



Board of Directors
 North Clackamas School District 12
 12400 SE Freeman Way
 Milwaukie, Oregon 97222

Agenda

North Clackamas School Board
 Thursday, December 7, 2023 6:30 PM
 Board Room/YouTube
 12400 SE Freeman Way
 Milwaukie, OR 97222

Times listed on the agenda below are only estimates and may be adjusted.

OPEN SESSION

6:30	Call to Order	
	Community Comments	
	Native Land Acknowledgement	3
	Flag Salute	4
	Minutes - November 9, 2023	5
	Consent Agenda	
	A. Employment Changes	
8	B. Oregon School Boards Association Election - Board of Directors Position	8
	C. Oregon School Boards Association Election - Resolution 1	14
	D. Oregon School Boards Association Election - Resolution 2	25
	E. Budget Committee Position Number Correction	47
7:05	1. North Clackamas Education Association (NCEA) Featured Educator	
7:15	2. Linwood Elementary - School Presentation	48
	Presenter: Patricia Ahrens	
7:40	3. Board Reports	
7:55	4. Year End Financial Report	67
	Presenter: Matt Makara	
8:05	5. Quarterly Financial Report	71
	Presenter: Matt Makara	
8:10	6. Policy Revisions - Discussion	75
	Presenter: Tiffany Shireman	

8:15	7. Determining Election Results of Local Option Levy Measure - Discussion/Action	87
	Presenter: Tiffany Shireman	
8:20	8. Student Success Act: Student Investment Account Grant Agreement - Discussion/Action	90
	Presenter: Ivonne Dibblee	
8:50	9. Superintendent Evaluation Process - Discussion/Action	134
	Presenter: Jena Benologa	
8:55	10. Math Pathways - Report	140
	Presenter: Tammy O'Neill	
9:25	Adjourn	



Native Land Acknowledgment

We acknowledge the land on which we sit and which we call the North Clackamas School District rests on the traditional and indigenous lands and village sites of the Native peoples of the Kalapuya, Chinook, Molalla, and the Clackamas. We take this opportunity to offer gratitude for the ability to learn, work, and be a community on this land, and we offer thanks to the original caretakers of this region. We recognize the historic policies of colonization, genocide, relocation, and assimilation that affected Indigenous and Native families both past and present and that will affect those in the future, and honor the resilience and revitalization of our Indigenous and Native communities. We pay our respects to the Elders, both past and present, who have been the stewards of this land throughout the generations.



Flag Salute

I pledge allegiance to the Flag of the United States of
America, and to the Republic for which it stands, one Nation
under God, indivisible, with liberty and justice for all.

Employment Changes - Approve employment changes as listed, with a copy of the list made as part of the official minutes, as recommended by the Executive Director of Human Resources:

- Administrator appointments and leaves
- Licensed appointments, leaves, and terminations

Travel Permission Request -

- Grant permission for 13 students from Rex Putnam High School to travel to Dallas, TX, January 18-22, 2024.

Travel Permission Request -

- Grant permission for 12 students from Sabin-Schellenberg Professional Technical Center to travel to Otis, OR, December 7-10, 2023.

Motion passed unanimously, 5-0.

North Clackamas Education Association (NCEA) Featured Educator – Oak Grove Elementary teacher Paul Sheprow and NCEA Representative Melinda Ryan, recognized Whitney Nash, School Psychologist, as the NCEA Featured Educator of November.

School Presentation: Alder Creek Middle School- Executive Director of Secondary Programs Petra Callin, Principal of Alder Creek Middle School Kelli Rhea, Assistant Principal of Alder Creek Middle School Chanel Muñoz, teacher Linda Stoll, and counselor Gabby Rosales gave a presentation on Alder Creek Middle School. The presentation included school mission and vision, cultural identity, creativity and rigor, family engagement, and dual language program. Questions and comments from the Board were addressed.

Human Resources Hiring Update - Report – Executive Director of Human Resources Michelle Riddell, Associate Director of Recruitment, Retention and Strategic Initiative Keylah Boyer, Associate Director of Human Resources Alma Morales Galicia, and Associate Director of Human Resources Will Ruehle gave an update on licensed, classified, and administrative hiring for the 2023-24 school year. Questions and comments from the Board were addressed.

North Clackamas Education Foundation Update - Report - Executive Director of North Clackamas Education Foundation Stephanie Rose gave an update for the 2023-24 school year. Questions and comments from the Board were addressed.

Oregon School Board Association Election - Discussion - the Board discussed the Oregon School Boards Association (OSBA) ballot items.

R23/24-29

Easements for Bilquist Elementary School - Discussion/Action – Kathy Wai moved, Mitzi Bauer seconded the motion to approve resolution to dedicate to Clackamas

County the easements for the purpose of road and walkway improvements for Bilquist Elementary located at 15708 SE Webster Road, as shown in Exhibits A, B, and C.

Motion passed unanimously, 5-0.

Budget Committee Appointments -

R23/24-30 Mitzi Bauer nominated Simona Beattie for Position 8 on North Clackamas School District's Budget Committee.

Nomination passed unanimously, 5-0.

R23/24-31 Kathy Wai nominated Jennifer Pope for Position 11 on North Clackamas School District's Budget Committee.

Nomination passed unanimously, 5-0.

R23/24-32 The Board voted on appointing Ankur Doshi from the Educational Equity Advisory Committee for Position 14 on North Clackamas School District's Budget Committee.

Appointment passed unanimously, 5-0.

There being no further business to come before the Board, the meeting adjourned at 8:37 p.m.

Unapproved

OREGON SCHOOL BOARDS ASSOCIATION ELECTION
BOARD OF DIRECTORS POSITION 8

CONSENT B
December 7, 2023

SUPERINTENDENT’S RECOMMENDATION:

This time is provided to allow the Board to vote on the Oregon School Boards Association (OSBA) ballot items.

- OSBA Board Position 8 – Chrissy Reitz (only candidate)

ORIGINATED BY:

Annual OSBA Election, vote from Board due by December 15, 2023.

BUDGET IMPACT/SOURCE OF FUNDS:

There are no fiscal impacts to the district as a result of the proposed resolutions.

BACKGROUND:

Founded in 1946, Oregon School Boards Association is governed by a member-elected board and serves K-12 public school boards, public charter school boards, education service district boards, community college boards and the State Board of Education. Through legislative advocacy at state and federal levels, board leadership training, employee management assistance and policy, legal and financial services, OSBA helps locally-elected volunteers fulfill their complex public education roles.

As a member of the OSBA, the NCSB Board of Education is eligible to participate in the election of officers to the OSBA Board and the Legislative Policy Committee, and to vote on resolutions that amend the OSBA Constitution or adopt legislative priorities.

The Board may consider ballot items separately and may decline to vote on any of them. After the Board has taken action(s) on the candidates, the Board Secretary will submit the vote via the OSBA on-line ballot.

ATTACHMENTS:

- A. OSBA 2023 Official Clackamas Region Ballot
- B. Candidate Nomination Form, Questionnaire and Personal/Professional Resume for OSBA Board of Directors Position 8 – Chrissy Reitz (only candidate)

PRESENTER:

Board Chair, Jena Benologa



Dedicated to improving student success and education equity through
advocacy, leadership and service
 to Oregon public school boards.



Election - OSBA 2023 - Clackamas Region (07 08)

2023 OSBA Election

*** 1. Board of Directors Position 7**

Vote

No candidate filed for Board of Directors Position 7

*** 2. LPC Position 7**

Vote

No candidate filed for Legislativ Policy Committee Position 7

*** 3. Board Position 8 (Vote for one)**

- Chrissy Reitz, Hood River County
- Abstain
- No action taken

*** 4. LPC Position 8**

Vote

No candidate filed for Legislativ Policy Committee Position 8

*** 5. Resolution 1 - Creates the Oregon Rural School Board Members Caucus and designate a seat on the OSBA Board of Directors and Legislative Policy Committee**

- Yes - adopt
- No - do not adopt
- Abstain
- No action taken

*** 6. Resolution 2 - Adopts the proposed amendments to the OSBA Bylaws**

- Yes - adopt
- No - do not adopt
- Abstain
- No action taken

*** 7. Type the name of the district, ESD, or community college board that officially made this vote.**

*** 8. Type the meeting date when the board officially made this vote.**

*** 9. Type your name and title.**

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NOMINATION FORM OSBA BOARD OF DIRECTORS REGIONAL MEMBER

Date: 9/13/2023

TO: Sami Al-Abdrabbuh, OSBA President-Elect
Oregon School Boards Association
1201 Court St NE, #400
Salem, OR 97301
Fax: 503-588-2813
E-mail: OSBAelections@osba.org

**Nominations are due by 5 pm,
September 29, 2023**

Return this form and all candidate information forms to the OSBA office by email at OSBAelections@osba.org, or mail to Oregon School Boards Association, 1201 Court St. NE, #400, Salem, OR 97301

Dear Sami Al-Abdrabbuh:

With this letter, our board nominates the candidate named below to a position on the OSBA Board of Directors for the Clackamas Region, Position # 8.

BOARD CANDIDATE INFORMATION

Name: Chrissy Reitz
District/ESD/Community College: Hood River County School District
Address: 1420 Sunset Rd
City: Hood River Oregon ZIP: 97031
E-mail: chrissy.retiz@hoodriver.k12.or.us Phone: 503-381-8024

This nomination was approved by official action of our board of directors at a duly called meeting on 9/13/2023
(date)



(Board Chair signature)

Board Chair name: Chrissy Reitz
District: Hood River County
Address: 1011 Eugene St
City, State, Zip: Hood River, OR, 97031

OSBA Board of Directors CANDIDATE QUESTIONNAIRE

Name: Chrissy Reitz

Date: 9/18/2023

Address: 1420 Sunset Rd

City/Zip: Hood River, OR, 97031

Business phone: 541-386-2511 - District

Residence phone: 503-381-8024

Cell phone: 503-381-8024

E-mail: chrissy.reitz@hoodriver.k12.or.us

District/ESD/CC: Hood River County School District

Term expires: 6/2027 Years on board: 8

Region: Clackamas

Position #: 8

Insert your high-resolution digital photo (head shot):
1) Open this PDF in Adobe
2) Click on Tools tab
3) Click Edit PDF
4) Click on Add Image
5) Navigate to where photo is
6) Position photo in this frame

I certify that if elected I will faithfully serve as a member of the OSBA Board of Directors. My nomination form has been submitted to OSBA (or is attached to this document) as evidence.


Name

9/18/23
Date

Be brief; please limit your responses to 50 words per question.

1. Describe in your own words the mission and goals of OSBA.
To support the work of public school boards in Oregon through education and advocacy with the goal of ensuring opportunities for all students throughout the state.

2. What do you want to accomplish by serving on the OSBA board of directors?
I hope to continue to be a voice for the unique needs of rural communities and districts. To be a strong advocate for the importance of public education and sufficient funding for all aspects of our education system. I am also interested in exploring innovative ways that our education system can adapt to the ever-changing needs and learning styles of our current and future students.

3. What leadership skills do you believe you bring to the board of directors? Give an example of a situation in which you demonstrated these skills.
I am an effective communicator, highly organized, and passionate about education. I ran for the State Senate 5 years ago and spent the better part of a year traveling the district talking about the need for a strong public education system accessible to all Oregon families.

OSBA Board of Directors

CANDIDATE PERSONAL/PROFESSIONAL RESUME

Work or service performed for OSBA or local district (include committee name and if you were chair):

OSBA Legislative Policy Committee
OSBA Rural Districts Advisory Committee
OSBA Board of Directors, Position 8
Hood River County School District Chair
Other education board positions held/dates:

Hood River County Education Foundation Board Liaison 2016-present
Oregon School Activities Association Board of Directors 2023

Occupation (Include at least the past five years):

Employers:	Dates:
Pistil Designs LLC	11/2021-6/2023

Schools attended (Include official name of school, where and when):

High school: Air Academy HS, Colorado Springs, CO 1987-1988, 1989-1991

College: University of Colorado, Boulder, CO 1991-1995/ University of Kansas Medical Center, K

Degrees earned: CU: Bachelor of Arts, Biology/ KUMC: Bachelor of Science, Nursing

Education honors and/or awards:

AAHS: National Honor Society
AAHS: Graduate with Honors

Other applicable training or education:

Activities, other state and local community services:

1. Founder- Gorge Kids Triathlon
2. Board Member-Gorge Performing Arts Initiative
3. Past Board Member- Providence Center for Medically Fragile Children
4. Past Board Member- New Parent Services, Next Door Inc.
5. Volunteer- Hood River Shelter Services
6. Volunteer- Music Festival of the Gorge

Hobbies/special interests:

Cooking, Reading, Running, Hiking

Business/professional/civic group memberships; offices held and dates:

Additional comments:

**OREGON SCHOOL BOARDS ASSOCIATION ELECTION
RESOLUTION 1**

CONSENT C
December 7, 2023

SUPERINTENDENT’S RECOMMENDATION:

This time is provided to allow the Board to vote on the Oregon School Boards Association (OSBA) ballot items.

