of support or resistance among stakeholders. Regardless of the content, vision statements became an important vehicle for facilitating transformative leadership.

Considering the value college, career, and life readiness. Given the heavy emphasis on traditional metrics in measuring student achievement to evaluate school quality and college admissions processes, it comes as no surprise that schools focus so intently on improving standardized test score performance. This inequitable focus on traditional academic metrics has created a false sense of readiness and has also highlighted why balancing college, career, and life readiness becomes so important in vision for readiness statements. Speaking to a holistic set of knowledge and skills is likely to be more representative of a school's identity and sends a signal to stakeholders that the school values the whole child versus exclusively valuing traditional academic content and performance outcomes. Further combating this content-driven idea of readiness and success, a steady stream of research during the past decade has shown that students need much more than proficiency in numeracy and literacy to be successful after high school (Conley, 2014; Farrington et al., 2012; Jones & Kahn, 2017; National Academies of Science, Engineering, and

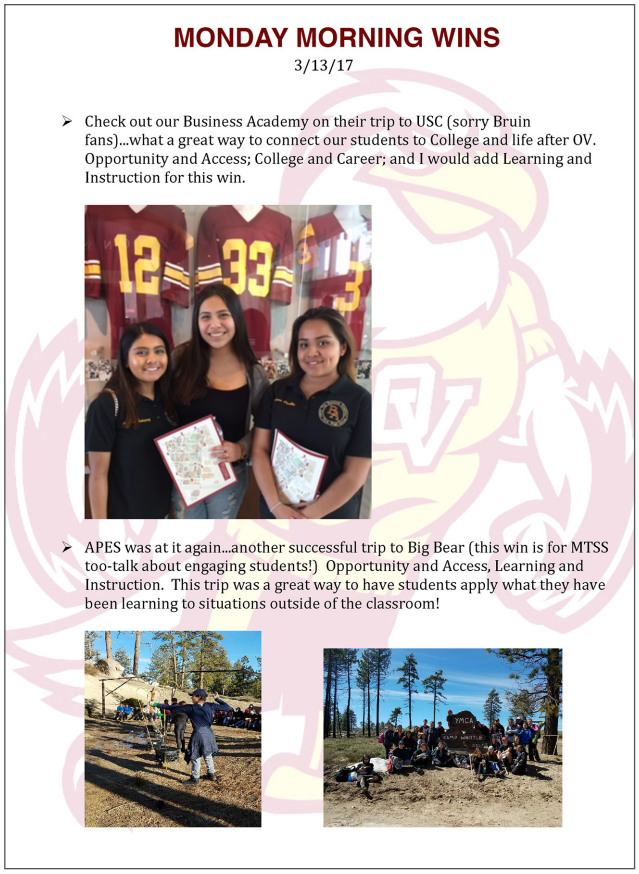
Medicine, 2018; National Research Council, 2012). This research shows students' interpersonal, intrapersonal, and metacognitive skills; social-emotional well-being; mental and physical health; and general postsecondary transitional skills are just as, if not more, important to their success after high school as academic content knowledge.

One model for categorizing the different knowledge and skills that stakeholders value is the ***Four Keys to College and Career Readiness***. David Conley, Inflexion's (formerly the Educational Policy Improvement Center) founder and former CEO, developed the ***Four Keys*** framework based on research exploring the types of knowledge and skills students need to be successful in postsecondary education. ***Key cognitive strategies*** refer to the "ways of thinking that are necessary for postsecondary-level work," with a strong focus on research-related skills (p. 55). ***Key content knowledge*** are the core concepts and big ideas that define subject areas as well as the technical knowledge and skills needed for specific career pathways. ***Key learning skills and techniques*** include two categories: student ownership of learning (e.g., goal-setting, self-awareness, persistence) and learning techniques (e.g., time management and strategic reading). Finally, ***key transition knowledge and skills*** includes "information that is not equally accessible to all students," especially for "families and communities historically underrepresented in higher education" (p. 56). Key transition knowledge and skills include, but are not limited to, college admission requirements, financial aid policies, career pathway information, and postsecondary institutional norms and expectations. The Four Keys is a framework that can be used to help ensure a balanced approach to college, career, and life readiness—i.e., how students think, know, act, and go.

Communicating a school's vision to reinforce its identity. Once "organizations began changing their organizational identity claims, the next step is to communicate this change to stakeholders" (Bhatt, Van Riel, & Baumann, 2016, p. 444). In other words, once a school adopts a formal vision for readiness, a critical next step is to begin communicating that vision in a way that reinforces the school's identity. This is especially important given the high likelihood of multiple identities operating within public schools and the historical disconnect between schools and communities.

To help communicate an organization's identity, Schinoff, Rogers, and Corley (2016) argue for ***identity custodians***. Identity custodians are individuals who convey messages related to an organization's identity using three primary methods: ***saying, showing,*** or ***staging***. Perhaps the most common way of communicating a school's identity is by ***saying***, which includes individual conversations, mass emails, and other forms of direct communication with internal and external stakeholders. A school might initially roll out its vision for readiness using a mass email to students, parents, and staff. Ideally, this email would also illustrate how the vision for readiness connects to the school's shared values, beliefs, and mental models, helping demonstrate where the school is intending to go aligns with what the community wants for all students.

Showing ranges from formal and informal mentoring, the characteristics of the physical space a school resides in, images that appear on walls, and other similarly themed artifacts. A school might highlight individuals or groups that exemplify the shared values and beliefs. For example, Ocean View High School, located in Huntington Beach, California, needed a way to show school staff how the school's multi-tiered system of supports (MTSS) and First Best Instruction (FBI) looked like on the ground. The solution was something called Monday Morning Wins, a weekly newsletter that focuses on examples of how both MTSS and FBI positively influence students with explicit links to the school's shared values.



MONDAY MORNING WINS

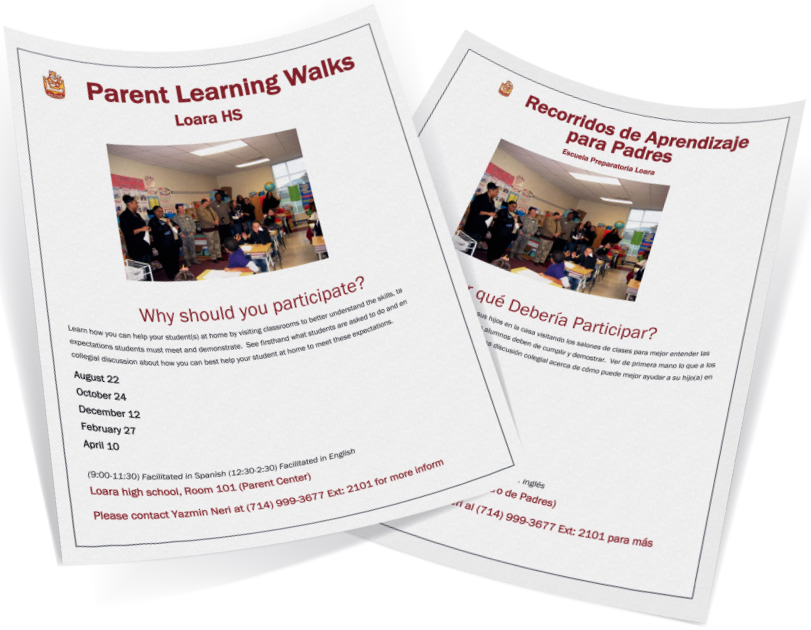
3/13/17

- Check out our Business Academy on their trip to USC (sorry Bruin fans)...what a great way to connect our students to College and life after OV. Opportunity and Access; College and Career; and I would add Learning and Instruction for this win.

- APES was at it again...another successful trip to Big Bear (this win is for MTSS too-talk about engaging students!) Opportunity and Access, Learning and Instruction. This trip was a great way to have students apply what they have been learning to situations outside of the classroom!

Finally, ***staging*** occurs when students, families, teachers, and other stakeholders are provided with opportunities to enact or experience the school's identity, either during one-time events or through rituals and routines. One example from the Anaheim Union High School District includes a routine referred to as Parent Learning Walks. In these small groups of parents, led by a staff member, parents and/or caregivers conduct a series of classroom visits to see how well the observed teaching and learning align to the district's vision for readiness; in this example, the district vision is supposed to align to the 5Cs (i.e., collaboration, communication, creativity, critical thinking, character). Beyond providing parents with an opportunity to experience first-hand what the district's vision for readiness feels like in the classroom, AUHSD explicitly designs parent learning walks as a way to build stronger connections between the school and the community it serves.

Though informal identity custodians may exist in schools, we have found that schools must be explicit about assigning specific individuals the responsibility for saying, showing, or staging--as well as identifying situations where clear identity misalignment is occurring. When identity custodians are saying, showing, or staging, they are most likely to build coherence across a school when they convey messages with high clarity and intentionality. Perhaps even more important, identity custodians should tie their messages, examples, and activities explicitly to the shared values, beliefs, and mental models that define the school's identity as a way to build awareness and understanding.



Parent Learning Walks

Loara HS

Why should you participate?

August 22
October 24
December 12
February 27
April 10

Loara high school, Room 101 (Parent Center)

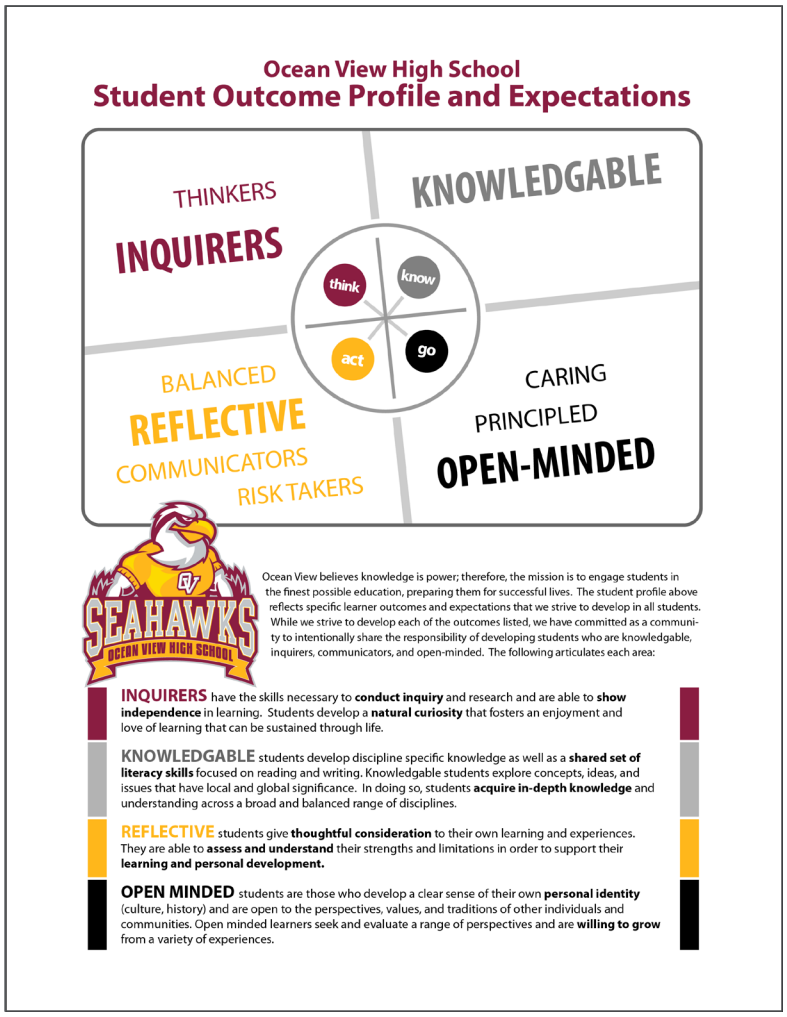
Please contact Yazmin Neri at (714) 999-3677 Ext: 2101 for more inform

Recorridos de Aprendizaje para Padres

Escuela Preparatoria Loara

qué Debería Participar?

(714) 999-3677 Ext: 2101 para más



SETTING THE ANCHORS FOR SCHOOL CHANGE

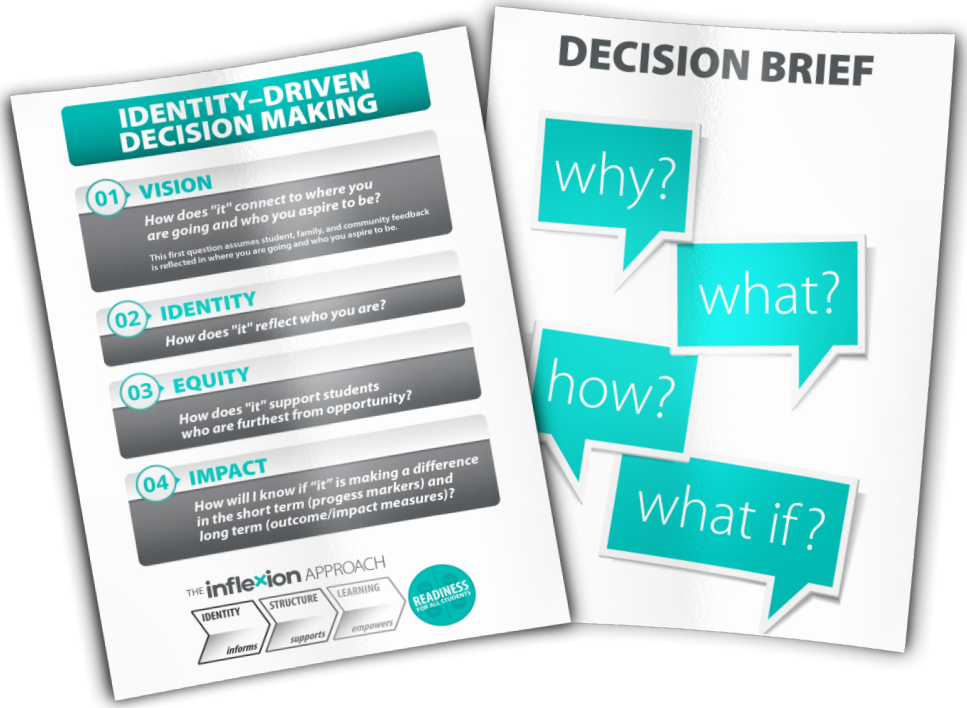
School leaders have the immense responsibility for shepherding stakeholders through a process that unearths the shared values, beliefs, and mental models that are used to create a shared vision for readiness. Furthermore, this shared vision for readiness musk speak to the core of the school's identity and serve as a bridge that closes the gap between the school and the community it serves. This is just the first step in pursuing school change. The next steps are aligning the school's organizational structure and its learning approaches to its identity and vision for readiness. This is not a small nor easy task but we have found that ***vision without execution is nothing more than a hallucination***. Unfortunately, we find that many schools do create a vision for readiness in collaboration with stakeholders, but the final draft of the vision becomes the end of the process.