- Resolution 1 - Creates the Oregon Rural Board Members Caucus and designates a seat on the OSBA Board of Directors and Legislative Policy Committee

ORIGINATED BY:

Annual OSBA Election, vote from Board due by December 15, 2023.

BUDGET IMPACT/SOURCE OF FUNDS:

There are no fiscal impacts to the district as a result of the proposed resolutions.

BACKGROUND:

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ATTACHMENTS:

- A. OSBA 2023 Official Clackamas Region Ballot
- B. Resolution to Amend Oregon School Boards Association’s Bylaws Relating to Composition of the Board of Directors

PRESENTER:

Board Chair, Jena Benologa



Dedicated to improving student success and education equity through
advocacy, leadership and service
 to Oregon public school boards.



Election - OSBA 2023 - Clackamas Region (07 08)

2023 OSBA Election

*** 1. Board of Directors Position 7**

Vote

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*** 2. LPC Position 7**

Vote

No candidate filed for Legislativ Policy Committee Position 7

*** 3. Board Position 8 (Vote for one)**

- Chrissy Reitz, Hood River County
- Abstain
- No action taken

*** 4. LPC Position 8**

Vote

No candidate filed for Legislativ Policy Committee Position 8

*** 5. Resolution 1 - Creates the Oregon Rural School Board Members Caucus and designate a seat on the OSBA Board of Directors and Legislative Policy Committee**

- Yes - adopt
- No - do not adopt
- Abstain
- No action taken

*** 6. Resolution 2 - Adopts the proposed amendments to the OSBA Bylaws**

- Yes - adopt
- No - do not adopt
- Abstain
- No action taken

*** 7. Type the name of the district, ESD, or community college board that officially made this vote.**

*** 8. Type the meeting date when the board officially made this vote.**

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**Resolution to Amend Oregon School Boards Association’s
Bylaws Relating to Composition of the Board of Directors**

WHEREAS, the Oregon School Boards Association (OSBA) was formed in 1946 as a volunteer association of locally elected public school boards and transitioned to a nonprofit corporation under Oregon Revised Statute Chapter 65 as of July 1, 2018; and

WHEREAS, the Oregon Rural School Board Advisory Committee has been active and publicly supported by OSBA’s Board of Directors since April 22, 2022; and has developed a mission statement and goals; and has established bylaws; and

WHEREAS, the Advisory Committee is ready to elect officers and their Rural Leadership Assembly; and

WHEREAS, the Advisory Committee has articulated its mission as follows: “To build collaborative relationships and promote quality education for all students with emphasis on the unique needs of school boards and students in rural communities.”

WHEREAS, OSBA’s Board of Directors recognizes the importance of the Advisory Committee's value and mission; and

WHEREAS, the Advisory Committee has respectfully requested that the Board of Directors submit a resolution to the membership creating the Oregon Rural School Board Members Caucus and designate a seat on the OSBA Board of Directors and Legislative Policy Committee.

THEREFORE, BE IT RESOLVED by the OSBA Board of Directors that the proposed bylaws amendment designating a Caucus representative as a voting member of the OSBA Board of Directors and Legislative Policy Committee be submitted to the membership for consideration during the 2023 OSBA election; and

BE IT FURTHER RESOLVED that the bylaws with the proposed amendments and a copy of this resolution be forwarded to all association member boards in accordance with OSBA’s adopted elections calendar.

Submitted by: OSBA Board of Directors

BYLAWS

OREGON RURAL SCHOOL BOARD MEMBERS CAUCUS

OF THE

OREGON SCHOOL BOARDS ASSOCIATION

TABLE OF CONTENTS

		Page
ARTICLE 1	CHARTER	1
ARTICLE 2	MISSION AND GOALS:	1
2.1	Mission	1
2.2	Goals	1
ARTICLE 3	MEMBERSHIP	2
3.1	Qualification	2
3.2	Members	2
3.3	Attendees	2
3.4	Membership List	2
ARTICLE 4	BUDGET	2
ARTICLE 5	MEETINGS	2
5.1	Annual Meetings	2
5.2	Regular and Special Meetings	2
5.3	Notice	3
5.4	Quorum	3
5.5	Organization	3
5.6	Records	3
5.7	OSBA Staff Liaison	3
ARTICLE 6	CAUCUS LEADERSHIP COUNCIL	3
6.1	Composition	3
6.2	Term	3
6.3	Nomination and Election	3
6.4	Designations	3
6.5	Resignation	4
6.6	Vacancies	4
6.7	Removal	4
ARTICLE 7	EXECUTIVE COMMITTEE	4
7.1	Composition	4
7.2	Responsibilities	4
7.3	Ratification	5
7.4	Administration	5
ARTICLE 8	COMMITTEES	5
ARTICLE 9	SEAT ON THE OSBA'S BOARD OF DIRECTORS	5
ARTICLE 10	GENERAL PROVISIONS	5
10.1	Amendment of Charter	5

ARTICLE 1

CHARTER

The Oregon School Boards Association (the "OSBA") exists solely to perform essential governmental functions and all of its income must accrue to the State of Oregon or its political subdivisions as required under IRC Section 115. OSBA's mission is to improve student success and education equity through advocacy, leadership and service to Oregon public school boards.

OSBA is aware and acknowledges that diversity is a core value of OSBA. OSBA desires to identify areas of concern and causation, convene a caucus of stakeholders, and create a plan to better promote and support the success of rural students.

To this end, The OSBA Board of Directors has formally recognized the Oregon Rural School Board Members Caucus (the "Caucus") to serve as a resource and provide guidance and leadership for these initiatives to the OSBA Board of Directors

The activities of the Caucus shall align with OSBA bylaws as well as complement, not duplicate, OSBA's efforts on behalf of all local governing boards.

ARTICLE 2

NAME, MISSION AND GOALS:

2.1 Name: This organization shall be known as the Oregon Rural School Board Members Caucus of the Oregon School Boards Association (OSBA).

2.2 Mission: To build collaborative relationships and promote quality education for all students with emphasis on the unique needs of school boards and students in rural communities.

2.3 Goals:

2.2.1 To elevate the voice of rural school districts and recognize their unique needs.

2.2.2 To build and maintain collaborative relationships between OSBA and rural school boards.

2.2.3 To develop, promote, and advance legislation supporting rural schools and understand the impact of statewide legislation to each rural community and district.

2.2.4 To build collaborative relationships and promote quality education for all students with emphasis on the unique needs of school boards and students in rural communities.

2.2.5 To support school boards in rural communities by prioritizing professional development of rural board members and bringing training and other resources to rural areas.

ARTICLE 3

MEMBERSHIP

3.1 Qualification. All members must support the purposes and goals of the Caucus as set forth in Article 2.

3.2 Members. The Caucus members may include any elected or appointed member of any public board of education in Oregon who are active members in good standing with the Oregon School Boards Association *and serve a school district with a population density of less than 200 people per square mile and/or total school district population less than 20,000 people.* All board members of Oregon Education Service Districts are eligible to participate in the Rural Caucus. If a school board member or district does not meet the aforementioned qualification but feels they are indeed a rural district, an appeal process will be available as outlined in policy. Caucus members may participate in all discussions, vote, and serve as an officer of the Caucus. Members must attend the meeting in person (or virtually) *to vote. Voting by proxy shall not be permitted.*

3.3 Attendees. The Caucus may, in its discretion, invite to participate in any meeting or event any other individuals who support the purpose and goals of the Caucus as set forth in Article 2.

3.4 Membership List. The Membership list shall be maintained by the Secretary/Treasurer.

ARTICLE 4

BUDGET

4.1 Budget. The Caucus shall submit an annual budget request as outlined under the OSBA budget process, including approval by the OSBA Board of Directors. The request shall set forth the areas of concern, recommended actions, and annual goals.

ARTICLE 5

MEETINGS

5.1 Annual Meetings. An annual meeting of the Caucus shall be in conjunction with the OSBA Annual Convention at which time the Caucus shall elect officers and shall conduct other business as may properly be brought before the meeting of the Caucus.

5.2 Regular and Special Meetings.

5.2.1 Regular Meetings. The Caucus shall meet as often as required to achieve the goals outlined in its annual Work Plan. These meetings shall be scheduled for the year at the Annual Meeting.

5.2.2 Special Meetings. Special meetings of the members for any purpose may be called, either in writing or by e-mail, by the President or by a majority of the Executive Committee. Such a request shall state the purpose or purposes of the proposed meeting.

5.2.3 Place of Meetings. Regular and special meetings of the Caucus shall be held at any location (or virtually) within Oregon as designated by the President or the Executive Committee.

5.3 Notice.

5.3.1 Notice and agenda of every annual meeting, regular or special meeting of members, stating the time and place thereof, shall be posted to the OSBA website, no less than 14 days prior to such meeting.

5.4 **Quorum.** Except as otherwise provided by law, the presence at any meeting of a majority of the Executive Committee shall constitute a quorum.

5.5 **Organization.** The President may determine *in their sole* discretion whether any meeting of the Caucus shall be held in accordance with Robert's Rules of Order.

5.6 **Records.** The President shall see that all correspondence, minutes, agendas, and Charter be sent to and kept on file with OSBA. Minutes from each meeting shall be posted to the OSBA website.

5.7 **OSBA Staff Liaison.** The Executive Director of OSBA shall designate a staff member to serve as a liaison representative to the Caucus. The designee shall not have voting rights.

ARTICLE 6

Rural Leadership Assembly

6.1 **Composition.** The Rural Leadership Assembly of the Caucus shall consist of 9 members, and shall include *one representative from each OSBA district with 10 or more districts defined as rural (Regions 1, 2, 4, 6, 9, and 14), plus 3 at-Large* members. The executive committee (President, Vice-President, Secretary/Treasurer) shall be elected from the body of the Rural Leadership Assembly by the members of the Rural School Board Members Caucus.

6.2 **Terms.** **The Rural Leadership Assembly members shall each serve two-year terms. The President, Vice-President & Secretary/Treasurer shall each serve a one-year term. The President, Vice-President, Secretary Treasurer, Regional Members, and Members-at-Large may serve any number of consecutive terms.** Each officer shall hold office until the term has expired or until a successor has been duly elected and qualified for the position, or until the officer can no longer hold the position because they no longer qualify to be a member of the Caucus as defined in Article 3 above, or because of removal or death.

6.3 Nomination and Election

6.3.1 **Nomination.** Rural Leadership Assembly members may be nominated by either (a) the nominating committee, or (b) a caucus member at the annual meeting.

6.3.2 **Election.** The members shall elect the Leadership Council by majority vote at the annual meeting. Positions 1, 4, 9, and at large #1 shall be elected in even numbered years, and positions 2, 6, 14, at large #2 and at large #3 shall be elected in odd numbered years.

6.4 Designations

6.4.1 **President.** The President shall preside at all meetings of the Caucus and the Executive Committee. The President shall appoint all standing and special committees and shall be an ex officio member of all committees, except the nominating committee, with voting power. The President shall sign all official reports of the Caucus.

6.4.2 Vice President. The Vice President shall have such duties as from time-to-time may be assigned by the Executive Committee, and in the absence of the President, the Vice-President shall have and perform all the powers and duties of the President.

6.4.3 Secretary/Treasurer. The Secretary/Treasurer shall keep the minutes and records and shall see that all notices are duly given in accordance with the provisions of law and this Charter, and such other duties as from time-to-time may be assigned by the Executive Committee. The Secretary/Treasurer shall maintain a roster of the current membership. The Secretary/Treasurer shall have the responsibility for receiving and disbursing all funds related to the Caucus in coordination with the OSBA liaison. The Secretary/Treasurer shall report regularly to the Executive Committee, shall prepare a written yearly financial report to be distributed to the members at each annual meeting, and shall perform other duties assigned by the Executive Committee.

6.5 Resignation. A Leadership Assembly member may resign by filing a written resignation with the President or Secretary/Treasurer of the Caucus or the President of OSBA.

6.6 Vacancies. Any vacancy in any office may be appointed for the unexpired portion of the term by a majority of the Leadership Assembly at the next regular or special meeting.

6.7 Removal. Any member of the Leadership Assembly who misses more than two meetings out of any four consecutive meetings, *unless they are* excused by the Executive Committee for a valid reason, may *have their* position vacated by action of the Leadership Assembly.

ARTICLE 7

EXECUTIVE COMMITTEE

7.1 Composition. There shall be an Executive Committee made up of the President, Vice-President, and Secretary/Treasurer.

7.2 Responsibilities. *The Executive Committee* shall have the following responsibilities and powers:

- (a) To respond to any inquiry or question from OSBA.
- (b) To act on behalf of the Caucus when deemed necessary by the President.
- (c) To review plans and programs to be presented to the Caucus at its meetings.
- (d) *To give direction to the OSBA liaison on legislative action to come before the state legislature on which there is no formal Caucus policy or resolution.*
- (e) Members of the Executive committee will be elected from the Rural Leadership Assembly.

7.3 Ratification. Any actions by the President shall be reported to the Executive Committee as soon as the action has taken place. All actions of the Executive Committee shall be subject to ratification by the Caucus at the next meeting of the members.

7.4 Administration. The Executive Committee shall keep regular minutes of its proceedings and all actions by the Executive Committee shall be reported promptly to the membership. Such actions shall be subject to review by the membership, provided that no rights of third parties shall be affected by such review.

ARTICLE 8

COMMITTEES

The President may establish committees of 2 or more members to serve at the discretion of the President. These committees would consist of such persons and perform such duties as the President designates from time to time; provided, however, that the committees may not act on behalf of the Caucus but may make recommendations to the Caucus for approval. The Chair of any such committee shall be a member of the Leadership Assembly.

ARTICLE 9

SEAT ON THE OSBA’S BOARD OF DIRECTORS AND LEGISLATIVE POLICY COMMITTEE

9.1 The Caucus shall appoint one officer from the Rural Leadership Assembly to serve as liaison to the OSBA Board of Directors and to be a voting member of the OSBA Board of Directors for a two year term. That liaison shall hold all of the rights and responsibilities of a member of the OSBA Board of Directors.

9.2 The Caucus shall appoint one member from the Rural Leadership Assembly to serve on the Legislative Policy Committee for a term of two years.

ARTICLE 10

GENERAL PROVISIONS

10.1 Amendment of Bylaws

10.1.1 Bylaws may be altered, amended, or replaced by a majority vote of the members of the Caucus who are present and voting at the annual meeting.

10.1.2 Notice of proposed bylaws changes shall be in the annual meeting agenda and sent to all members 15 days prior to the annual meeting.

10.1.3 Omissions from this Charter shall be governed by Robert’s Rules of Order, when they do not conflict with the Charter.

The foregoing charter was adopted by the active membership of the OSBA Rural Caucus on (____)month (____) date (____) year.

**OREGON SCHOOL BOARDS ASSOCIATION ELECTION
RESOLUTION 2**

CONSENT D
December 7, 2023

SUPERINTENDENT’S RECOMMENDATION:

This time is provided to allow the Board to vote on the Oregon School Boards Association (OSBA) ballot items.

- Resolution 2 - Adopts the proposed amendments to the OSBA Bylaws

ORIGINATED BY:

Annual OSBA Election, vote from Board due by December 15, 2023.

BUDGET IMPACT/SOURCE OF FUNDS:

There are no fiscal impacts to the district as a result of the proposed resolutions.

BACKGROUND:

Founded in 1946, Oregon School Boards Association is governed by a member-elected board and serves K-12 public school boards, public charter school boards, education service district boards, community college boards and the State Board of Education. Through legislative advocacy at state and federal levels, board leadership training, employee management assistance and policy, legal and financial services, OSBA helps locally-elected volunteers fulfill their complex public education roles.

As a member of the OSBA, the NCSB Board of Education is eligible to participate in the election of officers to the OSBA Board and the Legislative Policy Committee, and to vote on resolutions that amend the OSBA Constitution or adopt legislative priorities.

The Board may consider ballot items separately and may decline to vote on any of them. After the Board has taken action(s) on the candidates, the Board Secretary will submit the vote via the OSBA on-line ballot.

ATTACHMENTS:

- A. OSBA 2023 Official Clackamas Region Ballot
- B. Resolution to Amend the OSBA’s 2018 Bylaws

PRESENTER:

Board Chair, Jena Benologa



Dedicated to improving student success and education equity through
advocacy, leadership and service
 to Oregon public school boards.



Election - OSBA 2023 - Clackamas Region (07 08)

2023 OSBA Election

*** 1. Board of Directors Position 7**

Vote

No candidate filed for Board of Directors Position 7

*** 2. LPC Position 7**

Vote

No candidate filed for Legislativ Policy Committee Position 7

*** 3. Board Position 8 (Vote for one)**

- Chrissy Reitz, Hood River County
- Abstain
- No action taken

*** 4. LPC Position 8**

Vote

No candidate filed for Legislativ Policy Committee Position 8

*** 5. Resolution 1 - Creates the Oregon Rural School Board Members Caucus and designate a seat on the OSBA Board of Directors and Legislative Policy Committee**

- Yes - adopt
- No - do not adopt
- Abstain
- No action taken

*** 6. Resolution 2 - Adopts the proposed amendments to the OSBA Bylaws**

- Yes - adopt
- No - do not adopt
- Abstain
- No action taken

*** 7. Type the name of the district, ESD, or community college board that officially made this vote.**

*** 8. Type the meeting date when the board officially made this vote.**

*** 9. Type your name and title.**

To retain a record of your vote, you MUST print this page before clicking the Done button.



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Resolution to Ammend the OSBA's 2018 Bylaws

WHEREAS, the Oregon School Boards Association (OSBA) was formed in 1946 as a volunteer association of locally elected public school boards; and

WHEREAS, in 2017, through a vote of the Membership, OSBA was incorporated under ORS Chapter 65 to nonprofit status and Bylaws replaced the Constitution.

WHEREAS, in 2018, through a vote of the Membership, the Bylaws were amended to expand the OSBA Board of Directors and the Legislative Policy Committee with representatives from the School Board Members of Color Caucus.

WHEREAS, The Bylaws have not been amended since 2018, the OSBA Board of Directors determined, based on its review of the proposed changes, that it was in the membership's best interest to amend the Bylaws; and

WHEREAS, the following only reflects a high-level overview of the proposed changes, all changes are reflected in the proposed bylaws.

- Clarification of the Membership voting process for both resolutions and bylaw amendments.
- Clarification of an exception to the term limits for the OSBA director serving as immediate past president.
- Clarification of the definition of a quorum for the OSBA Board of Directors.
- Combining the Finance and Budget Committees and outline the terms of the members.
- Adding a Rural School Boards Caucus representative to the Board of Directors and the Legislative Policy Committee (LPC).
- Adding language to reflect the School Board Members of Color Caucus representation on the LPC, which was inadvertently omitted during the 2018 amendment.
- Adding information regarding the PACE Board of Trustees under the Committees and Caucus section of the Bylaws.
- Adding language stating caucuses must comply with OSBA policies/guidelines and adding language to establish the Rural caucus.
- Edits to grammar, punctuation, and language for readability.

WHEREAS, after reviewing the recommended OSBA Bylaws as proposed by staff and legal counsel, the OSBA Board of Directors supports the recommendation to amend the Bylaws:

THEREFORE, BE IT RESOLVED by the OSBA Board of Directors that the proposed Bylaws be submitted to the membership for consideration during the 2023 OSBA election; and

BE IT FURTHER RESOLVED that the proposed Bylaws and a copy of this resolution be forwarded to all member boards of the Association in accordance with the OSBA Board of Directors adopted elections calendar.



BYLAWS

As Amended by the Membership: December 2018

Suggested Revisions: September 23, 2023

TABLE OF CONTENTS

		Page
SECTION 1	PURPOSE	1
SECTION 2	MEMBERS	2
2.1	Admission	2
2.2	Dues	2
2.3	Reserved Powers of the Members	2
2.4	Voting Power	2
2.5	Process of Approval of Member Resolutions	3
2.6	Regional Election of Directors and LPC Members	3
2.7	Modification of Regions.....	4
2.8	Annual Meetings.....	4
2.9	Special Meetings.....	4
2.10	Telephonic/Video Meetings	5
2.11	Place of Meetings	5
2.12	Action by Written Ballot	5
2.13	<u>Quorum</u> Unanimous Written Consent.....	5
2.14	Quorum and Voting	5
SECTION 3	DIRECTORS.....	5
3.1	Powers.....	5
3.2	Qualifications	5
3.3	Number.....	6
3.4	Term.....	6
3.5	Composition.....	6
3.6	Vacancies	7
3.7	Resignation	8
3.8	Removal	8
3.9	Meetings	8
3.10	Notice of Meetings	8
3.11	Waiver of Notice	8
3.12	Quorum and Voting	8
3.13	<u>Voting</u>	<u>8</u>
<u>3.14</u>	<u>Presumption of Assent</u>	<u>8</u>

TABLE OF CONTENTS
(continued)

	Page
3. 14 <u>15</u> Compensation.....	9
3. 15 <u>16</u> Director Conflict of Interest.....	9
SECTION 4 COMMITTEES AND CAUCUSES.....	9
4.1 Standing Committees	<u>9</u>
4.2 Other Board Committees.....	10
4.3 Advisory Committees.....	11
4.4 Caucuses	11
4.5 Administration	11
SECTION 5 OFFICERS OF THE BOARD OF DIRECTORS.....	11
5.1 Appointment.....	11
5.2 Designation	11 <u>12</u>
5.3 <u>Eligibility</u>	<u>12</u>
5.4 Compensation and Term of Office	11 <u>12</u>
5.45 Removal and Resignation	11 <u>12</u>
5.56 Officers.....	12
SECTION 6 NONDISCRIMINATION	13
SECTION 7 GENERAL PROVISIONS	13
7.1 Amendment of Bylaws.....	13
7.2 Inspection of Books and Records.....	13 <u>14</u>
7.3 Checks, Drafts, Etc	13 <u>14</u>
7.4 Deposits	13 <u>14</u>
7.5 Loans or Guarantees.....	13 <u>14</u>
7.6 Execution of Documents.....	13 <u>14</u>
7.7 Insurance	14
7.8 Fiscal Year	14 <u>15</u>
7.9 Severability	14 <u>15</u>

SECTION 1 PURPOSE

~~A.~~ The Oregon School Boards Association (the “Association”) exists solely to perform essential governmental functions and all of its income accrues to the State of Oregon or its political subdivisions as required under IRC Section 115. In particular, the Association’s mission and purpose are as follows:

~~B.A.~~ To work for the general advancement and improvement of the education of all public school children of the State of Oregon.

~~C.B.~~ To gather and disseminate information pertinent to the successful operation of public schools.

~~D.C.~~ To work for the most efficient and effective organization of public schools of this state. “Public schools” include local school districts, education service districts, the State Board of Education and community colleges classified as a political subdivision.

~~E.D.~~ To work for adequate and dependable financial support for the public schools of this state.

~~F.E.~~ To study all legislation which affects the public schools of Oregon and to support and work for that which appears to be desirable and to keep members informed thereof. To propose and work for the enactment of proper educational legislation.

~~G.F.~~ To encourage the establishment and maintenance of best practices and high standards in the conduct and operation of the public school educational system.

~~H.G.~~ To study and interpret educational programs and to relate them to the needs of pupils.

~~I.H.~~ To promote public understanding of the role of school boards and school board members in the improvement of education.

~~J.I.~~ To conduct seminars, conferences, and research projects in the various aspects of education for the benefit of members.

~~K.J.~~ To endeavor to implement the policies, beliefs and resolutions of the Association members and board of directors.

~~L.K.~~ To do such other things as the member boards or board of directors may deem appropriate for the accomplishment of these and other purposes which tend to improve public education.

~~M.L.~~ To enter into such cooperative agreement with members for the pooling of resources and the provision of services as may result in the more efficient utilization of district resources and accrue to their financial advantage.

SECTION 2 MEMBERS

2.1 Admission. All members must qualify as (1) a “political subdivision” as defined under Treas Reg § 1.103-1(b) and Revenue Ruling 78-276, 1978-2 CB 256 and (2) as one of the following:

2.1.1 Local School District as defined under ORS Chapter 332;

- 2.1.2** Education Service District as defined under ORS Chapter 334;
- 2.1.3** Community College District as defined under ORS Chapter 341;
- 2.1.4** State Board of Education as defined under ORS Chapter 326; and
- 2.1.5** Any other governmental educational organization qualifying as a political subdivision, as approved by resolution of the board of directors.