To be realized, a vision for readiness must become a part of everyday decision-making by educational leaders. School leaders make hundreds of decisions during the course of any given week related to any number of issues; how these decisions align or do not align to the school's identity and its vision for readiness should be an explicit part of every decision. When decisions are informed by a vision for readiness, the school leadership works toward internal coherence—a powerful approach for promoting organizational learning and facilitating school improvement (Forman et al., 2018). Working toward internal coherence can also cement a school's identity, as Ashforth (2016) argues below:

> Finally, as stakeholders embed the organization's identity in objectives, value statements, job descriptions, hiring criteria, recurring tasks, information flows, brand names, reward systems, and so on, it becomes increasingly institutionalized…The more institutionalized the identity, the more difficult and even unthinkable major identity changes becomes. Indeed, the identity may become taken for granted, analogous to the air that stakeholders breathe, and only become salient when it's threatened or some major change is considered" (p. 83).

When school leaders continuously build internal coherence it can help staff members see how their personal identity aligns (or does not align) to their school's identity. When a member identifies "strongly with the organization, the attributes they use to define the organization also define them" (Dutton, Dukerich, & Harquail, 1994, p. 239). When the shared values, beliefs, and mental models that make up a school's identity are not clear or explicit, it becomes difficult for staff to decipher if they fit or do not fit with the school. Making a school's identity clear eliminates the guesswork and lets staff know if who they are and what they do already aligns with the

school's identity, if they need to change their behavior to align better with the school's identity, or if they need to leave the school because they do not want to adopt the school's identity. And when a school's identity informs a school's hiring practices, it is more likely staff will be hired who align with the school's core identity and where they are going. This is just one of the many ways in which identity-informed decision-making (see Figure below) can improve internal coherence.



The subsequent briefs in this series expand on this idea of coherence as it relates to structures and learning approaches. In those briefs, we provide a mental model for incremental, identity-driven change--what we refer to as ***little things, key moves,*** and ***big plays***. We have found schools have a greater chance of making changes to organizational structures and learning approaches when long-term implementation plans include the little things, key moves, and big plays needed to achieve and sustain change.

CONCLUSION

In sum, there is an immense need for schools to authentically engage their communities to develop shared values, beliefs, and mental models that become the core components of a shared identity. Bridging the gap between schools and the communities they serve is essential for organizing schools to improve in a continuous and equitable manner. Creating a shared vision for readiness that is informed by a representative school identity signifies a critical step in the improvement process. Importantly, this step cannot be ignored. School change too often centers on changing the organizational structures or learning approaches in a school. Both are necessary and both are insufficient on their own. And if those changes to structures and the learning approaches continue to lead to a situation where students and families do not see themselves in their school, these efforts and investments will continue to fall short. That is, identity and vision work are essential for setting the stage for effective structural and learning approach work. A school's identity and its vision for readiness become the anchors from which all decisions related to structures and learning approaches are made. Without those anchors, schools will continue to suffer from incoherent, sporadic, and unsustainable attempts at system-level improvement.

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b. K-5 LaHO Principal Report

ALSEA SCHOOL DISTRICT BOARD REPORT

Name: Heather Shunk **Position:** Principal

BOARD MEETING DATE: April 13, 2026

[Link for March Assembly Slides]

[Link for April School-Wide Newsletter]

March Assembly - Celebrations for birthdays, 90% or better attendance, Student of the Month, Tree House t-shirt designs, 100th Day of School, Welcoming new students, all the great learning happening in classes, students of the month, and sharing what we learned about being "**Bold**". Character trait for April: **Imaginative.** Families shared pictures of leprechaun fun and spring break adventures.









Tree House Collaboration

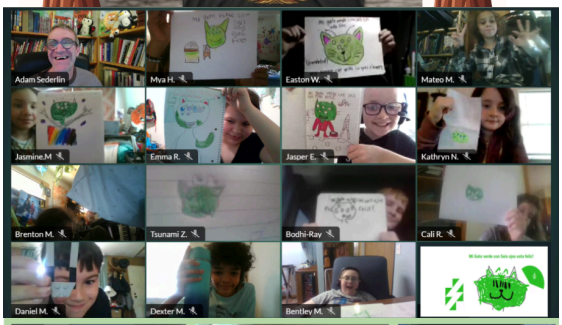
Students continue meeting in cross-grade Tree Houses to strengthen connection and community. This month, students are finalizing t-shirt designs, collaboratively selecting colors, symbols, and messaging that represent their shared identity. This work continues to build student ownership, teamwork, and school pride as they collaborate on the foundation of their "Tree House Team".

OSAS Testing (Grades 3–6)

Students are participating in OSAS English Language Arts remote assessments, including the Computer Adaptive Test (CAT) and Performance Task (PT). Students are demonstrating strong focus and perseverance, and families continue to provide valuable support for testing at home, consistent with communication shared in the April newsletter

Instruction & Student Growth

Students are building comprehension skills in Spanish through reading and discussion while also applying science concepts through hands-on projects, including dioramas to demonstrate their understanding of machines. Learning in Oregon history continues to deepen through integrated social studies work. Students are also engaging in reading challenges to build fluency and stamina, writing and publishing fictional stories to strengthen organization and creativity, and developing math vocabulary and application through targeted instruction and problem-solving activities.





Community Engagement

In April, Learn at Home Oregon is organizing an informal family meet-up at the Wooden Shoe Tulip Festival in Woodburn. This optional gathering provides an opportunity for students and families to connect in person, build relationships, and strengthen our school community. Opportunities like this support a sense of belonging and connection beyond the virtual classroom, which continues to be an important part of our program.

Upcoming Talent Show

Learn at Home Oregon is preparing for a schoolwide Talent Show in May, providing students with an opportunity to share their unique talents, creativity, and confidence with the school community. This event encourages student voice, self-expression, and participation while strengthening connection and celebration across the program.



i. Multilingual Learner/English Learner District Plan



ML/EL District Plan

ALSEA

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INTRODUCTION

The Oregon Department of Education defines education equity as the equitable implementation of policy, practices, procedures, and legislation that translates into resource allocation, educational 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.

As the number of English Learners (EL) in Oregon continues to rise, so too does their proportion within the overall student population. Over the past decade, various efforts across Oregon have focused on promoting equitable practices to provide better opportunities for students of color and multilingual learners. However, these efforts have often been fragmented, compliance-driven, and lacking the cohesive focus required for real impact. Persistent opportunity and achievement gaps in academic performance, high school graduation, and other areas underscore the need for a more aligned and sustained effort.

Communities across the state are calling for action, and we must heed that call by designing a more unified, research-driven approach to supporting EL students. The Multilingual Learner/English Learner District Plan (ML/EL District Plan) is designed to guide districts in developing a comprehensive plan that is evidence-based, aligned with the needs and priorities of Oregon's Multilingual Learners Strategic Plan and the EL Outcomes Program, and meets state and federal requirements for serving multilingual learners.

BACKGROUND

ML/EL District Plans provide evidence of compliance with OAR 581-23-100 (3)(c)(b)(4), which charges districts with the development of programs for English Learners (ELs) that meet basic U.S. Department of Education, Office for Civil Rights guidelines. ML/EL district plans address the components required by Lau v. Nichols (1974). This plan template incorporates guidance provided by the U.S. Department of Education, Office for Civil Rights and provides an opportunity to comprehensively align the articulation of basic programmatic requirements for serving students who are entitled to English Language Development support to access the general education provided, as well as the systemic improvements that are needed to evolve programs to better meet the needs of the students they intend to serve .

This plan template guides districts to describe how they meet the needs of multilingual/English learners in seven key areas:

1. Identification of Multilingual English learners
2. Instructional programming and staffing
3. Assessment and progress monitoring for current students

4. Monitoring exited students
5. Equitable program access
6. Family engagement and communication
7. Program evaluation

These plans enact the state's vision that all adults share the responsibility of contributing to educational systems that ensure multilingual students designated as English learners are valued for the rich and diverse lived experiences, languages, heritage, and cultural knowledge they carry for current and future generations, supporting all Oregon students to graduate from high school with the Oregon Seal of Biliteracy/Multiliteracy and to be college and career ready.

To reach this vision, our mission is to transform Oregon's education system, ensuring that all multilingual learners experience culturally and linguistically responsive and affirming learning environments, rigorous instructional programming, and pathways that equip them to pursue their current and postsecondary visions of success.

EL Outcomes Program (HB 3499)

The EL Outcomes Program was established through the passing of House Bill 3499 in 2015. House Bill 3499 directed the Oregon Department of Education (ODE) to develop and implement a statewide education plan for English Language Learners who are in the K-12 education system. The program addresses disparities experienced by Multilingual and English Language Learners, historical practices leading to disproportionate outcomes for students, and the educational needs of the students from K-12 education by examining culturally appropriate best practices in this state and across the nation.

Districts are identified and onboarded into an EL Outcomes Program cohort every four years based on a set of 14 Indicators within the EL District Data Profiles among other factors. Each district that is identified is notified by the EL Outcomes Program team of their designation and receives support throughout the duration of their four-year designation.

The law under ORS 336.079(5)(e) stipulates that if a school district does not meet expected growth and expected benchmarks for student progress indicators, the Agency will direct the district to expend funds under ORS 327.013(1)(c)(A)(II) (ELL weight) for up to three years.

ODE provides culturally responsive support and interventions to those identified as Transformation and Target Districts. Transformation and Target Districts receive the following:

- ODE Education Program Specialist supports
- A comprehensive needs assessment process, root cause analysis, systemic intervention identification, and action plan and budget development with support from ODE

- Improvement planning and monitoring, using state and local data
- Fiscal support for improvement plan activities
- Funding for the improvement and implementation of systems and structures towards supporting ML/EL students. The funding distribution model assigns a specific dollar amount annually to each identified Transformation and Target district. Allocations are based on a weighted funding formula.
- Participation in a Community of Practice

The ML/EL District Plan template guides districts to conduct an evaluation of their local programs and is evidence-based. ODE uses components of ML/EL district plans to conduct a comprehensive needs assessment with districts identified for improvement to identify the root causes impacting student performance, program quality, and effectiveness, as required by state rule (see OAR 581-020-0615 and OAR 581-020-0613). The completion of a comprehensive needs assessment of a district's EL program is one of the initial steps in the onboarding process of the program.

In addition to the initial comprehensive needs assessment, the onboarding process includes a root cause analysis, culturally and linguistically responsive community engagement review of data, and selection of priority indicators and systemic intervention categories.

Taken together, these activities form the basis for the planning and implementation of the district's EL Outcomes Program Action Plan and Budget. There will be an in-depth overview of all tasks and processes as well as scheduled check-ins along the way to support identified districts as they complete the plan.

ORGANIZATION OF THE TEMPLATE

This template provides a framework for districts as they develop their new or revised local EL plans. The first section, District Assurances, provides an opportunity for districts to affirm compliance with state and federal requirements, and to request support from ODE as needed.

The second section of the ML/EL District Plan guides districts to describe their practices in each key area and incorporates inquiry stems employed by the EL Outcomes Program to gather perspective and information that will aid in root cause analysis and systemic interventions identification to develop local action plans. Information about the legal requirements and guidance from the state's Multilingual Learners Strategic Plan is incorporated throughout, as well as relevant resources and tools to support districts with their plan development.

District Assurances: Smartsheet Link

The district assurances are included as a check box instead of the district providing a written narrative. These items address systems that districts typically have in place. Select "Yes" if the district is addressing this activity or "ODE support requested" if the district would appreciate support with this item. The "ODE support requested" response will assist ODE staff in partnering with each district with their instructional program implementation.

Section 1. Identification of Multilingual English Learners

District Assurances required, check all that apply	**Yes**	**ODE Support Requested**
Oregon Language Use Surveys are administered to all incoming students upon registration.	✔	
ELPA screeners are administered to students within 30 calendar days of enrollment at the beginning of the school year, or 14 calendar days once the school year has begun.	✔	
Parent Notification letters are provided to students' families within 30 calendar days of enrollment.	✔	
Parent Notification letters include all federally required elements, including the language instructional program their child will be participating in and the rights of the parent/guardian to decline to enroll their child in the program. (ESSA Title I, Section 1112(e)(3)(A))	✔	

Section 2: Instructional Programming and Staffing

District Assurances required, check all that apply	**Yes**	**ODE Support Requested**
All students are assigned to both a core-content program and a language instruction service model.	✔	
The language proficiency of each student is considered when determining which language service model the district will provide the student.	✔	
All teachers have a valid Oregon teaching license and ESOL (English to Speakers of Other Languages) endorsement (if required for the position by the Teachers Standards and Practices Commission (TSPC).	✔	

All teachers in the EL instructional program without an ESOL endorsement have had training in instructional methods proven effective with EL students. These teachers do not provide EL instruction more than the Teachers Standards and Practices Commission (TSPC) permitted instructional hours by staff without an ESOL endorsement.	✔	
All teachers in the EL instructional program are fluent in English and any other language used for instruction, including having written and oral communication skills.	✔	

SECTION 3. ASSESSMENT AND PROGRESS MONITORING FOR CURRENT STUDENTS

District Assurances required, check all that apply	Yes	ODE Support Requested
Parents/guardians are provided ELPA and state content test results in languages they can understand.	✔	
Parents/guardians are notified of the testing schedule before the assessments start.	✔	
District staff process "opt-outs" (for ELA/Math state assessments) and parent/guardian requests for exemption (for ELPA/Science assessments) in a manner consistent with Oregon's Test Administration Manual.	✔	
The district uses the Oregon Department of Education (ODE) provided Test Administration Manuals and Training Materials.	✔	
Oregon state assessments (ELPA, ELA, Math, Science, etc...) are administered by trained staff.	✔	
Domain exemptions are available to students with an IEP or 504 plans as assessment accommodation where domain exemptions are appropriate.	✔	
Alt ELPA is available to students with significant cognitive disabilities.	✔	
Test administrator assurance forms are stored annually in a secure environment. These forms are located on the Assessment Administration page.	✔	
A district test coordinator inputs and monitors assessment accommodations/modifications/domain exemption coding in the Test Information Distribution Engine (TIDE).	✔	

SECTION 4. MONITORING EXITED STUDENTS

District Assurances required, check all that apply	Yes	ODE Support Requested
Parents/guardians must be informed of the desire to return a monitored EL/ML student to the EL Instructional program, and they must agree to this return to the EL instructional program.	✔	
Students that score proficient on ELPA (English Language Proficiency Assessment) summative are exited from the EL instructional program.	✔	
District staff monitor the implementation of the district monitoring processes (exited and waiver students) to ensure that student progress is routinely reviewed.	✔	
District provides instructional interventions for monitored ELs and ELs with parent/guardian waivers if needed	✔	

SECTION 5. EQUITABLE PROGRAM ACCESS

District Assurances required, check all that apply	Yes	ODE Support Requested
When an EL is suspected of having a disability, the disability evaluation is administered within required timelines once required notices have been provided and parental consent has been obtained.	✔	
The reason for the disability evaluation is based on the student's suspected disability and need for disability related services, and not on the student's ELP.	✔	
The evaluation uses appropriate methods to measure the student's abilities and not the student's English language proficiency.	✔	
The district reviews the student's language abilities in both English and the primary home language to provide evaluations whose results would be beneficial to instructional decisions.	✔	
The IEP or Section 504 team include participants who have knowledge of: the student's language needs, training in special education, training in appropriate related services, and	NA- the district does not have students	

professionals with training in second language acquisition or EL instructional services.	that meet both of these requirements.	
The parents/guardians have been invited to participate in the planning process (of their student's IEP) and informed of their rights, in a language they understand.	NA	
A trained interpreter (including sign language if appropriate) and translated documents have been made available for parents/guardians when required (e.g., parent/guardian notices under Individuals with Disabilities Education Act (IDEA), or when determined necessary to ensure effective communication.	NA	
The IEP or Section 504 plan outlines when and by whom the accommodations, modifications, and supports in the IEP or Section 504 plan will be provided.	NA	
There is a formal plan to monitor the progress of ELs with disabilities regarding language and disability-based goals.	NA	
The student's general education teachers and related service providers have been made aware of the IEP or Section 504 services for the EL.	NA	
All students with EL status have equitable access to CTE (Career and Technical Education)/ advanced coursework (including but not limited to IB/AP).	✔	
All students with EL status have equitable access to TAG/ Title I-A/Magnet schools/bilingual programs as available in district schools.	✔	

SECTION 6. FAMILY ENGAGEMENT AND COMMUNICATION

District Assurances required, check all that apply	**Yes**	**ODE Support Requested**
The district provides parents/guardians school-related information they need in order to make informed decisions about their children's education (language assistance programs, special education and related services, Individualized Education Program (IEP) meetings, grievance procedures, notices of nondiscrimination, student discipline policies and procedures, registration and enrollment, report cards, requests for parent	✔	

permission for student participation, etc...) in languages the parents/guardians can understand.		
The district has a process for determining, (1) if parents and guardians need language assistance and (2) the primary language of parents/guardians.	✔	
The district provides language assistance to parents/guardians with appropriate, competent staff or appropriate and competent outside resources.	✔	
The district: Does not use students, siblings, friends, minors, and untrained staff members as qualified translators or interpreters, even if they are bilingual. All interpreters and translators, including staff acting in this capacity, are: ● proficient in the target languages; ● have knowledge of specialized terms or concepts in both languages; ● are trained in the role of an interpreter or translator, ● the ethics of interpreting and translating, ● the need to maintain confidentiality.	✔	.
The district provides the Oregon Language Use survey in languages parents/guardians can understand.	✔	

SECTION 7. PROGRAM EVALUATION

District Assurances required, check all that apply	Yes	ODE Support Requested
The district understands and is compliant with annual evaluations of the implementation of its ML/EL instructional program.	✔	
The district annually reviews its identification process and has addressed any identified concerns related to its implementation.	✔	
The district annually reviews the EL exiting process and addresses any concerns related to its implementation.	✔	
The district annually reviews its monitoring process for exited and waived ELs to ensure that the district has followed its monitoring processes.	✔	

The district has addressed any identified concerns related to the implementation of the process.		
The district annually reviews its staffing for the ML/EL instructional program to determine: Language diversity of the students and the number of staff supporting the language diversity. Ethnic diversity of the students and number of staff with similar ethnic diversity. Bilingual abilities of the staff. The district has addressed any identified needs.	✔	
The district annually reviews its instructional materials for the ML/EL instructional program to determine: Instructional materials support ethnic diversity of enrolled students. Multicultural instructional materials are available for all content areas. Instructional materials are supportive of multilingual diverse cultures and communities. The district has addressed any identified needs.	✔	
The district annually reviews the ML/EL student population and determined any changes in instructional needs due to: ● Recent arrivers (including refugees, unaccompanied, etc.) ● Long Time ELs ● ELs with IEPs (Individual Educational Plan) ● Increase/decrease in populations ● Language diversity ● Ethnic diversity ● Other identified needs	✔	
The district annually reviews the participation of ML/EL parents in school/district decision making groups and the practices used to recruit parents to be involved in these groups.	✔	

The district has addressed any identified needs.		
The district annually compares the percentage of students with ML/EL status having IEPs (Individual Educational Plan) as compared to Never ELs having IEPs (Individual Educational Plan).	✔	
The district annually compares the percentage of students with ML/EL status also having TAG (Talented and Gifted) status to Never ELs having TAG (Talented and Gifted) status.	✔	
The district annually compares the outcome data of ELs (including monitored ELs) progress on state content assessments (ELA/Math) compared to the data of Never ELs.	✔	
The district annually reviews the outcome data (OTELP) of ELs progress in learning English.	✔	
The district annually compares the outcome data of former ELs (monitor and post-monitor) progress on state content assessments (ELA/Math) compared to the data of Never ELs.	✔	
The district annually compares attendance rates for ELs and compares these rates to Never ELs.	✔	
The district annually compares discipline data for ELs and Never ELs.	✔	
The district shares the above data reviews with educators (including EL specialists, classroom teachers, special education specialists, counselors, building level administrators, district level administrators, and school board members) annually.	✔	

ML/EL DISTRICT PLAN

SECTION 1. IDENTIFICATION OF MULTILINGUAL ENGLISH LEARNERS

Legal Requirements and Guidance for Identification of English Learners

- States must have a standard EL identification process across all LEAs (local education agencies). (ESSA Sec. 3113(b)(2))
- School districts must have procedures in place to accurately and timely identify students whose primary home language is other than English and determine if the student qualifies as an EL through a valid and reliable assessment (Dear Colleague Letter, Jan 2015).
- School districts must administer the ELPA identification screener to all qualifying students as identified by the required Oregon Language Use Survey. (ESSA Title III – statewide identification – ESSA 3111 (2) (A)
- ELPA identification screener must be administered by a trained staff member (OAR Test Administration Manual).
- Parents/guardians must be notified within 30 calendar days of their student being identified as EL by communication in a language parents/guardians can understand (ESSA Title I, Section 1112(e)(3)(A).

District Plan for Identification of English Learners

1. Describe the district's process for identifying the language backgrounds of students arriving in your school/district, including administration of the Language Use Survey.

   Upon enrollment, families complete the Language Use Survey to identify the languages spoken by the student and within the home. The survey is reviewed by designated staff to determine if further screening is required. When a language other than English is indicated, the student is administered the state-approved English language proficiency assessment to determine eligibility for ELD services. All results are documented in the student's record and entered into the district's student information system to ensure appropriate identification and placement.

2. Identify the district staff responsible for working with families to complete the Language Use Survey.

   District licensed/certified professional (for example, English learner program coordinator, bilingual specialist)
   District support staff (for example, secretary, school enrollment/registration personnel)

School licensed/certified professional (for example, English learner teacher, classroom teacher, counselor)
School support staff (for example, secretary, parent/community liaison, paraprofessional). Parents/guardians complete the form independently (for example, the district provides a link to an online home language survey and parents/guardians complete it at home)
Other (specify) _____

3. How are families informed about the English Learner identification process, including the purpose and use of the Oregon LUS?
   A multitiered communication system is in place to assure families have clarity on the process and the outcomes of the assessments administered.
   Our system has a welcome center which guides families through the process, using interpreters as necessary for clear communication throughout the process.
   Families are notified in writing if a written translation is not provided. An oral interpretation is made available whenever needed.
   ELPA screening results and program eligibility (including waiver options) is communicated to families via a letter, interpreters are available via phone for questions and clarifications
   Other: _____

4. Identify how the Oregon Language Use Survey (LUS) is administered.
   Paper survey (including a form downloaded from district website)
   Online survey via computer, tablet, or another electronic device
   Verbal survey administration for all families
   Verbal survey administration for select families (for example, low literacy, non–English speaking, disability) or if requested
   Other (specify) _____

5. Describe the district's process for reviewing the Oregon Language Use Survey (LUS) information and ensuring that all students are screened in accordance with the federal time requirements within 30 days of enrollment.

1. Review of LUS Information

- Upon enrollment, families complete the Oregon Language Use Survey (LUS).
- Designated enrollment or ELD staff review all surveys to identify any indication of a language other than English.

- LUS forms indicating another language are forwarded to the ELD coordinator for follow-up and documentation.

2. Screening Procedures

- Identified students are administered the **state-approved English language proficiency screener** (ELPA Screener) within **30 calendar days** of the start of the school year or within **two weeks of enrollment** if the student enters after the first 30 days.

- Screening results determine eligibility for English Language Development (ELD) services.

3. Monitoring and Compliance

- The district maintains a centralized tracking system to ensure all screenings are completed within required federal timelines.

- Documentation of LUS results, screening outcomes, and eligibility determinations are maintained in the student's cumulative file and recorded in the district's student information system.

- The ELD coordinator regularly reviews data to verify compliance with state and federal requirements.

6. Describe the district's process for screening and recording results of the screener in the district's student record system.

1. Screening Procedures

- When the Oregon Language Use Survey (LUS) indicates a language other than English, the student is referred for English language proficiency screening using the state-approved ELPA Screener.

- Trained ELD staff administer the screener following state testing protocols to ensure validity and consistency.

- Screening is completed within 30 days of enrollment (or within two weeks for students enrolling after the first 30 days of school).

2. Recording and Documentation

- Upon completion, screener results are reviewed by the ELD coordinator or designee to confirm eligibility determination.

- Results are entered into the district's student information system (SIS) and the state reporting system in accordance with ODE data entry timelines.

- A copy of the score report and eligibility determination is filed in the student's cumulative record and shared with school staff as appropriate to support placement and instruction.

7. Describe how district staff are trained on the purpose and uses of the Oregon Language Use Survey and ELPA screener. [required, open-ended response]

District staff receive training annually on the purpose and use of the Oregon Language Use Survey (LUS) and the ELPA Screener as part of our ELD program orientation and ongoing professional development. During registration and enrollment, families complete the LUS to describe the languages used by their child and within the household. Staff are trained to understand how the information provided by parents is used to determine whether a student should be administered the ELPA Screener to assess English language proficiency. Training includes guidance on accurately reviewing the survey, interpreting responses, and communicating with families. Ongoing refreshers are provided throughout the year to support consistency and compliance. Training for administering the ELPA includes a review of the Test Administration Manual (TAM), completion of the Remote Testing Training modules and ELPA training modules provided by the Oregon Department of Education. These trainings ensure that all test administrators are knowledgeable about secure testing practices, accessibility features, test protocols, and appropriate testing environments. The ELD Coordinator and building administrators provide guidance and oversight to ensure consistent implementation and compliance with state requirements across the district.

8. Are there schools with at least 15 or more students in a particular grade K-5 who qualify for English Learner services who speak the same home language that could be potential sites for new dual language programs? If so, please describe below.

Not applicable

9. Describe the district's process for enrolling students with disabilities (or suspected disabilities) when the ELPA (English Language Proficiency Assessment) screener may not be accessible. (EL data collection code 2-J)

Students who arrive in the district with existing accommodations documented in an IEP or 504 Plan will participate in the Alt-ELPA using accommodations that align with their individual needs. For newcomer students who do not yet have accommodations in place, the district determines placement based on collaboration between the ELD teacher and classroom teacher through observation of the student's language use and classroom engagement. Input is also gathered through family interviews and feedback to ensure a complete understanding of the student's background and needs. In addition, data is collected and analyzed from local assessments, academic grades, and classroom participation records.

Resources for Identification of English Learners

- See ESSA Section 1112(e)(3)(A)
- See ESSA Section 3113(b)(2)
- Mesoamerican Language Guidance

SECTION 2. INSTRUCTIONAL PROGRAMMING AND STAFFING

Legal Requirements and Guidance for High Quality Instructional Programming

- School districts must provide EL students with effective Language Instruction Education Programs (LIEPs). Dear Colleague Letter, OAR 581-023-0100(4)OAR 581-023-0100(4)
- LIEPs must ensure EL students access grade-level academic standards or core content area courses ESSA Title III 3102
- Increase the quality of instruction to meet the diverse strengths and needs of multilingual learners while reflecting and affirming their intersectional identities. Oregon Multilingual Learner Strategic Plan – Priority area 2, Goal 2

- Students designated as English learners have equitable access to grade-level academic courses, accelerated learning, career connected learning opportunities, and enrichment opportunities. Oregon Multilingual Learner Strategic Plan – Priority 2, Goal 4.
- Oregon educational entities implement high-quality dual language programs that prioritize students designated as English learners. Oregon Multilingual Learner Strategic Plan – Priority 4, Goal 1. Section 3: Assessment and Progress Monitoring
- Districts must ensure that it is providing appropriate licensed staff, instructional materials, supplies and materials to support their EL instructional program under the OAR 581-023-0100 (4).
- Districts must address the Title III purposes under ESSA SEC. 3102.Title III [20 U.S.C. 6812] with regard to implementation of the EL instructional program and professional learning.
- Districts must ensure that their instructional program is supported by educators whose licenses and endorsements meet these TSPC OARs. OAR 584-220-0075 English to Speakers of Other Languages Endorsement Requirement and OAR 584-210-0160 (2) (a) Teaching assignments that exceed 10 hours per week in one subject-matter area without the appropriate subject-matter endorsement. – Endorsement Requirement
- Districts are required under ESSA SEC. 3116 Title III. [20 U.S.C. 6826] to ensure that all educators in any language instruction education program are fluent in English and any other language used in instruction. Fluent refers to both oral and written communication.
- Oregon districts recruit, hire, retain, and advance multilingual educators of color who mirror the intersectional identities of students designated as English learners. Oregon Multilingual Learner Strategic Plan - Priority 3, Goal 1
- In-service teachers, administrators, and school staff members engage in ongoing, high-quality professional learning to support multilingual learners. Oregon Multilingual Statewide Strategic Plan - Priority 3, Goal 3

District Plan

After reviewing your district's most recent data for ELA/Math/Graduation Rate/OTELP, determine your district's educational goals for multilingual ELs. Format each goal as a SMART goal (Specific, Measurable, Attainable, Realistic, and Timely).

Example: By June 2028, our district will increase the percentage of elementary Multilingual Learners On Track to English Language Proficiency from 55.5% to 63%.

Elementary K-5 (required all districts)

Language Proficiency Goal	Core Content Goals (ELA, Math, etc.)

Middle 6-8 (required all districts)

Language Proficiency Goal	Core Content Goals (ELA, Math, etc.)

High 9-12 (required by all districts with High Schools)

Language Proficiency Goal	Core Content Goals (ELA, Math, etc.)	Graduation Goal

Newcomer 6-8 (if applicable)

Language Proficiency Goal	Core Content Goals (ELA, Math, etc.)

Newcomer 9-12 (if applicable)

Language Proficiency Goal	Core Content Goals (ELA, Math, etc.)	Graduation Goal

Students with IEPs (Individual Educational Plan) (if applicable)

Language Proficiency Goal	Core Content Goals (ELA, Math, etc.)	Graduation Goal

Districts identified for the EL Outcomes Program will receive support from ODE staff to develop a set of complementary high-impact goals that will guide the strategic planning for implementation of systemic interventions over the next four years of identification. For these districts, goals must reflect indicator areas where the district was identified from the EL Outcomes Data Profiles.

From the district Data Profile, identify and list the elementary and secondary grade indicators that are below the Notable Progress level and their level: limited or some progress.