2.2 Dues. Annual dues shall be set by majority vote of the members and shall be based on resident Average Daily Membership (ADMr) as of December 31 of the preceding year as reported to the Oregon Department of Education. Dues shall be payable on July 1 of each year and shall become delinquent on September 1 of each year. Member status shall automatically terminate for members failing to pay dues by September 1 unless an extension is requested and granted by the board of directors.

2.3 Reserved Powers of the Members. The following corporate actions require the consent and approval of the members:

- 2.3.1** Election and removal of directors;
- 2.3.2** Election and removal of the Legislative Policy Committee (“LPC”) members;
- 2.3.3** Approval of resolutions to effectuate any of the following:
 - (a) Adoption, amendment, or restatement of the articles of incorporation or bylaws;
 - (b) Modification to the region descriptions set forth in Section 2.6.1; and the
 - (c) Dissolution, merger, or the sale, pledge, or transfer of all or substantially all of the Association’s assets.

2.4 Voting Power.

2.4.1 Election of Directors and LPC Members. For the purposes of nominating and electing directors and LPC members, each member shall have one vote.

2.4.2 Resolution. For the purposes of approving a resolution, each member shall have one vote on all resolutions except as follows:

- (a) K-12 Local Districts with an ADMr between 15,600 and 23,400 shall have two votes.
- (b) K-12 Local Districts with an ADMr between 23,400.1 and 31,200 shall have three votes.
- (c) K-12 Local Districts with an ADMr between 31,200.1 and 39,000 shall have four votes.

- (d) K-12 Local Districts with an ADMR ~~between of~~ 39,000.1 ~~and above or more~~ shall have five votes.

2.5 Process of Approval of Member Resolutions.

2.5.1 Generally, members shall approve resolutions annually by ballot vote. Members or the board of directors may submit a resolution for member approval. Such resolutions shall be submitted to the board of directors no later than September 30th. The board of directors shall distribute all timely submitted resolutions, together with an official ballot, to the members no later than October 15. Members shall vote by ballot submitted to the board of directors no later than December 15.

2.5.2 The board of directors may call a special meeting of the members under Section 2.9, as necessary.

2.6 Regional Election of Directors and LPC Members

2.6.1 Regional Voting. For the purposes of nominating and electing the board of directors and LPC members, the Association members shall be organized into and represented by region:

- (a) Eastern Region includes all of the members located in the counties of Baker, Grant, Malheur, Union, Wallowa, and Wheeler.
- (b) Gorge Region includes all of the members located in the counties of Gilliam, Morrow, Sherman, Umatilla, and Wasco.
- (c) Central Region includes all of the members located in the counties of Crook, Deschutes, and Jefferson.
- (d) Southeast Region includes all of the members located in the counties of Harney, Klamath, and Lake.
- (e) Southern Region includes all of the members located in the counties of Jackson and Josephine.
- (f) Lane Region includes all of the members located in the county of Lane.
- (g) Clackamas Region includes all of the members located in the county of Clackamas and Hood River.
- (h) Douglas/South Coast Region includes all of the members located in the counties of Coos, Curry, and Douglas.
- (i) Linn, Benton, Lincoln Region includes all of the members located in the counties of Benton, Lincoln, and Linn.
- (j) Marion Region includes all of the members located in the county of Marion.

(k) Yamhill, Polk Region includes all of the members located in the counties of Polk and Yamhill.

(l) North Coast Region includes all of the members located in the counties of Clatsop, Columbia, and Tillamook.

(m) Washington Region includes all of the members located in the county of Washington.

(n) Multnomah Region includes all of the members located in the county of Multnomah.

Members shall be assigned to the region in which their main administrative office is located. If a member's district boundaries span more than one region, the member board must declare which region it intends to vote and shall vote only in that region.

2.6.2 Regional elections shall be taken by majority vote of the members within the region.

2.7 Modification of Regions. A formal review of the regional organizations described in Section 2.6.1 shall be conducted by the board of directors at least every three years commencing with 2017. Any recommended changes to the regional organization shall be submitted to the members in the form of a resolution in accordance with the provisions of Section 2.11.

2.8 Annual Meetings. An annual meeting of members shall be held in November of each year unless a different date or time is fixed by the board of directors and stated in the notice of the meeting. Failure to hold an annual meeting on the stated date shall not affect the validity of any corporate action. At the annual meeting, the president and secretary-treasurer of the board of directors, any other officer or person whom the president may designate, shall report on the state of the Association, the activities and financial condition of the Association.

2.9 Special Meetings. A special meeting of members shall be held upon the call of the president or 25 percent of the board of directors. All members shall be officially notified of a special meeting by written notice, mailed via U.S. mail or electronic mail to all members at least 15 days prior to the date of the meeting. Such notice shall include a description of all agenda items and any matters to be voted upon by the members, the place and time of the meeting, and instructions describing the method by which members can participate by telephone or video. Notice shall also comply with all procedures and include any information as required by ORS Chapter 192.

2.10 Telephonic/Video Meetings. The board of directors may permit any member to participate in an annual or special meeting, or conduct the meetings through, use of any means of communication by which all persons participating may simultaneously hear each other during the meeting. A member participating in the meeting by this means is deemed to be present in person at the meeting.

2.11 Place of Meetings. Meetings of the members shall be held at any place in or out of Oregon designated by the board of directors. If a meeting place is not designated by the board of directors, the meeting shall be held at the Association's principal office.

2.12 Action by Written Ballot. Any action required of the members will be taken by written ballot and or permitted to be taken at a members' meeting may be taken without a meeting if the Association will delivers a written ballot to every member entitled to vote on the matter. ~~A written ballot shall set forth each proposed action and provide an opportunity to vote for or against each proposed action. Approval by written ballot shall be valid only when the number of votes cast by ballot equals or exceeds a quorum of the members, and the number of approvals equals or exceeds the number of votes that would be required to approve the matter at a meeting at which the total number of votes cast is the same as the number of votes cast by ballot. A written ballot shall set forth each proposed action, indicate the number of responses needed to meet the quorum requirements, state the percentage of approvals necessary to approve each matter, and specify a reasonable time by which a ballot must be received by the Association in order to be counted. Once delivered, a written ballot may not be revoked.~~

~~**2.13 Unanimous Written Consent.** Any action required or permitted to be taken at a members' meeting may be taken without a meeting if the action is taken by all members entitled to vote on the matter. The action shall be evidenced by one or more written consents describing the action taken, signed by each member, and included in the minutes or filed with the corporate records reflecting the action taken. Action taken under this section is effective when the last member entitled to vote on the matter signs the consent, unless the consent specifies an earlier or later effective date.~~

~~**2.13 Quorum and Voting.** A quorum of the members shall consist of those votes represented at a meeting of the members. If a quorum is present when a vote is taken, the affirmative vote of a majority of the votes represented and voting when the action is taken is the act of the members except to the extent that the articles of incorporation, these bylaws, or applicable law require the vote of a greater number of members. A quorum of the members shall consist of a majority of members in good standing at the time the ballots are to be returned to the association.~~

~~**2.1.4 Approval:** With the exception of approving amendments to the Association's bylaws, which is outlined in Section 7.1 of these bylaws, approval by written ballot is effective when:~~

~~2.14.1 The number of votes cast by ballot equals or exceeds a quorum of the members;
and~~

~~2.1.4.2 The number of approvals equals or exceeds a majority of the number of returned ballots.~~

SECTION 3 DIRECTORS

3.1 Powers. Except as provided under Section 2.2, all corporate powers shall be exercised by or under the authority of and the affairs of, are managed under the direction of a-the board of directors. The board of directors shall adopt policies defining specific obligations of the board of directors.

3.2 Qualifications. Directors must serve on the board of a member of the Association throughout the duration of their term, with the exception of the director serving as past president.

3.3 Number. The board of directors shall consist of not fewer than three nor more than 24-25 persons. The number of directors may be fixed or changed periodically, within the minimum, and maximum by the members.

3.4 Term. Directors shall take office on January 1 and shall serve for a term of two calendar years or until their successors are elected and qualified. Terms shall be staggered as per the election calendar.

3.4.1 Directors who took office prior to January 1, 2018, and are re-elected may serve for any number of terms as long as they continuously remain members of the board of directors.

3.4.2 Directors taking office on or after January 1, 2018, may serve five consecutive two-year terms and, if eligible, may rerun after a two-year hiatus.

3.4.3 If a director serving as immediate past an officer/president requires additional time beyond the term limits outlined above, the term limits will be held in abeyance to allow the director to complete their term as immediate past president.

3.5 Composition. The board of directors will be comprised of up to 23 regionally elected directors, one designated director as defined in the bylaws of the Oregon School Board Members of Color Caucus, one designated director as defined in the bylaws of the Oregon Rural School Boards Caucus and ex-officio nonvoting members as delineated in Section 3.5.4.

3.5.1 Regional Elected Directors. Each region, as described under Section 2.6.1, shall elect one director except as follows:

- (a) Clackamas Region shall elect two directors;
- (b) Marion Region shall elect two directors;
- (c) Washington Region shall elect three directors; and
- (d) Multnomah Region shall elect three directors.
- (e) Provided, however, that if the president or immediate past president of the board of directors is a representative director from a region that elects only one director, that region shall elect an additional director or directors to serve for the duration of the president and/or the immediate past president's term.

3.5.2 Regional Election. The nomination and election of directors shall be in accordance with the elections calendar annually adopted by the board. Each regional candidate for a director position shall be nominated by a member within the region by means of a nomination form. The board of directors shall distribute notice of position vacancies, candidate information packets, and official nomination forms to all incumbent directors and members in electing regions. To nominate a director candidate, one or more of the members in the region must timely submit to the board of directors a formal resolution or motion of the member and the completed nomination form(s). Nominations in regions where there is more than one open director position shall indicate the numbered position for which the nomination is being submitted. Each member in a region shall have one vote in the regional elections for the board of directors. The director candidate receiving a majority of the votes of the members shall be elected. In cases where there are more than two candidates nominated for any position, and none receives a majority of the votes cast, a second ballot

shall be required between the two candidates receiving the highest number of votes; the one receiving a majority of the votes is elected.

3.5.3 Designated Representative. ~~In accordance with their bylaws, caucuses of OSBA, The Oregon School Board Members of Color Caucus~~ shall appoint an officer a representative of the Caucus to serve as a director of the Association. The ~~appointee, as defined in the Caucus bylaws~~ representative must, shall be an elected or appointed member of any public board of education in Oregon who is an active member in good standing with the Association. All Association bylaws and policies shall apply to the designated representative serving as the Caucus' director of the Association.

3.5.4 Ex-Officio. The following individuals or their designee may serve as ex-officio nonvoting advisors to the board of directors:

- (a) Any director of the National School Boards Association elected from Oregon;
- (b) Any officer of the National School Boards Association, National School Boards Advocacy Committee, or an officer of the NSBA Pacific Region.
- (c) The immediate past president of the Oregon Association of School Executives;
- (d) The immediate past president of the Confederation of School Administrators;
- (e) The board section president of the Oregon Association of Education Service Districts;
- (f) The board section president of the Oregon Community College Association;
- (g) The chair of the State Board of Education; and
- (h) Any other person as the board of directors may appoint.

3.6 Vacancies. In the event that any director position₇ other than the immediate past president is vacant during the term of office, the remaining directors may appoint an interim director from the same region to serve until December 31 of the same year. If the board of directors cannot recruit a candidate from the region₂, they may appoint a person from a contiguous region to serve as director representing the open region. An individual appointed as a director from a contiguous region is not eligible to serve as an officer of the board. The members shall elect, using the procedures in Section 3.5.2, an interim director to serve from January 1 of the next year until the end of the remaining term. If there is a vacancy in an OSBA caucus-designated director position~~the Members of Color Caucus' director position~~, then the ~~Caucus-caucus~~ shall, as set forth in Section 3.5.3, appoint a new Caucus caucus officer-representative to serve the remaining term.

3.7 Resignation. A director may resign at any time by delivering written notice to the president or the secretary. A resignation is effective when notice is effective under ORS 65.034 unless the notice specifies a later effective date. Once delivered, a notice of resignation is irrevocable unless revocation is permitted by the board of directors.

3.8 Removal. A director may be removed for cause by vote of two-thirds majority of the directors. A director may be removed with or without cause by a majority vote of the members who elected the director. The board may provide guidance or adopt and amend policies regarding what types of actions the board considers to be sufficient cause for removal.

3.9 Meetings. An annual meeting of the board of directors shall be held immediately after, and at the same place as, the annual meeting of members. If the time and place of any other directors' meeting is regularly scheduled by the board of directors, the meeting is a regular meeting. All other meetings are special meetings. A special meeting of the board of directors may be called by the president or the president-elect or 20 percent of the board of directors. The board of directors may hold annual, regular or special meetings at any location in ~~or out of~~ the State of Oregon.