District Data Profile and Longitudinal Data Profile

EL Outcomes Program Indicators

Elementary Indicators	Secondary Indicators

Per OAR 581-020-0613 the Comprehensive Needs Assessment for EL Outcomes Program identified districts "*will examine the root causes impacting student's performance and program quality and effectiveness. The evaluation must include, but not be limited to, program design, program model, instructional delivery strategies, curriculum, assessment, staff qualifications, staff training on culturally responsive instructional pedagogy and practices, and the level of engagement with ELL families and community.*"

1. In the table below, identify the schools in your district that implement the following core content program models. The same school may be listed more than once if it implements more than one program model.

Core Content Program Models - Access to on grade level core content

Program Model	School(s) (indicate whether the school is elementary, middle, or high)
Dual Language Program (Two-way or one-way): Dual language programs provide instruction in English and another language for at least 50% or more of the instructional time. Programs begin in kindergarten and continue through middle or high school to fully develop bilingual and biliterate proficiency.	NA
Transitional Bilingual Programs (Early or late exit): Transitional bilingual programs use the student's primary language as a foundation to support English language development with 90% of initial instruction in the primary language, increasing English instruction systematically until all instruction is provided in English.	NA
Sheltered Instruction (English is the primary language of instruction): Content-Based Instruction (CBI) or "sheltered" instruction is used in classes using instructional strategies that support access to core content instruction. Some examples of this include GLAD, SIOP, and Constructing Meaning.	Alsea School K-12
Newcomer Program: The Newcomer Program provides specialized instruction to beginning level multilingual/English learners who have newly immigrated to the United States and may have limited or interrupted formal education or low literacy in their primary language. Typical program length ranges from one semester to one year for most students.	NA

2. Use the following table as reference to describe the district's instructional models for English language development in the subsequent table.

English Language Development Instructional Model – English language acquisition

The following ELD instructional models describe the different modes in which students with English learner services receive their English language development instruction.

Service Type	Description
Integrated ELD **'Push-in'**	English language development instruction is provided within the student's mainstream or content-area classroom. English language development standards are integrated with core-content standards. The following educators may provide this instruction: English Language Development (ELD) specialist who collaborates and co-plans with a core content or general education teacher. A core content teacher or general education teacher who collaborates and co-plans with an ELD specialist. A core content or general education teacher who has an ESOL (English to Speakers of Other Languages) endorsement may provide this language instruction in lieu of consultation with an ELD specialist. Students' progress with language proficiency is monitored by both the ELD specialist and the core-content or general education teacher.
Designated ELD **'pull-out'**	English language development instruction is provided outside of the classroom and EL students are removed from mainstream classroom for a portion of the day. This approach is more common in elementary school settings.
Designated ELD Class Period	English language development instruction is provided during a stand-alone class period, and students receive course credit for the class. This approach is more common in middle schools and high schools.
Newcomer ELD	English language development instruction is provided in a separate setting with relatively self-contained educational interventions designed to meet the academic and transitional needs of newly arrived immigrants. Typically, students attend these programs on a short-term basis (usually no more than one year) after which they receive ELD instruction through integrated, designated or ELD class periods service types.

Elementary School English Language Development Instructional Services

Describe how ELD instruction is provided and describe how the instruction is differentiated for students at each language level. Include details on how students are grouped, when students receive ELD instruction, and where instruction takes place.

	Beginning Level **(0-2 years in program)**	**Intermediate Level** **(2-5 years in program)**	**Long-Term English Learners (LTELs)** **(5+ years in program)**
ELD Instruction Service Model(s):	NA	**Pull-Out Model:** Currently, one student receives English Language Development (ELD) services through a pull-out model. The student is served once per week for 30 minutes in the ELD classroom, where instruction is delivered in English.	NA
Core ELD Instructional Materials		Savvas Reading Curriculum	
Supplemental ELD Instructional Materials			

Middle School English Language Development Instructional Services

Describe how ELD instruction is provided and describe how the instruction is differentiated for students at each language level. Include details on how students are grouped, when students receive ELD instruction, and where instruction takes place.

	Beginning Level (0-2 years in program)	Intermediate Level (2-5 years in program)	Long-Term English Learners (LTELs) (5+ years in program)
ELD Instruction Service Model(s)			
Core ELD Instructional Materials			
Supplemental ELD Instructional Materials			

High School English Language Development Instructional Services

Describe how ELD instruction is provided and describe how the instruction is differentiated for students at each language level. Include details on how students are grouped, when students receive ELD instruction, and where instruction takes place.

	Beginning Level (0-2 years in program)	Intermediate Level (2-5 years in program)	Long-Term English Learners (LTELs) (5+ years in program)
ELD Instruction Service Model(s)			
Core ELD Instructional Materials			
Supplemental ELD Instructional Materials			

3. Describe your district's alternative and/or charter schools and their ELD instruction service model(s). Include these models based on EL Proficiency Level(s) if applicable. (The district can copy the table above to include these schools if desired.)

   Not applicable. Alsea SD 7J uses the same service model for every student that has been identified as ELD.

4. Describe components of the EL Program Model that have elements that affirm EL student identity**.** Identify components of your EL program containing racially/ethnically, culturally, and/or linguistically affirming elements and explain why/how.

   The district's Pull-Out ELD Program affirms the racial, cultural, and linguistic identities of English Learners by providing small-group instruction that values and incorporates students' diverse backgrounds. Lessons connect language learning to students' lived experiences and include materials that reflect a range of cultural and linguistic perspectives. Teachers use culturally and linguistically responsive practices to promote engagement and belonging. Collaboration between ELD and classroom teachers ensures that students' cultural and linguistic strengths are recognized throughout the school day, while multilingual family communication and cultural events further celebrate and support EL students as valued members of the school community.

5. Describe how the district provides targeted, research-based literacy support to students designated as English learners.

   The district provides targeted, research-based literacy support for English Learners through structured ELD instruction focused on vocabulary, reading comprehension, and writing development. Lessons are differentiated by proficiency level and use evidence-based strategies such as guided reading, interactive read-alouds, and explicit language instruction. Collaboration between ELD and classroom teachers ensures consistent literacy support across subjects, and ongoing progress monitoring informs adjustments to meet individual student needs.

6. In the following table, identify the number and qualifications of ELD teachers, ELD instructional assistants, and other staff who work with multilingual learners/ELs.

	Number of ELD teachers and their qualifications	Number of ELD Instructional Assistants	Describe other staff who work with ML/EL students (if applicable)
Elementary School(s)	1- ESOL Endorsement, teaching degree	0	
Middle School(s)	1- ESOL Endorsement, teaching degree	0	
High School(s)	1- ESOL Endorsement, teaching degree	0	
Charter School(s)			
Alternate Program/ School(s)			

7. Describe the extent to which district administrators and staff mirror the students and communities they serve. What systems of support exist for bilingual staff members?

   [District Response]

8. Describe the structure for educators to plan effective learning experiences that meet the needs of multilingual English Learners. Include protected time for Tier 1/core-content instructional staff to consult and engage with ELD staff and any co-planning if appropriate.

Elementary Grades	Secondary Grades
Instructional Planning Structure	**Instructional Planning Structure**

9. Provide a brief narrative about the kind of professional development opportunities teachers, administrators, and staff engage in that improve multilingual EL systems and

support. Please make sure to include any training on Culturally Responsive Instructional Pedagogy.

[District Response]

10. Indicate what the focus for professional development will be in the coming two years. [multiple choice, check all that apply]
    - Integrated ELD – Collaborative Co-Teaching
    - Dual language program implementation/improvement
    - Newcomer/Recently arrived students
    - Multilingual family engagement and communication
    - Language acquisition strategies
    - ELP progress monitoring/Data analysis
    - Racial equity
    - Culturally and linguistically responsive practices
    - Culturally Responsive Instructional Pedagogy and Practices
    - Other (write in)

11. Describe the district's professional development prioritization by staff role, position, or experience level in the table below (add additional rows as needed).

Professional development priority	Staff role/position	Staff experience level	Other identified criteria
1st			
2nd			
3rd			
4th			

Resources for High Quality Instructional Programming and Staffing

- An Integrated ELD Guide for District Leaders
- IES (Institute of Education Sciences) What Works Practice Guide, "Teaching English Literacy & Content K-8"
- IES What Works Practice Guide, "Effective Literacy and English Language Instruction for English Learners in the Elementary Grades."
- OELA English Learner Toolkit, chapters 2, 3, 4, 5 cover language instructional programs, meaningful access to core instruction, avoiding segregation, and staffing.
- IES What Works Practice Guide, "Teaching Academic Content and Literacy to English Learners in Elementary and Middle School"

- Regional Education Labs, Professional Learning Communities Facilitator's Guide for the What Works Clearinghouse™ Practice Guide: Teaching Academic Content and Literacy to English Learners in Elementary and Middle School
- Regional Education Labs, Supporting Integrated English Learner Student Instruction – A Guide to Assess Professional Learning Needs
- Regional Education Labs, Welcoming, Registering, and Supporting Newcomer Students: A Toolkit for Educators of Immigrant and Refugee Students in Secondary Schools
- Effective Teacher Professional Development, Learning Policy Institute
- Oregon Open Learning Multilingual/English Learner Resource bank
- ODE Engaging Equity Mindset, Practices and Systems professional development modules

SECTION 3. ASSESSMENT AND PROGRESS MONITORING

Legal Requirements and Guidance for Assessment and Progress Monitoring

- All students designated as English learners must be assessed annually using a valid and reliable, state-approved assessment in all four domains of English (i.e., speaking, listening, reading, and writing) ((6311(b)(7) (Title I), 6823(b)(3)(D) (Title III), 6826(b)(3)(C) (Title III))
- Staff who administer the assessment must be trained (Test Administration OAR)
- Oregon is a member of the ELPA 21 Consortium and requires districts to administer the ELPA Screener and Assessment (Oregon Test Administration Manual (TAM)
- Parents/guardians must be informed annually of their child's progress (ESEA/ESSA Title I, Section 1112(e)(2)(A), DCL Fact Sheet
- Assessment practices reflect multilingual learners' academic and linguistic progress and affirm the knowledge and cultural assets they bring. Oregon Multilingual Learner Strategic Plan - Priority 2, Goal 3.

District Plan

1. Identify who is responsible for working with families to complete the ELPA Screener assessment:

   District licensed/certified professional (for example, English learner program coordinator, bilingual specialist, central office administrator, ELD TOSA (Teachers on Special Assignment)

   School licensed/certified professional (for example, building administrator, English learner teacher, classroom teacher, counselor)

School support staff (for example, parent/community liaison, paraprofessional)
Other (specify) _____

Training

2. Describe the district's process for annually training test administrators, including who is responsible.

   [District Response]

Accommodations

3. Describe the district's process for determining and reporting testing accommodations (including domain exemptions).

   [District Response]

Progress Monitoring

4. List the local assessments used to monitor multilingual English learners' progress and programming decisions in the table below.

	Academic Assessments	Language Assessments
Elementary:	**i-Ready assessment** **State testing**	**i-Ready assessment** **State testing**
Middle School:	**i-Ready assessment** **State testing**	**i-Ready assessment** **State testing**
High School:	**i-Ready assessment** **State testing**	**i-Ready assessment** **State testing**

5. Indicate the staff responsible for monitoring students who HOLD CURRENT EL STATUS.
   EL Specialist
   Content Teacher
   Counselor
   Educator/instructional assistant
   Principal
   Other classified staff
   Other licensed staff
   Other administrative staff

6. Indicate the frequency of the district's monitoring process for students WHO HOLD CURRENT EL STATUS.
    - During RTI/MTSS regular meetings
    - Monthly
    - Every two months
    - Quarterly
    - During grading periods
    - Once a year
    - Other

7. Indicate which data sources the district uses to monitor the progress of students with current English learner status.
    - State English language arts assessments
    - State math assessments
    - State science assessments
    - State English Language Proficiency Assessment (ELPA)
    - Formative assessments
    - Grades
    - Teacher observations
    - Other

8. Describe the routine employed to monitor students' progress towards demonstrating language proficiency and students' progress towards demonstrating proficiency of content standards.

    The district routinely monitors progress toward language proficiency and content standards through multiple measures. The ELD teacher and classroom teachers collaborate to review formative and summative assessment data, classroom performance, and language samples to track growth in reading, writing, speaking, and listening. Progress toward English language proficiency is monitored using ELPA results, local assessments, and classroom observations. Content progress is reviewed through grade-level assessments, report cards, and teacher feedback.

Resources for Assessment and Progress Monitoring

- Test Administration Manual
- Oregon Accessibility Manual
- ELPA Screener Manual

SECTION 4. MONITORING EXITED STUDENTS

Legal Requirements and Guidance for Progress Monitoring for Excited Students

- School districts must exit students who score proficient on the annual ELPA summative assessment. (ESSA section 3113(b)(2))
- School districts must monitor exited students for four years following their exit to determine that the student continues to be able to access academic content. The monitoring must be of sufficient frequency for the district to provide interventions if needed. (ESSA section 3121(a)(5)) (Dear Colleague Letter, Section H)
- School districts must monitor EL students with parent/guardian waivers for participation in the EL instructional program. The monitoring must be of sufficient frequency for the district to provide interventions if needed. (Dear Colleague Letter, Section G)
- Parents/guardians must approve a monitored EL returning to the EL instructional program. (Dear Colleague Letter, Section H)
- Oregon's Honoring Student Proficiency on the High School (HS) ELPA Summative is a waiver from the U.S. Department of Education that allows the Oregon Department of Education (ODE) to capture all students' responses in ELPA language domains when the student has met proficiency in that domain. The student does not take the proficient domains in future ELPA administrations. ODE staff take the captured responses and recalculates the student's domain results.
- Oregon's Future K – ELPA screener policy. Oregon has established different ELPA screener proficiency levels for students who are in kindergarten. The Future-K policy allows for domain scores of three (3) in each domain to be proficient from March – early January of any given school year.

District Plan

1. Describe the district's process for returning a monitored student to the EL instructional program.

   If a monitored student shows signs of difficulty in accessing grade-level content or maintaining academic progress, the ELD teacher collaborates with classroom teachers to review assessment data, work samples, and classroom performance. If evidence suggests that language proficiency remains a barrier to success, the team consults with the ELD coordinator and obtains parent input. Based on this review, the student may be re-screened or formally re-entered into the EL program to receive targeted ELD instruction and support.

2. Describe the district's process for monitoring students who have scored proficient on ELPA for four years.

The district monitors students who have scored proficient on the ELPA for four years to ensure continued academic success and language development. During this monitoring period, ELD and classroom teachers collaborate to review academic performance, classroom assessments, and teacher observations at regular intervals. Progress is documented using district monitoring forms and stored in the student's record. If a student demonstrates academic or language difficulties, the team discusses appropriate interventions or supports. The ELD coordinator oversees the process to ensure all monitored students are reviewed consistently each year and that any concerns are addressed promptly to support sustained success after exiting the EL program.