3.10 Notice of Meetings. All members shall be officially notified of a special meeting by written notice delivered personally, by telephone or electronic mail to all directors at least 48 hours prior to the date of the meeting. Such notice shall include a description of all agenda items and any matters to be voted upon by the directors, the place and time of the meeting, and instructions describing the method by which directors can participate by telephone or video. Notice shall also comply with all procedures and include any information as required by ORS Chapter 192.

3.11 Waiver of Notice. A director may at any time waive any notice required by these bylaws. A director's attendance at or participation in a meeting waives any required notice to the director of the meeting unless the director, at the beginning of the meeting or promptly upon the director's arrival, objects to holding the meeting or transacting business at the meeting and does not thereafter vote for or assent to any action taken at the meeting. Except as provided in the preceding sentence, any waiver must be in writing, must be signed by the director entitled to the notice, must specify the meeting for which the notice is waived, and must be filed with the minutes or the corporate records.

~~**3.12 Quorum and Voting.** A quorum of the board of directors shall consist of a majority of the number of directors in office immediately before at the time the meeting begins. If a quorum is present when a vote is taken, the affirmative vote of a majority of the directors present when the action is taken is the act of the board of directors except to the extent that the articles of incorporation, these bylaws, or applicable law require the vote of a greater number of directors.~~

~~**3.123.13 Voting:** If a quorum is present when a vote is taken, the affirmative vote of a majority of the directors present when the action is taken is the act of the board of directors except to the extent that the articles of incorporation, these bylaws, or applicable law require the vote of a greater number of directors.;~~

~~**3.133.14 Presumption of Assent.** A director who is present at a meeting of the board of directors when corporate action is taken is deemed to have assented to the action taken unless:~~

- (a) The director objects at the beginning of the meeting, or promptly upon the director's arrival, to holding the meeting or transacting the business at the meeting; and
- (b) The director's dissent from the action taken is entered in the minutes of the meeting.

3.143.15 Compensation. Directors and members of committees may receive reimbursement of such expenses as may be determined by resolution or policy of the board of directors to be just and reasonable. Directors shall not otherwise be compensated for service in their capacity as directors.

3.153.16 Director Conflict of Interest. The Association shall maintain a Conflict of Interest policy the terms of which comply with ORS 65.361 and ORS Chapter 244. The board of directors shall annually review and notify its members and directors of the current Conflict of Interest policy. Each director shall annually complete and return a Conflict of Interest statement.

SECTION 4 COMMITTEES AND CAUCUSES

4.1 Standing Committees. The board of directors shall maintain the standing committees described below:

4.1.1 Executive Committee. The executive committee shall consist of five officers of the board of directors: the president as chairman, the president-elect, the vice president, the secretary-treasurer and the immediate past president. The executive committee may act, pursuant to delegation of authority to such committee by the board of directors, in place and instead of the board of directors between board meetings on all matters except those specifically reserved to the board under the terms of the bylaws. Actions of the executive committee shall be reported to the board by mail, email or at the next board meeting.

4.1.2 Finance Committee. The finance committee shall be appointed by the president and shall be composed of members from Oregon public school districts, education service districts, and community colleges with boards that meet all criteria to be Association voting members. The members shall include, but are not limited to, the Association secretary/treasurer and vice president, one Association board director from the PACE board, one district business official and one at-large board member. ~~The finance committee shall operate within the guidelines of the corporation's investment policy and the Finance Committee Operating Manual.~~

(a) Finance committee members serve for a term of two (2) years unless they are appointed to replace a member who left the committee before finishing their two-year term, in which case the member will serve the remainder of the two-year term.

(b) The finance committee shall operate within the guidelines of the corporation's investment policy guidelines and the Finance Committee Operating Manual Guidelines.

4.1.24.1.3 Legislative Policy Committee. The board of directors shall maintain a Legislative Policy Committee (LPC).

(a) Purpose. The LPC shall develop legislative policies which are recommended to and approved by the members as a resolution proposed by the board of directors and voted on by the membership in accordance with Section 2.4. The LPC also advises the executive director and staff during legislative sessions.

(b) Composition. The LPC shall be composed of the voting members of the board of directors and the regional representatives elected under the procedures defined in 4.1.3(c) and (d) and one designated voting member as defined in the bylaws of the Oregon School Board Members of Color Caucus and the Oregon Rural School Boards Caucus. All committee members must be elected or appointed directors of a member. The vice president of the ~~board~~board of directors shall chair the LPC.

(c) Nomination. The board of directors shall cause the nomination form to be distributed to all members in eligible regions. A member may nominate a candidate to the LPC and shall do so by formal resolution of the member and timely submission of the nomination form(s) to the office of the Association. Nominations in regions where there is more than one representative position shall indicate the numbered position for which the nomination is being submitted. Nominations will be closed by a date identified in the elections calendar adopted by the board.

(d) Election. Each LPC member shall be elected by majority of member boards of a region. Each region shall elect the number of LPC members as described in Section 3.5, without regard to Section 3.5.1(d). Such elections shall be held using the procedures described in Section 3.5.2.

~~(e)~~ Term. Each committee member shall take office on January 1 in even numbered years and serve for a term of two (2) years.

Vacancies. In the event that there is a vacancy on the LPC, the board of directors may appoint an interim LPC member from the same region to fill the unexpired term of office. If the board of directors cannot recruit an LPC member from the region, they may appoint a person from a contiguous region to serve to represent the open region to fill the unexpired term of office.

4.1.4 PACE Trustees: The board of directors shall appoint the trustees of the OSBA Property and Casualty Coverage for Education Trust ("PACE"). As per the PACE bylaws Restated Trust Agreement, the PACE trustees shall nominate trustee candidate(s) to the OSBA board of directors. The nominees shall be elected by the OSBA Board of Directors. If the list of candidates is not acceptable by the board of directors, the PACE trustees will continue to submit nominated candidate(s) for consideration until accepted by the board of directors.

(a) PACE Trustees taking office on or after January 1, 2023, may serve three consecutive three-year terms and, if eligible, may return after a one-year hiatus.

4.2 Other Board Committees. The board of directors may create one or more committees of the board of directors and appoint directors and representatives of members to serve on such committee. The creation of a committee and the appointment of directors and member representatives to the committee must be approved by a majority of all directors in office when the action is taken. The provisions of these bylaws governing meetings, action without meetings, notice and waiver of notice, and quorum and voting requirements of the board of directors shall apply to committees and their members as well. Committees of the board of directors may, to the extent specified by the board of directors, exercise the authority of the board of directors; provided, however, that no committee of the board of directors may:

- (a) Authorize distributions, provided that this restriction does not apply to payment of value for property received or services performed or payment of benefits in furtherance of the Association’s purposes;
- (b) Approve or recommend dissolution, merger, or the sale, pledge, or transfer of all or substantially all of the Association’s assets;
- (c) Elect, appoint, or remove directors or fill vacancies on the board or on any of its committees; or
- (d) Adopt, amend, or repeal the articles of incorporation or bylaws.

4.3 Advisory Committees. The board of directors may create one or more other committees. Members of these committees need not be members or directors, but at least one director shall serve on each such committee. These committees shall have no power to act on behalf of, or to exercise the authority of, the board of directors, but may make recommendations to the board of directors.

4.4 Caucuses. Caucuses shall exist to enhance the work of the Association by addressing the unique needs of member districts. Caucuses shall:

4.4.1 Clearly articulate the vision, mission and goals of the Caucus.

4.4.2 Adopt bylaws for operating, programming and governing within the context of the Association bylaws described herein.

4.4.3 Comply with Association policies and guidelines.

4.4.3.4.4 Caucuses shall be added or eliminated to this provision through the amendment process described in these bylaws.

4.4.5 With the adoption of this section, the The Oregon School Board Members of Color Caucus is was established by a vote of the membership in 2018.

4.4.5 With the adoption of this sections, the Oregon Rural School Boards Caucus is established.

4.5 Administration. Each committee and caucus shall prepare minutes of each of its meetings, and such minutes shall be kept on file at the Association’s principal office and made available on request to any member of the board of directors. Each committee and caucus shall also report on its activities at the regular meetings of the board of directors. Each committee and caucus shall comply with the public meetings laws requirements under ORS Chapter 192.

SECTION 5 OFFICERS OF THE BOARD OF DIRECTORS

5.1 Appointment. The board of directors shall elect officers by majority vote at least 10 days prior to the November member meeting. In cases where there are more than two candidates nominated for any position, and none receives a majority of the votes, a second ballot shall be

required between the two candidates receiving the highest number of votes. The one receiving a majority of the votes is elected.

5.2 Designation. The officers of the Association shall be a president, president-elect, past president, vice president, a secretary-treasurer, and such other officers as the board of directors may appoint.

5.3 Compensation and Term of Office. Officer terms are one calendar year. No officer except the secretary-treasurer shall serve two consecutive terms in the same office unless the director completed a term for another officer who was unable to complete a term and is then voted into the same position the following year. The secretary-treasurer may serve up to two consecutive one-year terms. Directors and members of committees may receive reimbursement of such expenses as may be determined by resolution of the board of directors to be just and reasonable. Directors shall not otherwise be compensated for service in their capacity as directors.

5.4 Removal and Resignation. Any officer may be removed, either with or without cause, at any time by action of the board of directors. An officer may resign at any time by delivering notice to the board of directors, the president, or the secretary-treasurer. A resignation is effective when the notice is effective under ORS 65.034 unless the notice specifies a later effective date. If a resignation is made effective at a later date and the Association accepts the later effective date, the board of directors may fill the pending vacancy before the effective date if the board of directors provides that the successor does not take office until the effective date. Once delivered, a notice of resignation is irrevocable unless revocation is permitted by the board of directors. No removal or resignation shall prejudice the rights of any party under a contract of employment.

5.5 Officers. The officers of the Association are as follows:

5.5.1 President: The president shall preside at all member meetings of the Association and of the board of directors; shall appoint, committees subject to the approval of the board of directors; shall call all regular and special meetings as provided herein; shall be ex-officio voting member of all committees. The president shall automatically serve as immediate past president for the following term. The president serves for a term of one calendar year.

5.5.2 President-elect: In the absence of the president, the president-elect shall assume the powers and duties of the president, and when a vacancy occurs in the office of president, shall serve in that capacity for the remainder of the term. The president-elect shall automatically serve as president for the following term, even if required to fill an uncompleted term as president. In addition, the president-elect shall assume duties related to the oversight of Association member elections and resolutions processes and such other administrative duties as are assigned by the president. The president-elect serves for a term of one calendar year.

5.5.3 Vice president: In the absence of the president-elect shall assume the powers and duties of the president-elect. The vice president shall also serve as the chair of the LPC. The vice president serves for one calendar year.

5.5.4 Secretary-treasurer: The secretary-treasurer shall be responsible for keeping in a suitable minute book accurate minutes of all board of director meetings; shall carry on official correspondence of the Association; shall arrange for proper banking facilities; and shall receive, account for and disburse funds in a businesslike manner as provided for by the board of directors; shall see that the minutes of the previous meetings are read, and shall give an itemized and detailed report of the financial condition of the Association at each annual meeting and at such other times as may be required by the board of directors. Such duties of the secretary-treasurer as may be specified by the board of directors may be delegated to the executive director or a designated member of the staff. The secretary-treasurer serves for a term of one calendar year.

5.5.5 Immediate past president: The immediate past president shall advise and counsel with other officers. The immediate past president chairs the officer succession planning process. The past president serves for one calendar year.

5.5.6 Assistants: The board of directors may appoint or authorize the appointment of an assistant to the secretary-treasurer. Such assistant may exercise the powers of the secretary-treasurer, as the case may be, and shall perform such duties as are prescribed by the board of directors.

SECTION 6 NONDISCRIMINATION

The Association shall not discriminate in providing services, hiring employees, or otherwise, upon the basis of gender, race, creed, marital status, sexual orientation, religion, color, age, disability, or national origin.

SECTION 7 GENERAL PROVISIONS

7.1 Amendment of Bylaws.

7.1.1 Amendments to the bylaws may be initiated by the board of directors or submitted by a member to the board of directors. ~~Amendments must be approved by a vote of two-thirds majority of the members at any regular or special meeting. The board of directors shall provide written notice to the members containing a statement that the members will be asked to approve the amendment and a copy of the proposed amended bylaws. Such notice shall be provided by US mail or email at least 15 days prior to the member meeting at which the vote will take place.~~

7.1.2 The board of directors shall provide written notice to the members containing a statement that the members will be asked to approve the amendment and a copy of the proposed amended bylaws.