Elementary:

Monitor Year 1 & Monitor Year 2

- Twice a year, following fall and winter benchmark testing, classroom teachers will receive an electronic survey seeking feedback regarding monitored students' academic progress.
  - ELD teacher will send survey
  - Classroom teachers will provide feedback
  - ELD teacher and/or ELD Coordinator will review surveys
    - If data indicates academic concern, either the ELD teacher and/or ELD Coordinator will notify the school support team
  - Survey will be stored in student's permanent cum file by ELD team

Monitor Year 3 & Monitor Year 4

- Once a year, following fall benchmark testing, classroom teachers will receive an electronic survey seeking feedback regarding monitored students' academic progress.
  - ELD teacher will send survey
  - Classroom teachers will provide feedback
  - ELD teacher and/or ELD Coordinator will review survey
    - If data indicates academic concern, the school support team will be notified by either the ELD teacher and/or ELD Coordinator
  - Survey will be stored in student's permanent cum file by ELD team

Secondary:

Monitor Year 1 & Monitor Year 2

- Twice a year, October and March, content teachers will receive an electronic survey seeking feedback regarding monitored students' academic progress.

        - ELD teacher will send survey
        - Content teachers will provide feedback
        - ELD teacher and/or ELD Coordinator will review survey
            - Surveys indicating academic concern will be flagged for further review in conjunction with midterm grades
        - Survey will be stored in student's permanent cum file by ELD team
    - Twice a year, November and March, progress and attendance reports will be reviewed by ELD Coordinator
        - Grade and attendance reports will be reviewed in conjunction with feedback from content teacher surveys
            - If data indicates academic concern, the school support team will be notified by either the ELD teacher and/or ELD Coordinator

Monitor Year 3 & Monitor Year 4

- Once a year, in October, content teachers will receive an electronic survey seeking feedback regarding monitored students' academic progress
    - ELD teacher will send survey
    - Content teachers will provide feedback
    - ELD teacher and/or ELD Coordinator will review survey
        - Surveys indicating academic concern will be flagged for further review in conjunction with midterm grades
    - Survey will be stored in student's permanent cum file by ELD team
- Once a year, in November, progress and attendance reports will be reviewed by ELD Coordinator
    - Grade and attendance reports will be reviewed in conjunction with feedback from content teacher surveys
        - If data indicates academic concern, the school support team will be notified by either the ELD teacher and/or ELD Coordinator

3. Indicate the staff responsible for monitoring students who have scored proficient on ELPA.

    EL Specialist
    Content Teacher
    Counselor
    Educator/instructional assistant
    Principal

Other classified staff
Other licensed staff
Other administrative staff

4. Indicate the frequency of the district's monitoring process.
   During RTI/MTSS regular meetings
   Monthly
   Every two months
   Quarterly
   During grading periods
   Once a year
   Other

5. Indicate which data sources the district uses to monitor the progress of students formerly designated as English learners.
   State English language arts assessments
   State math assessments
   State science assessments
   Formative assessments
   Grades
   Teacher observations
   Other

6. Describe how the district provides instructional interventions for students after they have exited the ELD program when monitoring evidence indicates instructional interventions are needed.

Monitored students who are not succeeding in core instruction will be brought to the school support team. The school support team will analyze data and appropriate interventions will be initiated.

Monitoring Students With EL Program Parent Waivers

7. Describe the district's process for monitoring students with parent/guardian waivers for participation in the ELP program. Districts are required to monitor these students' progress learning English and accessing on grade level core content to provide instructional interventions if appropriate (add in check boxes from above for waiver monitoring).

   In the fall, parents of English learners with a waiver on file receive a letter from the ELD program stating that their student continues to qualify for ELD support and may return to the program at any time. English learners with a waiver for service will be included in the district's four-year monitoring process. Waived students participate in all building,

district and state assessments, including ELPA21. Parents receive progress reports and state assessment results throughout the year.

8. Describe the district's process for communicating the academic needs of waived EL students to parents/guardians.

Waived students participate in all building, district and state assessments, including ELPA21. Parents receive progress reports and state assessment results throughout the year.

Resources for Progress Monitoring for Exited Students

- See ESSA section 3121
- See OELA EL Toolkit, Chapter 8
- See ESSA EL Toolkit, Chapter 7
- MTSS4ELs Meeting the Needs of English Learners Through a Multitiered Instructional Framework

SECTION 5. EQUITABLE PROGRAM ACCESS, POLICIES, AND PRACTICES

Legal Requirements and Guidance for Equitable Program Access

- Districts must identify, locate, and evaluate English Learners with disabilities in a timely manner and intake ESSA; U.S. Department of Justice & U.S. Department of Education, 2015 ESSA; U.S. Department of Justice & U.S. Department of Education, 2015. Districts must consider the English language proficiency of ELs with disabilities in determining appropriate assessments and evaluation materials.
- Individuals with Disabilities Education Act (IDEA) and Section 504 of the Rehabilitation Act of 1973 (Section 504)
- A student with an IEP or 504 may be exempt from up to three domains of the ELPA and this decision must be made by the student's IEP or 504 team. The team must include staff that understand second language acquisition.
- ESSA; U.S. Department of Justice & U.S. Department of Education, 2015
- English Language Proficiency Assessment Guidance – this web page includes guidance for the ELPA summative and Alt ELPA assessment.
- Districts offer early college high school, or dual or concurrent enrollment programs or courses designed to help English learners achieve success in postsecondary education.
- ESSA Title III (SEC. 3115. [20 U.S.C. 6825])

- Students designated as English learners have equitable access to grade-level academic courses, accelerated learning, career connected learning opportunities, and enrichment opportunities. Oregon Multilingual Learners Strategic Plan - Priority 2, Goal 4
- Newcomers and students with limited or interrupted formal education are welcomed and integrated into Oregon schools and provided with the academic and social and emotional learning support they need to succeed. Oregon Multilingual Learner Strategic Plan - Priority 2, Goal 5.

District Plan

1. Use the table below to identify the proportion of never, former, current, and monitored EL students engaging with key programs.

Student Group	Proportion of students in Special Education	Proportion of students in TAG
Never EL students:		
Former EL students:		
Current EL students:		
Monitored EL students:		

	Proportion of students enrolling in AP/IB courses.	Proportion of students enrolling in college credits.	Proportion of students earning a diploma.		Proportion of students enrolling in CTE courses
			Regular	Modified	
Never EL students:					
Former EL students:					
Current EL students:					
Monitored EL students:					

	Proportion of students completing AP/IB courses. (district to pull this data)	Proportion of students completing college credits. (district to pull this data)	Proportion of students earning a Seal of Biliteracy/Multiliteracy (provided in data packet)	Proportion of students completing CTE courses (district to pull this data)

Never EL students:				
Former EL students:				
Current EL students:				

2. Describe the district's process for identifying and serving multilingual students who are talented and gifted.

   The district identifies multilingual students for Talented and Gifted (TAG) services through a multi-step process that considers both academic performance and linguistic strengths. Teachers, parents, and specialists can refer students for evaluation, which includes reviewing classroom performance, assessment data, and language proficiency. The district uses culturally and linguistically responsive assessment tools to ensure equitable identification of multilingual learners.

3. Describe the district's process for serving students who are dually identified as English learners and for special education.

   ELD and special education teachers work together to align instruction and supports, ensuring that both language development and individualized education plan (IEP) goals are addressed. Instruction is differentiated to meet students' linguistic needs while providing accommodations and modifications required by the IEP. Regular team meetings, including parents and specialists, review progress in both language proficiency and academic achievement, and adjustments to instruction are made as needed to support the student's overall growth.

4. Describe the district's process for access to IB/AP/dual enrollment courses as related to EL students.

   [District Response]

5. Describe the district's process for access to CTE courses as related to EL students.

   [District Response]

6. Describe the district's process for ensuring that middle and high school EL students receive meaningful access to courses needed to graduate on time. Include the practices specific to ensuring that recently arrived students receive course credit for prior educational experiences along with the district's implementation of Access to Linguistic Inclusion, HB2056.

[District Response]

7. Describe the process employed to analyze scheduling decisions to ensure that students who are engaged with EL programming have equitable access to extracurricular and enrichment opportunities.

   [District Response]

8. Describe the support provided to newcomers and students with limited or interrupted formal education. What is the district's process for evaluating the prior schooling experiences of students with non-U.S. schooling experiences?

The district helps newcomers and students with limited or interrupted schooling by providing focused English language support, reading and writing help, and personalized learning plans. For students who attended school outside the U.S., the district reviews transcripts, talks with families, and checks reading, math, and language skills when records are incomplete.

9. Describe the district's process for engaging EL students in earning the Oregon State Seal of Biliteracy/Multiliteracy. Of the district's EL student population, what percentage rate of graduating seniors earn the Seal of Biliteracy/Multiliteracy?

   [District Response]

10. Identify potential barriers that EL students may experience to language development, content learning, and/or socio-emotional development because of the policies and practices in place.

    [District Response]

11. Identify policies and practices that can dismantle oppression, marginalization, and harm that currently exists.

    [District Response]

12. What obstacles have you encountered that have prevented the implementation of successful policies and practices? What resources are needed to overcome these barriers? Are these resources available to you?

    [District Response]

Resources for Equitable Program Access

- See OELA EL Toolkit, Chapter 6
- IES (Institute of Education Sciences) Regional Education Labs, Identifying and Supporting English Learner Students with Learning Disabilities: Key Issues in the Literature and State Practice
- MTSS (Multi-Tiered Systems of Support) for English Learners
- English Learners With Significant Learning Difficulties or Disabilities: Recommendations for Practice
- MTSS4ELs Core and Supplemental English as a Second Language Literacy Instruction for English Learners
- MTSS4ELs Professional Development to Support a Multitiered Instructional Framework

SECTION 6. FAMILY ENGAGEMENT AND COMMUNICATION

Legal Requirements and Guidance for Family Engagement and Communication

- Districts are required to promote parental, family, and community participation in language instruction educational programs for the parents, families, and communities of English learners (ESSA Sec. 3113(b)(2))
- Parents/guardians must be notified within 30 calendar days of their student being identified as EL by communication in a language parents/guardians can understand (ESSA Title I, Section 1112(e)(3)(A)
- Parents/guardians must be informed annually of their child's progress (ESEA/ESSA Title I, Section 1112(e)(2)(A), DCL Fact Sheet
- Multilingual learners are authentic partners in state and local decision-making that directly impacts them and their communities. Oregon Multilingual Learner Strategic Plan - Priority 1, Goal 1
- Families, caregivers, and communities are engaged as authentic partners in informed decision-making and advocacy to ensure the success of multilingual learners. Oregon Multilingual Learner Strategic Plan - Priority 1, Goal 2

District Plan for Family Engagement and Communication

1. Provide a brief narrative description of district strategies and opportunities for engaging ML/EL families and communities as authentic partners.

   [District Response]

2. Describe what engagement opportunities the district provides for EL students to inform program decisions, curriculum adoptions or funding decisions.

   [District Response]

3. Describe how the district provides parents/guardians with access to their student's academic progress and educational information in their home language. What training does the district provide to students' parents/guardians school to family communication platforms such as ParentVUE, Parent Square, Remind, Canvas?

   [District Response]

4. Describe how the district provides translation and interpretation services. Include details on services provided in-house and outsourced. List languages among district staff members who provide interpretation and translation services.

   [District Response]

5. Describe how the district informs parents/guardians about the availability of free language assistance services, including qualified interpreters and translators.

   [District Response]

6. Describe the district's procedures that ensure that interpreters and translators have knowledge of all specialized educational terms and concepts.

   [District Response]

7. Describe the district's process to report this plan, information about programs, services, and activities available to everyone, and student progress to the community meaningfully and transparently.

   [District Response]

8. Describe how the district differentiates community engagement support and strategies for various EL communities served.

   [District Response]

Resources for Family Engagement and Communication

- ODE Community Engagement Toolkit
- OELA (Office of English Language Acquisition) Family Toolkit
- Regional Education Laboratory Toolkit of Resources for Engaging Families and the Community as Partners in Education. Part 1: Building an Understanding of Family and Community Engagement
- MTSS4ELS Fostering Collaborative Partnerships With Families of English Learners Within a Multitiered System of Supports

SECTION 7. PROGRAM EVALUATION

Legal Requirements and Guidance for Program Evaluation

- Districts must engage in a self-evaluation every two years and provide that evaluation to the state. Castañeda, 648 F.2d at 1014-15; 1991 OCR Guidance; 20 U.S.C. § 6841(b)(2)
- Districts must engage in an ongoing evaluation in accordance with OAR (Oregon Administrative Rules) 581-023-0100 (4)(f) Evaluation of program effectiveness in preparing EL students for academic success in the mainstream curriculum.
- Title III requires LEAs (Local Education Agencies) to provide SEAs (State Education Agencies) with an evaluation including, among other things, the number and percentage of children in programs and activities attaining English proficiency at the end of each school year; and SEAs to use. 20 U.S.C. § 6841
- School districts are required to evaluate their LIEPs for effectiveness and modify programs that prove to be unsuccessful as outlined in the OCR Memorandum: Developing Programs for English Learners .

District Plan

1. Describe the district's process for evaluating the effectiveness of the district's services to Multilingual English learners. What methods and/or tools do you use to evaluate ELD programming?

   The district evaluates the effectiveness of EL services through data review and classroom observation. Methods include analyzing ELPA results, classroom assessments, literacy and content-area performance, and student growth over time. Teachers conduct regular classroom observations to assess instructional practices and student engagement.

2. Describe who participates in evaluation of services for multilingual learners, including engagement of multilingual students and families in data collection, analysis, and interpretation.

   [District Response]

3. Briefly summarize any areas of concern or priority that have emerged because of program evaluation and share how they are being addressed.