7.1.3 Action by Written Ballot: The Association will deliver a written ballot to every member entitled to vote on the matter. The ballot shall set forth each proposed action and provide an opportunity to vote for or against each proposed action and specify a reasonable time by which a ballot must be received by the Association in order to be counted. Once delivered, a ballot may not be revoked.

7.1.4 Approval: Approval by written ballot shall be valid only when the number of votes cast by ballot equals or exceeds a quorum of the members, and the number of approvals equals or exceeds two-thirds majority of the number of the returned ballots.

7.1.5 Quorum: A quorum of the members shall consist of a majority of members in good standing at the time the ballots are to be returned to the Association.

7.1.27.1.6 Whenever an amendment or new bylaw is adopted, it shall be copied in the minute book with the original bylaws in the appropriate place. If any bylaw is repealed, the fact of repeal and the date on which the repeal occurred shall be stated in such book and place.

7.2 Inspection of Books and Records. All books, records, and accounts of the Association shall be open to inspection by the directors in the manner and to the extent required by law.

7.3 Checks, Drafts, Etc. All checks, drafts, and other orders for payment of money, notes, or other evidences of indebtedness issued in the name of or payable to the Association shall be signed or endorsed by such person or persons and in such manner as shall be determined by resolution of the board of directors.

7.4 Deposits. All funds of the Association not otherwise employed shall be deposited to the credit of the Association in those banks, trust companies or other depositories as the board of directors or officers of the Association designated by the board of directors select, or be invested as authorized by the board of directors.

7.5 Loans or Guarantees. The Association shall not borrow money and no evidence of indebtedness shall be issued in its name unless authorized by the board of directors. This authority may be general or confined to specific instances. Except as explicitly permitted by ORS 65.364, the Association shall not make a loan, guarantee an obligation or modify a pre-existing loan or guarantee to or for the benefit of a director or officer of the Association.

7.6 Execution of Documents. The board of directors may, except as otherwise provided in these bylaws, authorize any officer or agent to enter into any contract or execute any instrument in the name of and on behalf of the Association. Such authority may be general or confined to specific instances. Unless so authorized by the board of directors, no officer, agent, or employee shall have any power or authority to bind the Association by any contract or engagement, or to pledge its credit, or to render it liable for any purpose or for any amount.

7.7 Insurance. The Association may purchase and maintain insurance on behalf of an individual against liability asserted against or incurred by the individual who is or was a director, officer, employee, or agent of the Association, or who, while a director, officer, employee, or agent of the Association, is or was serving at the request of the Association as a director, officer, partner, trustee, employee, or agent of another foreign or domestic business or nonprofit corporation, partnership, joint venture, trust, employee benefit plan, or other enterprise; provided, however, that the Association may not purchase or maintain such insurance to indemnify any director, officer, or agent of the Association in connection with any proceeding charging improper personal benefit to the director, officer, or agent in which the director, officer, or agent was adjudged liable on the basis that personal benefit was improperly received by the director, officer, or agent.

7.8 Fiscal Year. The fiscal year of the Association shall begin on the first day of July 1 and end on the last day of June in each year.

7.9 Severability. A determination that any provision of these bylaws is for any reason inapplicable, invalid, illegal or otherwise ineffective shall not affect or invalidate any other provision of these bylaws.

* * * * *

The foregoing bylaws were approved by the membership of the Oregon School Boards Association on December 14, 2018. The original bylaws were duly adopted by the Board of Directors of OSBA on September 15, 2017, and approved by the membership on December 15, 2017.

DRAFT

BUDGET COMMITTEE POSITION NUMBER CORRECTION

CONSENT E
December 7, 2023

SUPERINTENDENT’S RECOMMENDATION:

Correct the Budget Committee vacancy action on September 21, 2023 and the Budget Committee appointment action on November 9, 2023 to correctly identify Ankur Doshi as being appointed to Position 13 of the North Clackamas School District Budget Committee.

ORIGINATION OF AGENDA ITEM:

Correct previous board action.

BACKGROUND:

On September 21, 2023, the Board declared Position 14 on the Budget Committee vacant. Due to a typographical error, this should have been Position 13. The term of the vacant position was correct.

On November 9, 2023 the Board appointed Ankur Doshi to Position 14 on the Budget Committee. This should have been Position 13. The term of the appointed position was correct.

On November 14, 2023 staff discovered the position number error, alerted the Superintendent and prepared this consent agenda item for correction.

STAFF CONTACT:

Tiffany Shireman, Chief of Staff

SCHOOL PRESENTATION:
LINWOOD ELEMENTARY

PRESENTATION
Agenda Item #2
December 7, 2023

SUPERINTENDENT'S RECOMMENDATION:

This item is presented for Board Information.

BACKGROUND:

This year, a school will be highlighted each month, and a presentation will be made to the School Board to engage in a discussion on student achievement.

Linwood Elementary is committed to its mission and goals, emphasizing our continuous pursuit of school improvement and excellence. Linwood takes immense pride in the aspects that make us truly unique and will showcase "A Day in the Life of Linwood Students," how we structure professional learning communities (PLCs) along with Multi-Tiered System of Support (MTSS) both academically and through social/emotional learning. We are constantly learning about and responding to the strengths and needs of all students. Our staff collaboration is a cornerstone of our success, as we believe that every child is an asset to our community.

As of 11/28/2023, Linwood Elementary has 248 students.

ATTACHMENTS:

- A. [Oregon At-A-Glance School Profile 22-23](#)
- B. [Oregon At-A-Glance School Profile 21-22](#)
- C. [Linwood Elementary Board Presentation Slides](#)

PRESENTERS / STAFF CONTACT:

Patricia Ahrens, Executive Director of Elementary Programs
Nabil Zerizef, Principal, Linwood Elementary
Brian Cates, Assistant Principal, Linwood Elementary
Vickie Beraka, Title I Instructional Coach
Bobbie Reed, PTA President and Volunteer



OREGON AT-A-GLANCE SCHOOL PROFILE

Linwood Elementary School

PRINCIPAL: Nabil Zerizef | GRADES: K-5 | 11909 SE Linwood Ave, Milwaukie 97222 | 503-353-5460

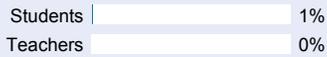
2022-23

Students We Serve

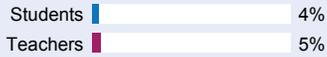


DEMOGRAPHICS

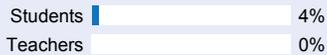
American Indian/Alaska Native



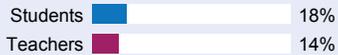
Asian



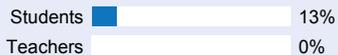
Black/African American



Hispanic/Latino



Multiracial



Native Hawaiian/Pacific Islander



White



20%

Ever English Learners



13

Languages Spoken

25%

Students with Disabilities

89%

Required Childhood Vaccinations

>95%

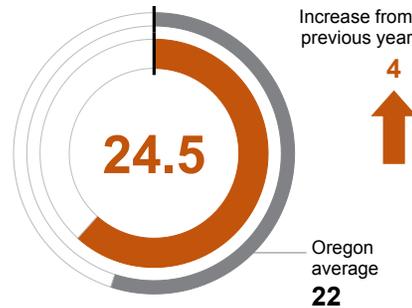
Free/Reduced Price Lunch

*<10 students or data unavailable

School Environment

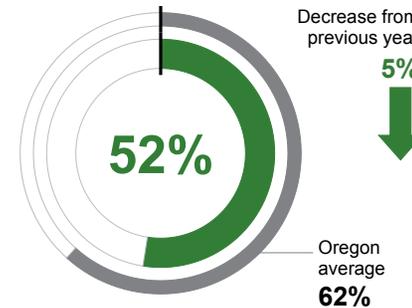
CLASS SIZE

Median class size.



REGULAR ATTENDERS

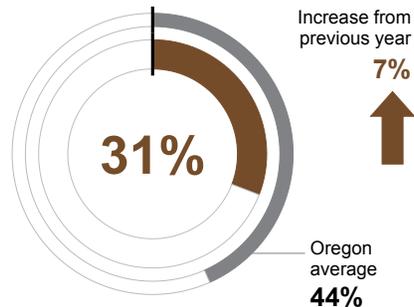
Students who attended more than 90% of their enrolled school days.



Academic Success

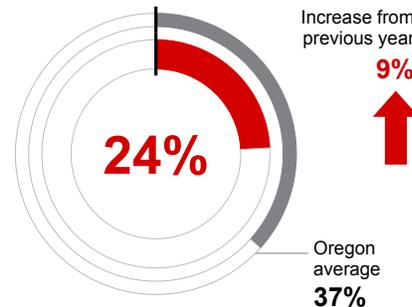
ENGLISH LANGUAGE ARTS

Students meeting state grade-level expectations.



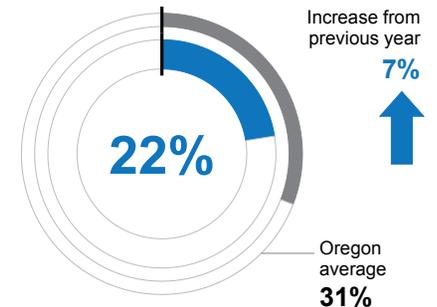
MATHEMATICS

Students meeting state grade-level expectations.



SCIENCE

Students meeting state grade-level expectations.



School Goals

As NSCD elementary school students enter one of our vibrant neighborhood, magnet, or charter schools, NCSD fosters a joy of learning, nurtures a positive vision for their future, and cultivates a school environment where all cultural heritages are valued. NCSD's elementary schools are striving to achieve this vision by focusing on the whole child and ensuring social, emotional, physical, and academic needs are met.

State Goals

The Oregon Department of Education is partnering with school districts and local communities to ensure a 90% on-time, four year graduation rate by 2027. To progress toward this goal, the state will prioritize efforts to improve attendance, provide a well-rounded education, invest in implementing culturally responsive practices, and promote continuous improvement to close opportunity and achievement gaps for historically and currently underserved students.

Safe & Welcoming Environment

NCSD believes the physical, social, and emotional safety of all students is a priority no matter their demographics or identities. Therefore, NCSD has an obligation to each student, family, staff member, and community member to provide environments that hold a fundamental sense of safety and respect. NCSD values all people regardless of background, race, color, religion, sex, sexual orientation, gender identity, national or ethnic origin, marital status, age, disability, or familial status.



Outcomes

Our Staff (rounded FTE)



16

Teachers



7

Educational assistants



1

Counselors/
Psychologists/
Social Workers



91%

Average teacher retention rate over the past three years



89%

% of licensed teachers with more than 3 years of experience



No

Same principal in the last 3 years

REGULAR ATTENDERS

American Indian/Alaska Native	<10 students or data unavailable
Asian	<10 students or data unavailable
Black/African American	60%
Hispanic/Latino	49%
Multiracial	47%
Native Hawaiian/Pacific Islander	53%
White	53%
Free/Reduced Price Lunch	52%
Ever English Learner	48%
Students with Disabilities	58%
Migrant	<10 students or data unavailable
Homeless	<10 students or data unavailable
Students in Foster Care	<10 students or data unavailable
Military Connected	<10 students or data unavailable
Talented and Gifted	<10 students or data unavailable
Female	48%
Male	56%
Non-Binary	<10 students or data unavailable

ENGLISH LANGUAGE ARTS

<10 students or data unavailable
<10 students or data unavailable
<10 students or data unavailable
22%
10%
<10 students or data unavailable
46%
31%
13%
20%
<10 students or data unavailable
28%
33%
<10 students or data unavailable

MATHEMATICS

<10 students or data unavailable
<10 students or data unavailable
<10 students or data unavailable
5%
20%
<10 students or data unavailable
39%
24%
<5%
12%
<10 students or data unavailable
10%
36%
<10 students or data unavailable

About Our School

BULLYING, HARASSMENT, AND SAFETY POLICIES

NCSD believes that in order for all students, families, and staff members to feel important and welcome as members of the school community, they must feel safe - physically, emotionally, and psychologically. For this reason, NCSD has a comprehensive set of policies that prohibit bullying and harassment, and NCSD has established multiple reporting and accountability measures designed to assist NCSD to respond quickly to these incidents. Information about NCSD's policies can be found at bit.ly/2CrTbnk.

EXTRACURRICULAR ACTIVITIES

North Clackamas School District offers a range of extracurricular activities for our elementary-aged students. Some examples may include: morning/after school CARE program, PTA/PTO-sponsored events, music and arts education, and partnerships with local, community-based organizations.