   [District Response]

Resources for Program Evaluation

- Oregon Accelerated Learning Dashboard
- Education Northwest District EL Program Rubric
- See OELA EL Toolkit, Chapter 9 for guidance on evaluating the effectiveness of a district's EL program
- Regional Educational Laboratory (REL) Program Evaluation Toolkit
- IES (Institute of Education Sciences) What Works, "Using Student Achievement Data to Support Instructional Decision Making"
- Office for Civil Rights Program Evaluation

RESOURCES/REFERENCES

Guidance for all sections

- Dear Colleague Letter – January 2015 – this document includes several chapters addressing requirements for supporting English Learners.
- Title III – Non-Regulatory Guidance (2016 & 2019) – these documents address the federal requirements under ESSA. This guidance is separated by topic.
- ESSA Title I and Title III – this is the link to the Elementary and Secondary Education Act (ESEA) as amended by Every Student Succeeds Act (ESSA)
- OELA (Office of English Language Acquisition) Toolkit. This toolkit provides support for each chapter included in the Dear Colleague Letter.
- Office for Civil Rights – Parent Language Rights This document provides information on the documents a parent has the right to receive in languages they can understand. This document aligns with the Dear Colleague Letter.
- Oregon Multilingual Learner Strategic Plan .

c. Superintendent / K-12 Principal Reports

Alsea School District
April 2026 Board Meeting Board Report
Stacy Knudson, Superintendent/K-12 Principal,
Food Service Director + Special Education Director
SUB Athletic Director

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1. Facilities + Transportation

a. Continued campus cleanup
b. Assess and strategize grounds beautification: courtyards, plants, raised beds, upgraded picnic tables and community space
c. Working with WLA on dispatch service contract
d. Coordinating all Co-op travel each week and communicating with families

2. Schedules, Systems and K-12 Programs

- ☐ F-List data and 1:1 meetings with students led by our academic advisor and administration
    - ☐ Critical communications and reteaching of instruction/feedback and reteaching expectations
- ☐ Lora Nickle has been developing Synergy user guide binders for the elementary registrar position, secondary registrar position and state reporting protocols. They include sections clearly articulating step-by-step processes and requirements for these positions. She is developing resources for current and future employees assigned to execute these duties, which builds stability and consistency across all departments. Thank you for going above and beyond!
- ☐ Tutoring - Math
    - ☐ 4th - 6th Wednesdays 3:30-4:30 w/ Ms. Mason
    - ☐ MS and HS scheduled to begin Wednesdays 3:30-5:0 w/ Mr. Schlechter
- ☐ Scheduling all-staff and IA SpEd training with LBLESD for Fall 2026: CPI, How to Read and Execute an IEP in Gen. Ed setting, Differentiated Instruction, IDEA 101 and ASD 101
- ☐ Inflexion Leadership Collaborative work is heating up. Monthly meetings with my mentor have the following action steps:
    - ☐ Community Engagement (beyond the original 13 who participated) via QR Code Flyers will be posted at local businesses until the end of April. We will also resend via Facebook and Remind for those who have not had a chance to give input on shared values and vision for students' post-secondary readiness.
    - ☐ April 13 Staff Workshop 3:30-5:00
    - ☐ April 13 Board Presentation and Call to Action 6:00pm
    - ☐ April 16 Student Voice Workshop for 5th - 12th grade during Advisory Period
    - ☐ Data collection window closes 4/30 to blend all stakeholder input with the robust Strategic Plan for a collective Shared Vision for Alsea SD before the end of the year.
        - ☐ Reminder, we are already operating within this vision, but a formal, collective final product will be completed by the end of 2025-26 academic year.
- ☐ April Advisory Focus: Integrity + Honesty
    - ☐ How to combat degrading communications in the classroom 4/9

- [ ] Grades 5-12: Reflection, discussion, and personal action plan for being effective upstander in society for a safe + inclusive environment
- [ ] Continuous Intervention Team Meetings - monthly - serving WRAP for our highest needs
- [ ] Edmentum's online presence is growing for our middle and high school students. Kayla, Lora and Heather are doing an excellent job managing and coordinating these services to maintain family enrollment with our district.
- [ ] Exciting and promising interviews are underway with several new hires in preparation for 2026-2027.
    - [ ] Dean of Students
    - [ ] Special Education teacher (district-wide)
    - [ ] CTE instructor
    - [ ] Athletic Director
- [ ] Positions with interviews approaching:
    - [ ] Varsity head boys' basketball coach
    - [ ] Middle school assistant football coach
    - [ ] Middle School teacher

3. Fiscal

- [ ] Budget season deadline was met - final document completed 4/8/26 for the 4/14 publication date.
    - [ ] Huge thanks to our team for their input, teamwork and execution on this critical work
- [ ] Plan to freeze spending May 10th in order to accurately estimate and plan our EFB and 2026-27.

4. Discipline Data (March 1 - 31)

22 Tracker incidents Mid-March - Mid-April *v. 11- Tracker incidents - February*

Inappropriate language	Defiance	Disruption	PhysicalAggression/ Unsafe Behaviors
14% v *9%*	32% v. *45%*	50% v *45%*	4% v *0%*

Minors - March

GRADE	K	1	2	3	4	5	6
Defiance	8	0	1	4	2	9	6
Disruption	11	0	3	2	1	9	4
Language	0	0	1	1	0	1	1
Physical	4	0	9	2	3	5	1
K-5 Total	23	0	14	9	6	24	12

GRADE	7	8	9	10	11	12	K-12 Total
Defiance/Disrespect	23	13	3	3	5	3	50

Disruption	9	7	2	6	5	0	29
Inappropriate behavior	5	4	2	6	4	1	22
Language	15	0	2	2	5	0	24
Physical	9	0	1	0	1	0	11
7-12 Total	65	24	8	17	21	4	

Majors - March to April

3 - ISS Secondary (JFCF or repeated tracker patterns - incidents)

4 - OSS (JFCF policy violations and JFCG policy violations)

5. Attendance Data

Summary

Student Population = 217

Grade	100%	90-99%	80-89%	70-79%	60-69%	50-59%	49%
KG	5	3	3	2	1	0	1
1st	4	0	1	2	0	0	1
2nd	5	1	3	1	0	1	0
3rd	10	7	5	4	0	0	0
4th	11	10	6	2	0	0	0
5th	9	3	5	5	2	0	0
6th	11	7	6	1	0	0	0
7th	2	4	4	2	1	1	0
8th	2	3	5	0	0	0	1
9th	5	5	2	2	1	0	0
10th	4	4	2	1	1	0	0
11th	4	4	4	2	0	1	2
12th	1	0	4	4	0	0	1
	73	**51**	**50**	**28**	**6**	**3**	**6**

Summary - Building

Student Population = 155

Grade	100%	90-99%	80-89%	70-79%	60-69%	50-59%	49%
KG	2	2	2	1	0	0	0
1st	1	0	0	1	0	0	1
2nd	3	0	3	1	0	1	0
3rd	2	4	3	2	0	0	0
4th	5	4	1	1	0	0	0
5th	5	1	3	3	2	0	0
6th	10	7	3	2	0	0	0
7th	2	4	4	2	1	1	0
8th	2	3	5	0	0	0	1
9th	5	5	2	2	1	0	0
10th	4	4	2	1	1	0	0
11th	4	4	4	2	0	1	2
12th	1	0	4	4	0	0	1
	46	**38**	**36**	**22**	**5**	**3**	**5**

Summary - LaHO

Student Population = 64

Grade	100%	90-99%	80-89%	70-79%	60-69%	50-59%	49%
KG	3	1	1	1	1	0	1
1st	3	0	1	1	0	0	0
2nd	2	1	0	0	0	0	0
3rd	8	3	2	2	0	0	0
4th	6	6	5	1	0	0	0
5th	4	2	2	2	0	0	0
6th	2	0	3	0	0	0	0
	28	**13**	**14**	**7**	**1**	**0**	**1**

6. Professional Development

- ☐ Synergy conference April 11-12 (Stacy, Lora, Kayla)
    - ☐ Meetings in process with LBL to build MTSS, OLR, Observations and a collaborative dashboard within Synergy (This ties into our last component requirement in
- ☐ OSSA - Leadership team planning continues 26-27 small schools conference (Stacy - Board Member)
- ☐ Hungerford Law - training day at Lane ESD
- ☐ PACE Business + Legal Conference April (Stacy, Lora, Roxie)
- ☐ Joint PD w/ Eddyville Hosting Apr 10, 2026 (K-12 and leadership)
- ☐ Statewide OTR - Superintendent Training and Legislative Update PDX - Apr 17, 2026 (Stacy)
- ☐ BSAT Level 1 training - LBCC (Tim)
- ☐ PLC Focus - Vertical Alignment in CORE (ELA, Math, Science, Social Studies) (Alsea Cert. Staff)
- ☐ ORSN - Regional Superintendent and Principal Leadership workshop - May 2026 (Stacy, Heather)
- ☐ Kagan Conference (Instructional Excellence) - FL July 2026 (Chelsey + Brittni + Amber) Teaching workshops to our district staff in August during Inservice.
- ☐ Scheduling 2026-27 PD events re: SpEd as mentioned above
- ☐ Athletic Director conference Friday - Tuesday
    - ☐ Stacy (Saturday through Monday: General leadership sessions, league scheduling 26-27)
    - ☐ Talon (Friday - Tuesday: LTC classes)

Alsea Wolverines' Athletic Dept.

- ☐ MS/HS coach evaluations and meetings nearly complete with plans of action for program growth and development in progress.
- ☐ Coaching positions posted: Plan to have in place and department meetings with our new AD later in May.
- ☐ Currently working with coaches and the league as well as AD's across Oregon to develop competitive schedules for next year. We are also working on scheduling summer league games.
- ☐ I have been actively sharing coaching and athlete training camps for this spring and summer as well as a female athlete leadership conference and a weight training conference this spring.
    - ☐ Currently the VB coaches and team are attending the Leadership Summit this month.
    - ☐
- ☐ Winter Sports Head Coach evaluations and self-evaluations have been distributed this week. The deadline for completion is this week and I will be scheduling those meetings to work through the feedback, celebrate wins and focus on areas for growth.

- [ ] Track and Baseball/Softball are underway! Meets are scheduled on Athletic.net and all schedules are posted on our website. Please note, we do weekly posts on Sunday evening as games get rescheduled often during this season.

7. Community Engagement

1. Health + Wellness Fair - April 16 during Spring Conferences
2. Rebuild of website, school district app (Apptegy) and social media with work guided by Coms director through our Inflexion work and networking strategies.
3. Weekly meetings, trainings and webinars have been attended by Nathan Roberts, Lora Nickle and myself as we migrate and develop our new system.
4. This week we conduct our final sessions for our Shared Vision for Readiness approach and the meaning by the two anchor concepts guided by Inflexion.
5. Promote survey participation by all stakeholders with a due date of April 30 in order to complete the strategic plan for ASD.
3. We are planning our Kindergarten Roundup, MS success orientation and 9th grade on track orientation for May. More details will be provided soon.
4. Our family liaison is also planning our first Board Game event this month. Flyers and messaging are being sent out this week.

i. Enrollment Report

Grade Level	2025-2026 SY										2024-2025 SY									
	9/8	10/1	11/1	12/1	1/1	2/1	3/1	4/1	5/1	6/1	9/1	10/1	11/1	12/1	1/1	2/1	3/1	4/1	5/1	6/1
KG	12	12	13	14	14	14	14	15			13	14	12	13	13	14	13	14	14	14
1st	9	9	9	8	8	8	8	8			13	13	13	12	12	13	12	12	12	12
2nd	10	10	9	10	10	10	10	11			32	33	33	33	33	32	30	30	31	31
3rd	25	26	26	26	26	26	26	26			32	32	31	31	31	31	31	31	31	30
4th	32	32	31	30	31	30	30	30			24	24	22	23	22	23	24	25	27	26
5th	24	24	24	25	25	23	23	24			25	26	26	28	27	30	29	28	28	28
6th	25	25	25	25	25	25	25	25			17	17	17	16	16	17	17	18	17	16
7th	14	14	14	15	15	15	14	14			17	17	17	17	17	16	16	16	16	16
8th	13	13	13	13	13	13	13	12			15	15	15	15	16	16	16	15	15	15
9th	15	15	15	15	15	15	15	15			11	11	10	10	10	10	10	9	9	9
10th	13	13	12	12	12	12	12	12			16	13	16	16	16	16	16	17	17	17
11th	18	18	17	17	17	17	17	17			11	10	10	10	10	10	10	10	10	10
12th	11	11	10	10	10	10	10	10			11	11	11	11	11	11	11	11	11	11
Total ADM	221	222	218	220	221	218	217	219	0	0	237	236	233	235	234	239	235	236	238	235

	2023-2024 SY										2022-2023 SY									
	9/1	10/1	11/1	12/1	1/1	2/1	3/1	4/1	5/1	6/1	9/1	10/1	11/1	12/1	1/1	2/1	3/1	4/1	5/1	6/1
KG	19	18	18	16	16	16	17	17	16	16	58	62	60	61	60	56	55	53	50	49
1st	35	42	39	39	39	40	40	39	39	39	56	66	64	66	64	60	60	58	54	53
2nd	35	36	36	37	37	37	37	37	37	35	42	41	41	45	43	38	36	35	32	30
3rd	28	32	30	29	29	28	28	27	25	26	43	50	54	53	51	46	46	46	45	44
4th	24	25	26	25	25	25	24	24	24	24	37	41	47	47	47	43	42	40	39	39
5th	23	24	26	25	25	24	21	21	18	18	29	32	36	36	36	29	29	26	24	23
6th	13	13	12	12	12	12	13	13	15	15	35	45	49	49	46	43	37	34	34	33
7th	18	20	19	19	18	17	17	17	17	17	44	59	59	61	59	56	56	52	48	41
8th	13	13	13	13	13	13	13	13	13	12	41	51	53	52	50	44	42	42	41	39
9th	20	22	22	23	23	22	20	17	16	16	14	14	13	13	12	12	12	12	13	12
10th	12	12	12	12	12	12	12	12	11	11	17	16	16	16	16	15	15	14	14	13
11th	13	14	13	14	14	14	13	13	13	13	21	21	21	22	20	20	20	19	17	17
12th	13	11	10	10	10	10	10	8	8	8	25	24	22	22	21	20	20	15	14	14
Total ADM	266	282	276	274	273	270	265	258	252	250	462	522	535	543	525	482	470	446	425	407

ENROLLMENT															
Grade	**In building/ LaHO**	**K**	**1**	**2**	**3**	**4**	**5**	**6**	**7**	**8**	**9**	**10**	**11**	**12**	**TOTAL**
As of 9/8/25	In building	7	4	7	12	12	15	21	14	13	15	13	18	11	**162**
As of 9/8/25	Learn at Home	5	5	3	13	20	9	6	0	0	0	0	0	0	**61**
As of 9/8/25	**TOTAL**	**12**	**9**	**10**	**25**	**32**	**24**	**27**	**14**	**13**	**15**	**13**	**18**	**11**	**223**
As of 10/1/25	In building	7	4	7	12	12	15	20	14	13	15	13	18	11	**161**
As of 10/1/25	Learn at Home	5	5	3	14	20	9	5	0	0	0	0	0	0	**61**
As of 10/1/25	**TOTAL**	**12**	**9**	**10**	**26**	**32**	**24**	**25**	**14**	**13**	**15**	**13**	**18**	**11**	**222**
As of 11/1/25	In building	7	4	7	12	12	15	20	14	13	15	12	17	10	**158**
As of 11/1/25	Learn at Home	6	5	2	14	19	9	5	0	0	0	0	0	0	**60**
As of 11/1/25	**TOTAL**	**13**	**9**	**9**	**26**	**31**	**24**	**25**	**14**	**13**	**15**	**12**	**17**	**10**	**218**
As of 12/1/25	In building	7	3	8	12	12	15	20	15	13	15	12	17	10	**159**
As of 12/1/25	Learn at Home	7	5	2	14	18	10	5	0	0	0	0	0	0	**61**
As of 12/1/25	**TOTAL**	**14**	**8**	**10**	**26**	**30**	**25**	**25**	**15**	**13**	**15**	**12**	**17**	**10**	**220**
As of 01/01/26	In building	7	3	8	12	13	15	20	15	13	15	12	17	10	**160**
As of 01/01/26	Learn at Home	7	5	2	14	18	10	5	0	0	0	0	0	0	**61**
As of 01/01/26	**TOTAL**	**14**	**8**	**10**	**26**	**31**	**25**	**25**	**15**	**13**	**15**	**12**	**17**	**10**	**221**
As of 02/1/26	In building	7	3	8	11	12	14	20	15	13	15	12	17	10	**157**
As of 02/1/26	Learn at Home	7	5	2	15	18	9	5	0	0	0	0	0	0	**61**
As of 02/1/26	**TOTAL**	**14**	**8**	**10**	**26**	**30**	**23**	**25**	**15**	**13**	**15**	**12**	**17**	**10**	**218**
As of 03/01/26	In building	7	3	8	11	12	14	20	14	13	15	12	17	10	**156**
As of 03/01/26	Learn at Home	7	5	2	15	18	9	5	0	0	0	0	0	0	**61**
As of 03/01/26	**TOTAL**	**14**	**8**	**10**	**26**	**30**	**23**	**25**	**14**	**13**	**15**	**12**	**17**	**10**	**217**
As of 04/01/26	In building	7	3	8	11	12	14	20	14	12	15	12	17	10	**155**
As of 04/01/26	Learn at Home	8	5	3	15	18	10	5	0	0	0	0	0	0	**64**
As of 04/01/26	**TOTAL**	**15**	**8**	**11**	**26**	**30**	**24**	**25**	**14**	**12**	**15**	**12**	**17**	**10**	**219**
As of 05/01/26	In building														**0**
As of 05/01/26	Learn at Home								0	0	0	0	0	0	**0**
As of 05/01/26	**TOTAL**	**0**	**0**	**0**	**0**	**0**	**0**	**0**	**0**	**0**	**0**	**0**	**0**	**0**	**0**
As of 06/01/26	In building														**0**
As of 06/01/26	Learn at Home								0	0	0	0	0	0	**0**
As of 06/01/26	**TOTAL**	**0**	**0**	**0**	**0**	**0**	**0**	**0**	**0**	**0**	**0**	**0**	**0**	**0**	**0**

ii. Regular Attenders

Regular Attenders >90% Po

2025-26

Grade Level	Oct 1 Enrolled	Average %	Nov 1 Enrolled	Average %	Dec 1 Enrolled	Average %	Jan 1 Enrolled	Average %	Feb 1 Enrolled	Average %	Mar 1 Enrolled	Average %
KG	12	83.33%	13	77.00%	14	50.00%	14	50.00%	14	50.00%	14	50.00%
1st	9	78.00%	9	56.00%	8	62.50%	8	87.50%	8	62.50%	8	62.50%
2nd	10	80.00%	9	67.00%	10	50.00%	10	50.00%	10	50.00%	10	40.00%
3rd	26	54.62%	26	73.00%	26	76.92%	26	76.92%	26	73.08%	26	73.33%
4th	32	78.13%	31	87.00%	30	73.33%	31	77.42%	30	83.33%	30	83.33%
5th	24	87.50%	24	71.00%	25	64.00%	25	56.00%	23	60.87%	23	56.52%
6th	25	72.00%	25	84.00%	25	68.00%	25	72.00%	25	68.00%	25	68.00%
7th	14	86.00%	14	79.00%	15	60.00%	15	60.00%	15	40.00%	14	42.86%
8th	13	84.61%	13	77.00%	13	76.92%	13	84.62%	13	76.92%	13	69.23%
9th	15	93.00%	15	93.00%	15	86.67%	15	80.00%	15	73.33%	15	60.00%
10th	13	92.31%	12	50.00%	12	50.00%	12	50.00%	12	58.33%	12	58.33%
11th	18	66.67%	17	65.00%	17	58.82%	17	58.82%	17	70.59%	17	64.71%
12th	11	36.36%	10	40.00%	10	40.00%	10	30.00%	10	40.00%	10	30.00%
	222	**76.35%**	**218**	**70.69%**	**220**	**62.86%**	**221**	**64.10%**	**218**	**62.07%**	**217**	**58.37%**

2024-25

Grade Level	Oct 1 Enrolled	Average %	Nov 1 Enrolled	Average %	Dec 1 Enrolled	Average %	Jan 1 Enrolled	Average %	Feb 1 Enrolled	Average %	Mar 1 Enrolled	Average %
KG	14	64.29%	12	83.33%	13	61.53%	13	61.53%	14	64.28%	13	53.84%
1st	13	92.31%	13	61.53%	12	50.00%	12	41.66%	13	38.46%	12	41.67%
2nd	33	78.78%	33	78.78%	33	69.69%	33	69.69%	32	75.00%	30	83.33%
3rd	32	81.25%	31	80.64%	31	74.19%	31	74.19%	31	70.97%	31	74.19%
4th	24	62.50%	22	63.63%	23	60.86%	22	50.00%	23	69.57%	24	58.33%
5th	26	73.07%	26	80.76%	28	67.85%	27	62.96%	30	60.00%	29	51.72%
6th	17	70.59%	17	58.82%	16	43.75%	16	37.50%	17	35.29%	17	41.18%
7th	17	82.35%	17	76.47%	17	70.58%	17	64.71%	16	62.50%	16	62.50%
8th	15	80.00%	15	80.00%	15	80.00%	16	62.50%	16	81.25%	16	68.75%
9th	11	54.54%	10	50.00%	10	50.00%	10	50.00%	10	60.00%	10	50.00%
10th	16	93.75%	16	81.25%	16	81.25%	16	75.00%	16	68.75%	16	68.75%
11th	10	70.00%	10	70.00%	10	60.00%	10	60.00%	10	60.00%	10	60.00%
12th	11	36.36%	11	45.45%	11	36.69%	11	36.36%	11	36.36%	11	45.45%
	239	**72.29%**	**233**	**70.05%**	**235**	**62.03%**	**234**	**57.39%**	**239**	**60.19%**	**235**	**58.44%**

ısitive Attendance

April 1 Enrolled	Average %	May 1 Enrolled	Average %	June 1 Enrolled	Average %
15	53.34%				
8	50.00%				
11	54.55%				
26	65.39%				
30	70.00%				
24	50.00%				
25	72.00%				
14	42.86%				
12	41.67%				
15	66.67%				
12	66.67%				
17	47.06%				
10	1.00%				
219	**52.40%**				

April 1 Enrolled	Average %	May 1 Enrolled	Average %	June 1 Enrolled	Average %
14	50.00%	14	50.00%	14	57.14%
12	41.67%	12	41.67%	12	41.67%
30	70.00%	31	70.97%	31	70.97%
31	77.42%	31	77.42%	30	83.33%
25	60.00%	27	59.26%	26	61.54%
28	57.14%	28	64.29%	28	75.00%
18	44.44%	17	47.06%	16	43.75%
16	62.50%	16	68.75%	16	68.75%
15	80.00%	15	80.00%	15	80.00%
9	55.55%	9	55.56%	9	44.44%
17	70.59%	17	76.47%	17	70.59%
10	50.00%	10	50.00%	10	50.00%
11	36.36%	11	36.36%	11	36.36%
236	**58.13%**	**238**	**59.83%**	**235**	**60.27%**

d. Business Manager Report

April 13th 2026

To: Alsea School District Board of Directors

From: Stephanie Lewis, Alsea School District

RE: Financial Statements for fiscal year

2026 – 2026 Board Members,

Attached are the financial statements through March 31st 2026. The reports include:

- General Fund Statement of Revenues – Budget vs. Actual
- General Fund Statement of Expenditures – Budget vs. Actual
- Total Appropriations for the year
- Summary of Other funds

Fiscal Year 2025–26

For July 1 through March 31st 2026, actual revenues and expenditures show an estimated Ending at Fund Balance of $5,845,179. Of this total, $5,467,217 is set aside as Contingency and Unappropriated Ending Fund Balance, with a remaining balance of $377,962.

Updates

Budget season is heavily underway. We have been working tirelessly to prepare a budget for Alsea School for the 26-27 fiscal year. The proposed budget will be ready on time for the budget meeting on April 21st 2026.

This paragraph is pulled forward from last month with no changes.

There is good news to report from Salem as the March Revenue Forecast was presented to the legislative revenue committees. Net General Fund and Lottery resources are up $286.5 million from the December Forecast. By Team COSA's estimate, this means that a projected $750 million General Fund deficit has dipped below $500 million, and could be lower as budget pictures become clearer. Additionally, legislative Democrats released their plan to "disconnect" from the federal tax code this week. If passed as introduced, it would net about $300 million in additional General Fund revenue for the 2025-27 biennium. The

legislation will be in Senate Bill 1507, which had a hearing this morning in the Senate Committee on Finance and Revenue. Here’s a link to a good explanation of what’s in the plan: Democrats Disconnect Plan. To reiterate: the projected Net General Fund and Lottery Resources for the 2025-27 biennium have increased by $286.5 million from the December 2025 forecast. Right now, there is no personal or corporate kicker projected in the 2027-29 biennium. One additional area to keep a close eye on: the Corporate Activity Tax (CAT), which funds the Student Success Act programs, has increased by $17.9 million since the December Forecast. The Legislature kept a $100 million CAT reserve for 2025-27, so projected collections are still in positive territory (we estimate around $80 million in reserve).

As of March 31st 2026, Alsea's investments total $8,227,221.94 in the Local Government Investment Pool, earning an annualized interest rate of 4.00%, no change from last month.

Please don't hesitate to reach out with any questions or concerns about these statements.

Alsea School District General Fund: Statement of Revenues Budget Vs. Actual For the Fiscal Year 2025-2026

Source	Budget 2025-2026	Actual YTD Rev. 3/31/2026	Projected through 6/30/2025	Total Estimated 2025-26	(Over)/Under Budget	Budget 2024-25	Actual YTD Rev. 6/30/2025
SSF Funding							
1111 Current Year Property Taxes	540,000	**518,734**	14,704	533,438	6,562	528,200	521,781
1112 Prior Year's Property Taxes	4,000	**11,181**	819	12,000	(8,000)	1,000	4,743
1114 Payment in Lieu of Poperty Taxes	-	**6**		6		-	17
1190 Penalties & Interest on Investments	1,000	**(3,429)**	4,359	930		800	744
2101 County School Funds	-	**-**	-	-	-	-	7,284
3101 State School Support Funds	4,306,158	**3,520,325**	557,774	4,078,099	228,059	4,527,702	4,224,638
3101 SSF - Due to/from ODE FY24/25			24,379	24,379	(24,379)		-
3103 Common School Fund	32,225		32,241	32,241	(16)	41,205	40,053
Total SSF Funding	4,883,383	4,066,213	634,276	4,700,489	182,831	5,098,907	4,799,260
Total SSF Revenue	**$ 4,883,383**	**$ 4,066,213**	**$ 634,276**	**$ 4,700,489**	**$ 182,831**	**$ 5,098,907**	**4,799,260**
Non State School Support Formula Sources							
Local Sources							
1312 Tuition From Other Districts	-	**-**	-	-	-	-	23,153
1510 Earnings on Investments	250,000	**240,217**	72,283	312,500	(62,500)	50,000	388,401
1710 Admissions/Fees	7,500	**4,003**	(253)	3,750	3,750	7,500	3,272
1910 Rentals	5,484	**4,275**	935	5,210	274	3,600	4,036
1920 Donations from Private Sources	-	**-**	-	-	-	-	2,000
1943 Serv Provided to Charter School	76,128	**43,476**	26,806	70,281	5,847	72,198	66,653
1960 Recovery of Prior Year Expenditures		**-**	-	-	-		23,325
1990 Miscellaneous Local Revenue	24,800	**6,713**	15,607	22,320	2,480	24,800	24,786
1991 Miscellaneous ERATE	-	**-**	-	-	-	6,500	
Total Local Sources	363,912	**298,684**	115,377	414,061	(50,149)	164,598	535,627
							-
Intermediate Sources							
2102 Revenue through ESD	7,100	**6,404**	161	6,565	535	7,600	7,027
2800 HERT- Rev. in Lieu of Property Tax	-	**50**		50	(50)	7,600	7,027
Total Intermediate Sources	7,100	6,454	161	6,614	486	7,600	7,027
State/Federal Sources							
4200 Unrestrecited Fed		**871**		871			
Total State/Federal Sources	-	**871**	**-**	871	-	-	-
		-					
Other Sources							-
5300 Sale/Loss of Fixed Assets	-	**-**			-	-	38,582
5400 Beginning Fund Balance	6,700,000	**6,465,781**		6,465,781	234,219	670,000	6,716,065
Total Other Sources	6,700,000	**6,465,781**	**-**	6,465,781	234,219	670,000	6,754,647
		-					-
Total Non SSF Revenue	**$ 7,071,012**	**$ 6,771,789**	**$ 115,538**	**$ 6,887,327**	**$ 184,556**	**$ 842,198**	**$ 7,297,301**
Total Resources	**$ 11,954,395**	**$ 10,838,002**	**$ 749,814**	**$ 11,587,816**	**$ 367,386**	**$ 5,971,105**	**$ 12,096,562**
		Less Estimated Requirements		**$ 5,742,637**			
		Estimated Ending Fund Balance		***$ 5,845,179***			
		Less Contingency & UEFB		***$ 5,467,217***			
		Estimated Ending Fund Balance		***$ 377,962***			

Alsea School District General Fund: Statement of Expenditures Budget Vs. Actual For the Fiscal Year 2025-2026

Function	Budget 2025-2026	Actual YTD EXP 3/31/2026	Projected through 6/30/2025	Total Estimated 2025-26	(Over)/ Under Budget	% Committed	Budget 2024-25		Actual YTD Exp. 6/30/2025
Instruction									
1111 Elementary, K-5 or K-6	1,325,301	**637,408**	489,098	1,126,506	198,795	85%	1,336,914		1,061,403
1113 Elementary Extracurricular	3,808	**338**	3,217	3,554	254	93%	3,864		3,607
1121 Middle/Junior High Programs	298,438	**203,651**	195,274	398,925	(100,487)	134%	271,397	#	256,296
1122 Middle/Junior High School Extracurricular	51,539	**33,776**	18,499	52,275	(736)	101%	36,686		37,210
1131 High School Programs	477,973	**237,789**	215,897	453,686	24,287	95%	390,968	#	344,368
1132 High School Extracurricular	141,006	**99,912**	11,665	111,578	29,428	79%	149,995		112,017
1250 Programs for Students w/Severe Disabilities	452,386	**222,043**	162,485	384,528	67,858	85%	636,673		361,496
1291 English Second Language Programs	4,679	**978**	418	1,396	3,283	30%	8,359		1,436
Total Instruction	**$ 2,755,130**	**$ 1,435,895**	**$ 1,096,552**	**$ 2,532,447**	**$ 222,683**		**$ 2,834,856**		**2,177,833**
		-							
Support Services									
2113 Social Work Services	4,963	**3,093**	2,084	5,177	(214)		-		5,201
2114 Student Accounting Services	28,784	**21,242**	8,234	29,476	(692)	102%	28,801		29,494
2134 Nurse Services	12,000	**10,095**	105	10,200	1,800	85%	12,000		8,325
2142 Psychological Testing Services	50,200	**2,559**	11,038	13,596	36,604	0%	50,200		13,596
2152 Speech Pathology Services	50,450	-	17,023	17,023	33,427	34%	65,900		22,236
2160 Other Student Treatment Services	45,500	-	30,928	30,928			39,500		26,850
2190 Service Directions, Student Support Svcs	83,946	**53,407**	26,577	79,984	3,962	95%	82,526		61,818
2210 Improvement of Instruction Services	-	-	-	-			-		155
2222 Library/Media Center	1,250	-	-	-	1,250	0%	1,250		-
2230 Assessment and Testing	4,288	**2,785**	1,429	4,214	74	98%	4,368		4,292
2240 Instructional Staff Development	26,000	**1,757**	2,868	4,625	21,375	18%	26,000		4,625
2310 Board of Education	159,731	**46,622**	12,686	59,308	100,423	37%	161,200		59,853
2321 Office of the Superintendent Services	246,266	**170,166**	71,687	241,854	4,412	98%	266,441		261,667
2410 Office of the Principal Services	544,864	**332,037**	185,584	517,621	27,243	95%	502,660		435,304
2520 Fiscal Services	334,305	**215,687**	85,188	300,875	33,431	90%	355,450		247,060
2540 Operation & Maintenance of Plant Services	615,454	**349,028**	130,294	479,322	136,132	78%	609,241		470,276
2550 Student Transportation Services	1,017,695	**573,632**	309,613	883,245	134,450	87%	1,009,576		876,199
2660 Technology Services	93,751	**93,257**	26,885	120,142	(26,391)	128%	117,316		62,335
Total Support Services	**$ 3,319,447**	**$ 1,875,367**	**$ 922,221**	**$ 2,797,588**	**$ 507,501**		**$ 3,332,429**		**$ 2,589,285**
Other Requirements									
5200 Transfers of Funds	412,601	-	412,601	412,601	-	100.00%	963,407		896,402
6000 Contingency	500,000	-	-	-	500,000	100.00%	500,000		
7000 Unappropriated Ending Fund Balance	4,967,217	-	-	-	4,967,217	100.00%	4,333,913		
Total Other Requirements	**$ 5,879,818**	**$ -**	**$ 412,601**	**$ 412,601**	**$ 5,467,217**		**$ 5,797,320**		**$ 896,402**
Total Requirements	**$ 11,954,395**	**$ 3,311,262**	**$ 2,431,375**	**$ 5,742,637**	**$ 6,197,400**	**$ -**	**$ 11,964,605**		**$ 5,663,521**