PARENT ENGAGEMENT

Engaged families are a key component in the academic success of students. NCSD provides multiple forums for families to become invested in their child's education, their schools, and the larger NCSD community. Whether their students are striving or thriving, NCSD believes it is essential for families to actively participate in their children's education, and NCSD's schools know this is a key responsibility.

COMMUNITY ENGAGEMENT

North Clackamas Schools welcomes and values the contributions of its community partners. Local businesses, social service organizations, and numerous individual volunteers add to the richness of the NCSD experience, both inside and outside of classrooms. Volunteers are welcome at our schools, and are a valued source of knowledge and expertise benefiting students and staff.



OREGON AT-A-GLANCE SCHOOL PROFILE

Linwood Elementary School

PRINCIPAL: Nabil Zerizef | GRADES: K-5 | 11909 SE Linwood Ave, Milwaukie 97222 | 503-353-5460

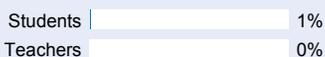


Students We Serve

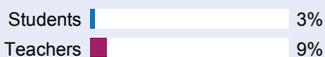


DEMOGRAPHICS

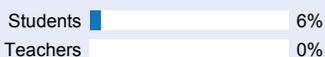
American Indian/Alaska Native



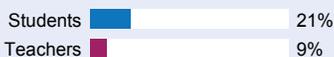
Asian



Black/African American



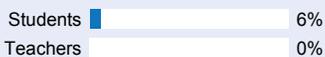
Hispanic/Latino



Multiracial



Native Hawaiian/Pacific Islander



White



20%

Ever English Learners



11

Languages Spoken

21%

Students with Disabilities

93%

Required Childhood Vaccinations

>95%

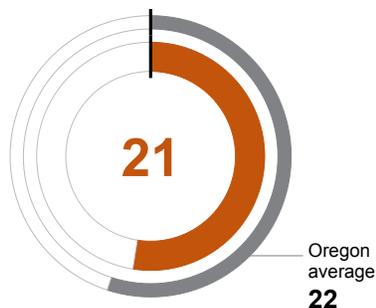
Free/Reduced Price Lunch

*<10 students or data unavailable

School Environment

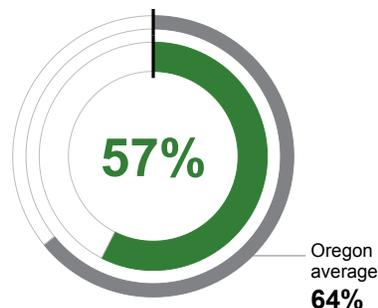
CLASS SIZE

Median class size.



REGULAR ATTENDERS

Students who attended more than 90% of their enrolled school days.



Academic Progress

INDIVIDUAL STUDENT PROGRESS

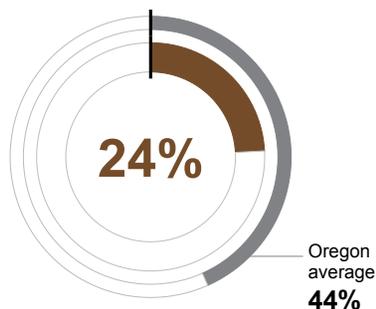
Year-to-year progress in English language arts and mathematics.

Data not available in 2021-22

Academic Success

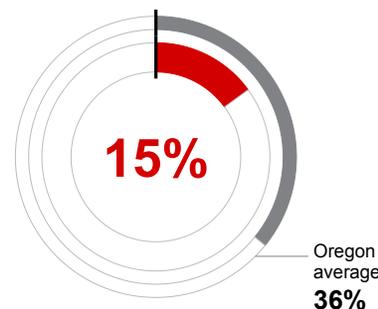
ENGLISH LANGUAGE ARTS

Students meeting state grade-level expectations.



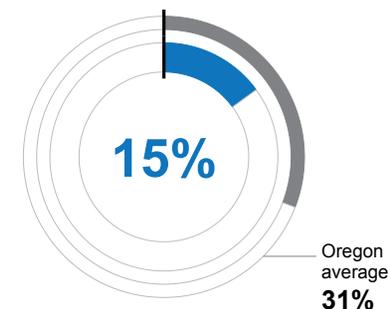
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Average teacher retention rate



90%

% of licensed teachers with more than 3 years of experience



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Hispanic/Latino	58%
Multiracial	52%
Native Hawaiian/Pacific Islander	36%
White	62%
Free/Reduced Price Lunch	57%
Ever English Learner	50%
Students with Disabilities	55%
Migrant	<10 students or data unavailable
Homeless	<10 students or data unavailable
Students in Foster Care	<10 students or data unavailable
Talented and Gifted	<10 students or data unavailable
Female	54%
Male	61%
Non-Binary	<10 students or data unavailable

ENGLISH LANGUAGE ARTS

<10 students or data unavailable
<10 students or data unavailable
<10 students or data unavailable
23%
18%
<10 students or data unavailable
30%
24%
10%
<5%
<10 students or data unavailable
34%
16%
<10 students or data unavailable

MATHEMATICS

<10 students or data unavailable
<10 students or data unavailable
<10 students or data unavailable
14%
9%
<10 students or data unavailable
15%
15%
24%
<5%
<10 students or data unavailable
8%
21%
<10 students or data unavailable

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Engaged families are a key component in the academic success of students. NCSD provides multiple forums for families to become invested in their child's education, their schools, and the larger NCSD community. Whether their students are striving or thriving, NCSD believes it is essential for families to actively participate in their children's education, and NCSD's schools know this is a key responsibility.

COMMUNITY ENGAGEMENT

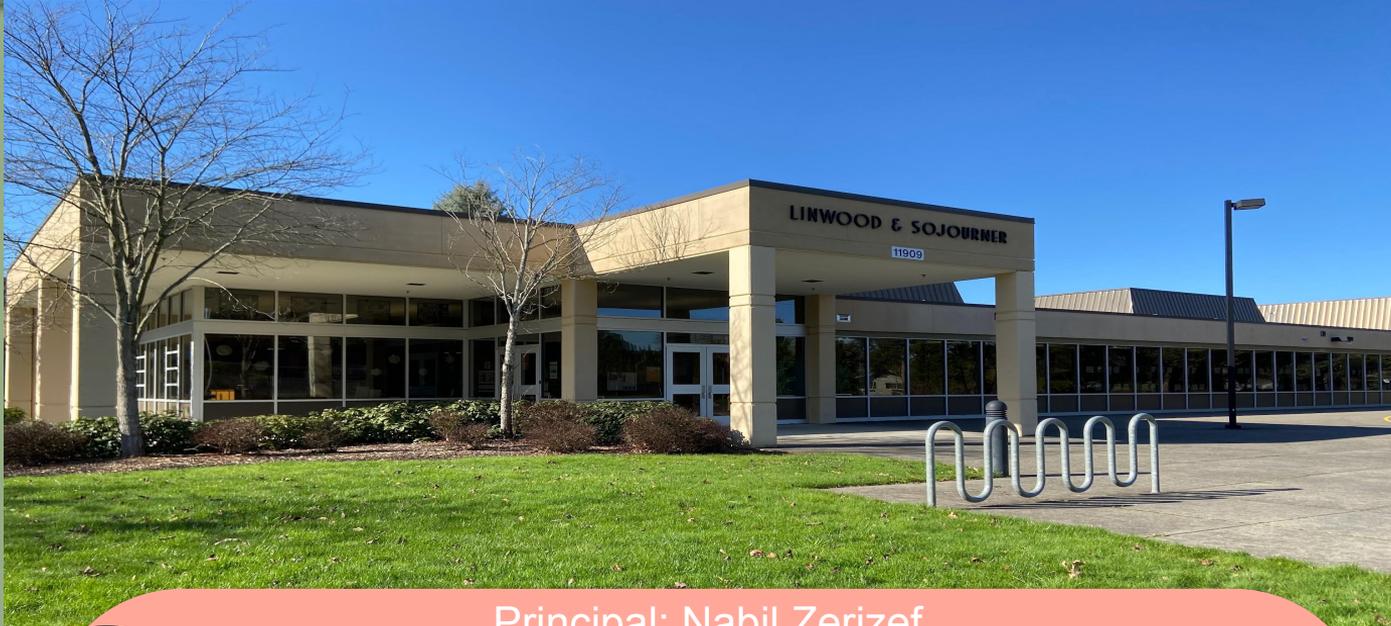
North Clackamas Schools welcomes and values the contributions of its community partners. Local businesses, social service organizations, and numerous individual volunteers add to the richness of the NCSD experience, both inside and outside of classrooms. Volunteers are welcome at our schools, and are a valued source of knowledge and expertise benefiting students and staff.

A red rounded rectangle containing the date "12/7/23" in white text. The background of the slide is a stylized illustration of a greenhouse with various potted plants, including a cactus in a yellow pot, a succulent in a blue macramé hanger, a purple plant in a blue pot, and a green plant in a pink pot.

Linwood Elementary School

Inspiring graduates who are empowered to act with
courage in life and to strengthen local and global
communities.

Linwood Elementary: Who We Are



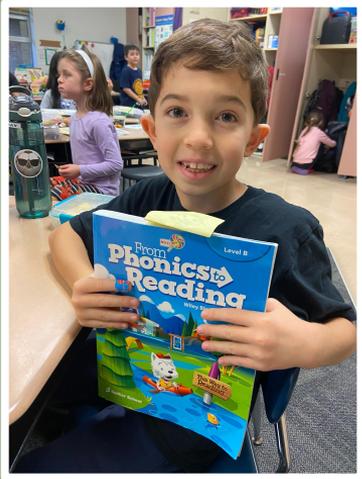
Principal: Nabil Zerizef
Assistant Principal: Brian Cates
Instructional Coach: Vickie Beraka
PTA President & Community Volunteer: Bobbie Reed

Current Demographics

Race	Number	Percent
American Indian/ Alaskan Native	4	2%
Asian	8	3%
Black/ African American	14	6%
Hispanic	53	21%
Native Hawaiian/Other Pacific Islander	17	7%
Two More	27	11%
White	123	50%

Additional home languages - Amharic, Arabic, Cambodian, Cantonese, Chinese, Chuukese, Filipino, German, Korean, Hmong, Portuguese, Russian, Spanish, Ukrainian, Vietnamese

Universal Instruction: Core (Tier I)



2nd Grade phonics curriculum!

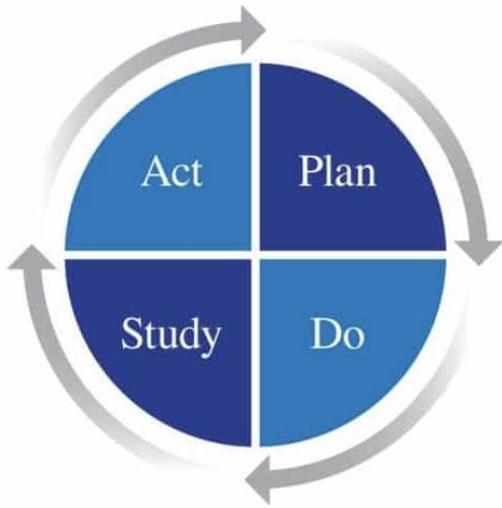


3rd Grade Writing Celebration with family members!

Focus Areas: Writing & Phonics

- Professional Development- Multiple Opportunities throughout the year.
- PLCs- Following a cohesive district process.
- Lesson Study- Peer observation and learning opportunities: writing, phonics and small group instruction

Professional Learning Communities (PLC)



- All schools following the same format for collaboration
- Teams discuss standards, teaching practices and lessons
- Teams review data to see if students are learning - problem solve if adjustments are needed
- Dedicated learning time to improve instructional outcomes

Finding ways to bring our collective knowledge around PLC's and link it to new learning

MTSS: Tier 2

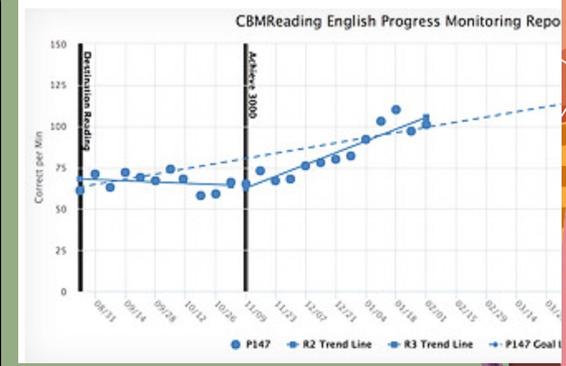
Providing more intensity and smaller groupings to accelerate learning.