Alea School District Appropriations: Budget Vs. Actual For the Fiscal Year 2025-2026

	Appropriations	YTD	Encumbrances	Totals	Resolutions	(Over)/Under Budget
General Fund						
1000 Instruction	$ 2,755,130	**$ 1,435,895**	**$ 897,276**	$ 2,333,171		$ 421,959
2000 Support Services	$ 3,319,447	**$ 1,875,367**	**$ 573,907**	$ 2,449,274		$ 870,173
5200 Transfers	$ 412,601	**$ -**	**$ -**	$ -		$ 412,601
6000 Contingency	$ 500,000			$ -		$ 500,000
Sub Total	**$ 6,987,178**	**$ 3,311,262**	**$ 1,471,183**	**$ 4,782,445**		**$ 2,204,733**
Special Revenue Funds						
1000 Instruction	$ 714,554	**$ 299,203**	**$ 163,990**	$ 463,193		$ 251,361
2000 Support Services	$ 450,872	**$ 95,500**	**$ 44,935**	$ 140,434		$ 310,438
3000 Community Services	$ 271,297	**$ 110,669**	**$ 76,768**	$ 187,437		$ 83,860
5100 Debt Service	$ 91,230	**$ 91,228**	**$ -**	$ 91,228		$ 2
Sub Total	**$ 1,527,953**	**$ 596,600**	**$ 285,692**	**$ 882,292**		**$ 645,661**
Debt Service Fund						
5100 Debt Service	$ 100,000	**$ 30,000**	**$ 70,000**	$ 100,000		$ -
Sub Total	**$ 100,000**	**$ 30,000**	**$ 70,000**	**$ 100,000**	**$ -**	**$ -**
Facility Funds						
4000 Facilities Acquisition	$ 3,040,000	**$ 2,575,183**	**$ 7,563**	$ 2,582,745		$ 457,255
Sub Total	**$ 3,040,000**	**$ 2,575,183**	**$ 7,563**	**$ 2,582,745**		**$ 457,255**
Internal Service Funds						
2000 Support Services	$ 272,192	**$ 10,255**	**$ -**	$ 10,255		$ 261,937
Sub Total	**$ 272,192**	**$ 10,255**	**$ -**	**$ 10,255**		**$ 261,937**
Total Appropriations	$ 11,927,323	$ 6,523,300	$ 1,834,437	$ 8,357,737		$ 3,569,586
Total Unappropriated	$ 4,996,838	$ -	$ -	$ -		$ 4,996,838
TOTAL	**$ 16,924,161**	**$ 6,523,300**	**$ 1,834,437**	**$ 8,357,737**		**$ 8,566,424**

Fund	Description	Budget	7/1/2025 Beginning Fund Balance	YTD Revenue	YTD Expenditures	Encumbrances	Balance Projected 6/30/26
200	Donations	59,200	**2,730**	**10,000**	**14,930**	**500**	(2,700)
203	Title 1A	45,861	**-**	**13,279**	**19,289**	**16,204**	(22,214)
205	Small Rural School Achievement	31,898	**-**	**3,550**	**3,550**	**2,958**	(2,958)
206	Title III-A Immigration Grant	224	**-**	**-**	**-**	**-**	-
207	Pre-Employment Transition Prog	45,000	**-**	**20,218**	**20,218**	**-**	-
208	E-Rate Funds	26,355	**150**	**-**	**-**	**-**	150
210	IDEA, Part B611	58,652	**-**	**3,322**	**-**	**-**	3,322
216	IDEA, Part B619	401	**0**	**0**	**0**	**0**	-
220	Title V-B Reap	20,981	**-**	**17,064**	**17,184**	**-**	(120)
226	Early Indicator Intervention	806	**0**	**1,158.88**	**1,158.88**	**0**	-
227	Early Literacy Grant	61,481	**-**	**27,160**	**38,196**	**23,880**	(34,916)
228	After School Programs	3000	**0**	**0**	**0**	0	-
248	Federal School Improvement Fur	36,264	**-**	**-**	**21,401**	**14,863**	(36,264)
251	Student Investment Account	329,307	**-**	**246,980**	**185,180**	**109,732**	(47,932)
252	High School Success	71,199	**-**	**53,399**	**45,698**	**29,114**	(21,413)
253	Vision Screening	500	**0**	**0**	**0**	**0**	-
256	Carl Perkins	5,200	**-**	**-**	**3,979**	**-**	(3,979)
257	Baseball/Softball Program	3,750	**3,707**	**-**	**-**	**-**	3,707
259	Student Activity Funds	89,500	**52,184**	**19,794**	**22,421**	**95**	49,462
263	Forest Camp M99	13,698	**-**	**-**	**2,585**	**11,579**	(14,164)
265	Menstrual Dignity	900	**0**	**0**	**0**	**0**	-
272	Tap Seismic		**-**	**-**	**-**	**-**	
290	Bus Replacement Fund	296,219	**162,159**	**61,852**	**91,228**	**-**	132,783
298	Nutrition Services Grants	15,096	**-**	**522**	**1,077**	**11,775**	(12,330)
299	Nutrition Services	253,201	**-**	**66,446**	**108,504**	**64,992**	(107,050)
							-
310	Debt Service - 2021 Issue	129,621	**34,838**	**98,473**	**30,000**	**70,000**	33,311
							-
400	Capital Projects Funds	980,000	**376,601**	**5,018**	**149,793**	**-**	231,826
410	Bond 2021/OSCIM Grant	60,000	**50,936**	**-**	**50,936**	**-**	-
430	Seismic Rehabilitation Grant	2,000,000	**514,425**	**1,852,665**	**2,374,454**	**7,563**	(14,927)
610	Unemployment Reserve Fund	240,192	**181,161**	**2,780**	**10,255**	**-**	173,686
620	PERS Reserve	32,000	**32,981**	**513**	**-**	**-**	33,494
							-
	Grand Total	**$ 4,910,506**	**$ 1,411,873**	**$ 2,504,193**	**$ 3,212,037**	**$ 363,255**	**$ 340,774**

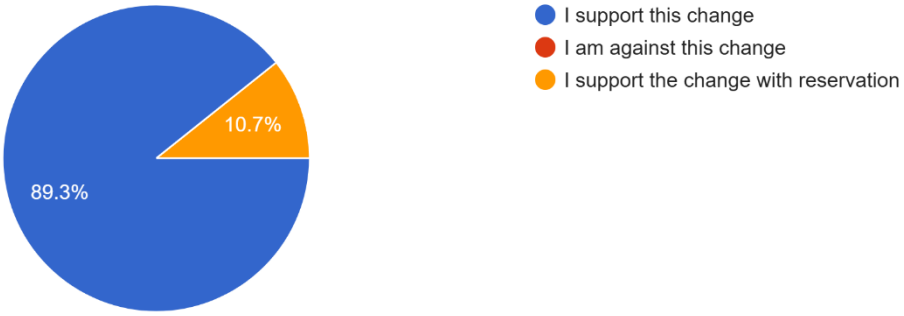
5. **New Business**

a. 6th grade - Middle School Planning

Middle School Planning Follow-Up Survey

Thank you for your participation in the MS Planning Survey. There was overwhelming support for the movement of 6th grade into our middle school program, while some concerns still need addressed.
This follow-up survey is intended to gather feedback based on the following plan details that were missing:
1. MS and HS lunch periods will be separate.
2. There will be a MS success course for 6th grade.
3. We will hold a MS Orientation this spring for our incoming 6th grade students and an additional one Fall 2026.
4. The schedule would be designed as a typical secondary schedule, periods 1-7 and advisory.
5. This does not remove a teacher, rather the elementary teacher transitions to a middle school teacher.
6. Master schedule will be rebuilt to accommodate instructional needs for MS and HS assignments.

Indicate your position on the move of 6th grade into the middle school.
28 responses



Overall Sentiment on Moving 6th Grade to Middle School

- Feedback reflects strong overall support for moving 6th grade to the middle school, with many stakeholders describing the change as a positive and forward-thinking decision. Respondents frequently noted that the shift better aligns with students' developmental stage and will help prepare them for high school through increased academic rigor, access to electives, and opportunities to build independence, responsibility, and time management skills.
- There is also appreciation for the planning and supports being put in place, with several comments recognizing the importance of structure, student movement throughout the day, and expanded programming. Many expressed optimism about long-term benefits for both students and staff.
- Some concerns were identified, primarily related to transition challenges for the first cohort, including academic readiness, social-emotional adjustment, and ensuring appropriate supports are in place. Specific considerations include supervision during shared spaces (e.g., lunch and passing times), clear communication and implementation of IEP accommodations across multiple teachers, and the need to prepare 5th grade students more intentionally for this shift. Suggestions were also made to build a strong middle school identity through dedicated staff collaboration and student activities. Though, limited in responses, upper classmen have shared their opposition to adding more middle level students to their setting but happy to hear they have separate lunch periods.
- Overall, sentiment is highly supportive, with an understanding that careful implementation, proactive supports, and ongoing monitoring will be key to ensuring a successful transition.

b. 25-27 HSS Eligibility Review

25-27 HSS Eligibility Review Findings

Thank you for taking the time to discuss High School Success Eligibility Requirements with us. Below are the findings from our team.

For recipients who did not meet all eligibility requirements in Round 2, you will have one more opportunity to meet with us for review this fall (2026). If eligibility is not fully in place after three opportunities then a grantee will move into corrective action and a portion of their HSS funds will be directed to support meeting eligibility. We will be in touch to schedule next steps in late summer. Thank you!

Alsea SD 7J			
Eligibility Requirements			
Teacher Collaboration Around Data *Fully in Place*	**Systems Ensuring On-Time Graduation** *Not Yet Fully in Place*	**Practices to Reduce Chronic Absenteeism** *Fully in Place*	**Equitable Assignment to Advanced Coursework** *Fully in Place*

Review Date: March 18, 2026		
Eligibility Area	Notes	Action Steps
Teacher Collaboration Around Data	• **Met via data**	• **None**
Systems Ensuring On-Time Graduation	• The school shared how they used data on course credit attainment to revitalize their special education department and Title services; both of which are now better able to provide direct support and interventions to students.	• Demonstrate how the newly developed system (Synergy) allows for the district/school to document parent/caregiver involvement in: ○ tracking progress toward on-time graduation, ○ course selection, ○ and the creation/updating of the

		student's Education Plan and Profile.
Practices to Reduce Chronic Absenteeism	• The school shared that they have monthly intervention meetings where student data is reviewed and needed support and interventions are identified and these are tracked for effectiveness.	• **None**
Equitable Assignment to Advanced Coursework	• The school shared that they are working on adjustments to the master schedule that would allow their teaching staff more opportunities to teach advanced courses.	• **None**

Review Date:		
Eligibility Area	Notes	Action Steps
Teacher Collaboration Around Data	• **Met via data**	• **None**
Systems Ensuring On-Time Graduation	• School data review led to the creation of a Math Support class for students. • Students have a variety of opportunities to explore potential career and post-secondary options through YouScience and site visits.	• Demonstrate evidence of a system where school staff ensure students who are emerging bilinguals, as well as those who are a part of other focal populations, are enrolled in appropriate credit-bearing courses that meet graduation requirements. • Demonstrate evidence of a system for the district or school to document parent/caregiver involvement in: ○ tracking progress toward on-time graduation, ○ course selection, ○ and the creation/updating of the student's Education Plan and Profile.

		● Demonstrate evidence of a plan to improve outreach to families/caregivers to increase involvement for students whose support systems have not yet engaged. ● Demonstrate evidence of a system to regularly review on-track status for focal student populations, to identify patterns or trends in course or subject area pass rates and requirements for meeting essential skills.
Practices to Reduce Chronic Absenteeism	● The Superintendent has created multiple opportunities for students, families and community members to engage with the school including the new Superintendent's Advisory team and conducting casual meet and greet experiences in the community.	● Demonstrate evidence of a system for staff to conduct analysis of attendance data to identify patterns across student focal groups to flag potential system barriers. ● Demonstrate evidence of a system where staff review implementation of attendance supports for effectiveness and make adjustments as needed.
Equitable Assignment to Advanced Coursework	● Students have the ability to take advanced coursework both at the school as well as through the local community college.	● Demonstrate evidence of a system where families and caregivers, students, counselors, and other school staff are collectively involved and given a voice in decisions about advanced and dual credit coursetaking and where benefits of taking advanced courses are included in the conversation.

6. **Old Business**
7. **First Reading *(Shaded words are new/strikethroughs are deleted)**
8. **Second Reading**
9. **Board Comments**
10. **Future Agenda Items**
11. **Key Dates**

April 15 & 16, Parent-Teacher Conferences
April 16, Health and Wellness Fair
April 20 - 24, Outdoor School
April 22, Red Cross Blood Drive
April 23, Alsea School Board - Executive Session. 6:00 PM
April 28, Kindergarten Roundup event, 4:00 - 5:30 PM
April 30, Peaceful Luminaries
May 4 - 8, Staff Appreciation Week
May 6, 6th grade success & 9th grade on track event
May 8, Teacher Work Day, No School
May 9, Prom
May 11, School Board Meeting, 6:00 PM
May 27, Senior Banquet (Tentative)