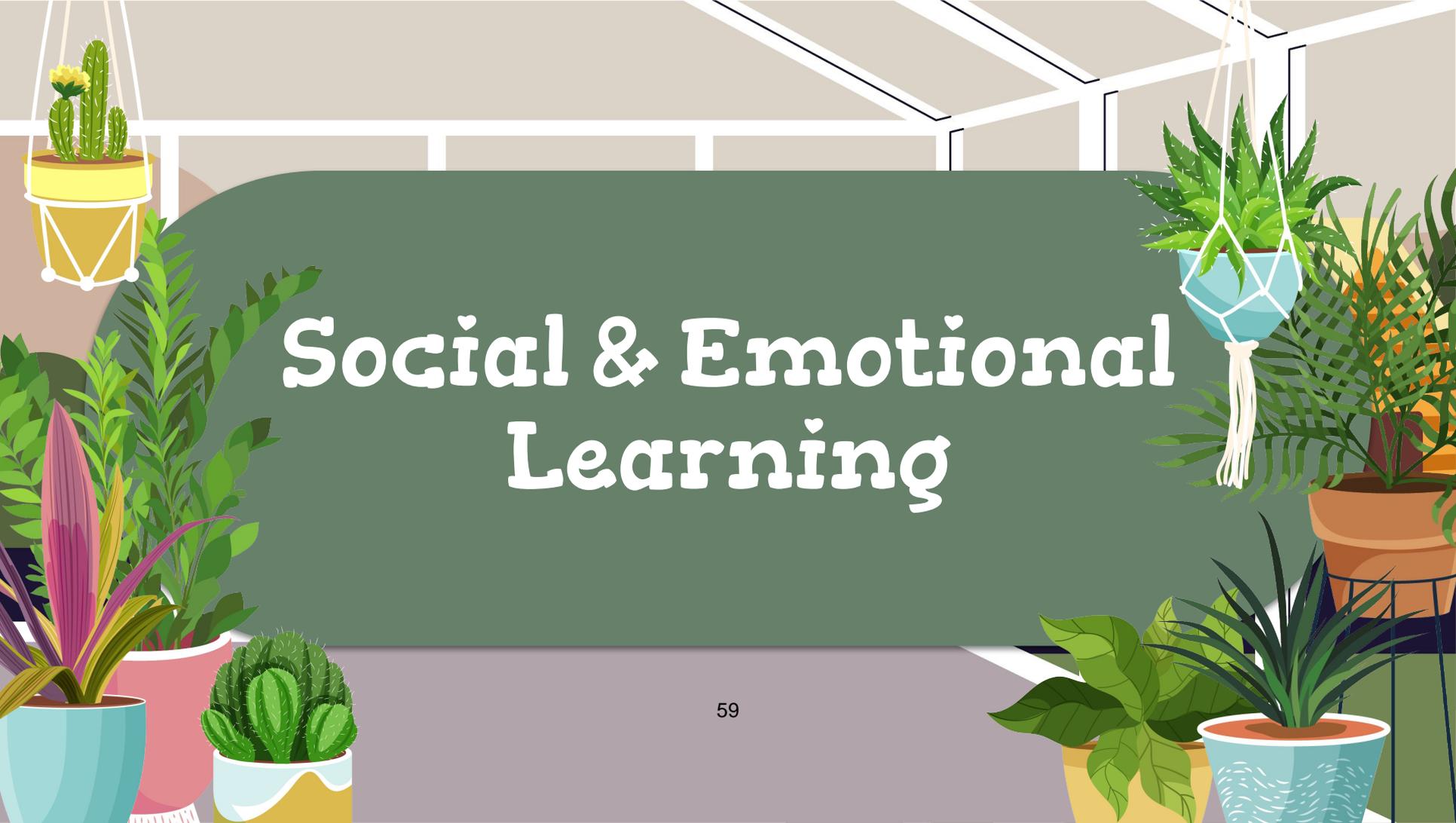
K/1/2
Reteaching core



3/4/5
Benchmark Phonics



K-5
Using Data to Monitor our Progress



Social & Emotional Learning

Learning for Social and Emotional Wellbeing

- **Caring School Community Curriculum**
 - Morning and Closing Circles
 - Cross-Aged Buddies
 - Regulation Spaces
 - Classroom Break Spaces
 - S’Cool Moves Stations
 - Sensory Path
 - Explicit teaching of regulation strategies
- **Counselor Lessons**
 - Kelso and Superflex problem solving
 - Second Steps

Social and Emotional Accommodations



- Student Support Team Weekly Meetings
 - Use of data to inform decisions
 - Collaboration with community resources
- Interventions
 - Identify strengths and needs
 - Develop plan of action
- OASIS (Regulation Room)
 - Intentional skill teaching

In Students' Own Words

- “I like how my teacher helps me because when I feel frustrated or upset my teacher is there to help me and my teacher helps me by motivating me.”
- “When I'm in class I like how we greet each other in different ways every week. I also like how In math class we work on useful things.”
- “What I like about my school and class is that they are always positive to others and don't judge me for who I am.”
- “My teacher wants me to try hard in math to explain my thinking. She tells me to push harder beyond the boundaries.”

*Anonymous Student responses from 2022/2023 YouthTruth Survey

Family and Staff Survey Highlights

- 79% of families agree or strongly agree with the following statement: *“I receive information about what my child should learn and be able to do.”* This is an 8 percent increase from 2022 and 9 percent higher than the typical North Clackamas School.
- Staff Strength: 89% of staff reported, **“My school is cooperative and team-oriented.”** This is compared to 80% of staff at a typical North Clackamas School.

*Data from 2022/2023 YouthTruth Survey

Volunteers



- Linwood PTA / Volunteers (86 hours)
 - Jog-a-thon
 - Classroom Volunteers / Field Trips
 - Picture day
 - Dental / Vision screening
 - Teacher appreciation
 - Dance Night
 - Title I Night
- Bobbie Reed: In a category of her own
 - Started Volunteering in 2007
 - Volunteers 8 hours daily
 - **Nearly 500 hours this year alone!**

Question & Answer:



YEAR END FINANCIAL REPORT

REPORT
Agenda Item # 4
December 7, 2023

SUPERINTENDENT’S RECOMMENDATION:

Information presented for review and discussion.

BACKGROUND:

Financial Highlights:

The 2022-23 General Fund ending balance is projected to be approximately \$66.3 million, or 22.77% of revenues and \$21.5 million more than the prior year. The district is ending the fiscal year in a stable financial position with healthy reserves.

The beginning fund balance on the attached Quarterly Financial Report has been adjusted to reflect the fund balance changes between the **Budget**, which was the best estimate during the budget development process in the spring, and the **Activity** columns. The projected ending fund balance for 2022-23 continues to be above the minimum required by Board Policy.

Notes:

Forecast for total revenue has been increased by \$11.1M, with increases in the following categories; the State School Fund has been increased by \$3.5M from the last projection to account for final year-end adjustments, Property Taxes were higher than forecasted by \$690K, Local Option Levy revenue has been increased by \$710K, and revenue from Clackamas ESD was increased by \$640K. Earnings from Investments have been increased by \$2.0M, and Other Dues and Fees reflects an increase of \$3.6M primarily from the recovery of Prior Year Expenses. Revenue from High-Cost Disability Grant has been decreased by \$600K as a result of fewer placements than initially anticipated.

The forecast for total expenditures has been decreased by \$16M in total. Salaries and Benefits ended under budget by \$6M and \$10M, respectively. Non-Personnel cost have largely held to budget, and transfers out are \$750K under budget.

Investment Report:

Investment of Funds is outlined in NCSD Policy DFA, requiring quarterly investment information reporting to the Board. The Local Government Investment Pool (LGIP) is one of the primary institutions used for district investments, producing the highest interest rate for short-term investments at this time. The current interest rate is .55% as of June 30, 2023.

In accordance with NCSD Policy DFA and DFA-AR Investment of Funds, attached is the quarterly report containing information about the investment portfolio as of June 30, 2023.

The Investment Portfolio Summary report is a summary of all fixed income investments, the LGIP, bank checking accounts and bank “money market” account balances. The combined portfolio contained \$143.4M at a weighted average nominal rate of return of 0.23%. This report

recaps the percentage of the portfolio invested in each category (i.e. US Government Treasury investments, US Government Agency investments, Corporate Notes) and compares to policy percentage restrictions. As of June 30, 2023 all categories were in compliance with Board Policy. This report also provides the weighted average yield by issuer.

ATTACHMENTS:

Quarterly Financial Report
Investment Portfolio Summary

PRESENTER / STAFF CONTACT:

Matt Makara, Executive Director of Finance and Business Services

North Clackamas School District No. 12
Quarterly Financial Report
General Fund
For the Period Ended June 30, 2023

	Budget	2022 - 2023 Activity			
	Adopted Budget 2022-23	YTD Actuals Through 6-30-2023	Encumbrances Through 6-30-2023	Actuals Including Encumbrances	Forecast Through 6-30-2023
REVENUES:					
Beginning Fund Balance (BFB)	\$ 40,574,139	\$ 44,760,388	\$ -	\$ 44,760,388	\$ 44,760,388
Restricted Fund Balance		2,584,919	-	2,584,919	2,584,919
State School Fund:				-	-
State Funds	119,425,929	122,964,289	-	122,964,289	122,964,289
Property Taxes	77,400,000	78,091,362	-	78,091,362	78,091,362
Local Option Levy	20,517,806	22,878,573	-	22,878,573	22,878,573
Federal Forest Fees	-	149,634	-	149,634	149,634
Common School Fund	1,831,694	2,180,331	-	2,180,331	2,180,331
County School Fund	-	-	-	-	-
High Cost Disability Grant	2,000,000	1,398,983	-	1,398,983	1,398,983
Investment Earnings	325,000	3,098,720	-	3,098,720	3,098,720
Intermediate Sources-CESD	2,810,204	3,449,500	-	3,449,500	3,449,500
Other Services and Fees	4,388,723	9,478,547	-	9,478,547	9,478,547
Transfers-in	-	-	-	-	-
Subtotal Revenues (excluding BFB)	\$ 228,699,356	\$ 243,689,939	\$ -	\$ 243,689,939	\$ 243,689,939
Total Revenues (including BFB)	\$ 269,273,495	\$ 291,035,246	\$ -	\$ 291,035,246	\$ 291,035,246
EXPENDITURES:					
Salaries	\$ 126,049,903	\$ 119,790,110		\$ 119,790,110	\$ 119,790,110
Benefits	73,442,431	62,990,230		62,990,230	62,990,230
Purchased Services	27,257,453	28,048,832		28,048,832	28,048,832
Supplies & Materials	7,980,251	6,964,576		6,964,576	6,964,576
Capital Outlay	355,000	94,340		94,340	94,340
Dues and Fees	1,750,595	1,957,820		1,957,820	1,957,820
Transfers-out	5,674,380	4,924,380		4,924,380	4,924,380
Subtotal Expenditures	\$ 242,510,013	\$ 224,770,288	\$ -	\$ 224,770,288	\$ 224,770,288
CONTINGENCY:	\$ 26,763,482	\$ -	\$ -	\$ -	\$ -
Total Expenditures	\$ 269,273,495	\$ 224,770,288	\$ -	\$ 224,770,288	\$ 224,770,288
*Projected Ending Fund Balance on 6-30-23					\$ 66,264,958
Projected Ending Fund Balance as a Percentage of Forecasted Revenue at 6-30-2023					22.77%



Investment Portfolio Summary

6/30/2023

Issuer	Book Value	Percentage of Portfolio	Maximum allowed per Policy	Over	Weighted Ave Yield
US Gov't Treasuries					
US Gov't Treasury	\$ -	0.00%	100%		0.00%
Sub Total	\$ -	0.00%	100%		
Municipalities					
	\$ -	0.00%	25%	N/A	
Sub Total	\$ -	0.00%	25%		
US Gov't Agencies					
Federal Home Loan Mortgage	\$ -	0.00%	25%	N/A	0.00%
Sub Total	\$ -	0.00%	100%	N/A	0.00%
Corporate Notes					
	\$ -	0.00%	5%	N/A	0.00%
Sub Total	\$ -	0.00%	35%	N/A	0.00%
Total Investment Portfolio					
	\$ -	0.00%			0.00%
Banks/Money Market					
US Bank - Bond Checking	\$ 6,564,196.47	4.58%			
Umpqua Bank MMKT - Fund 420	\$ 52,187.69	0.04%			0.25%
Washington Federal MMKT - Fund 100	\$ 20,948,123.38	14.61%			0.15%
US Bank - General Checking	\$ 62,477,777.33	43.56%			
Sub Total - banks	\$ 90,042,284.87				
			LGIP Limit	Under/Over	
LGIP 3581 Bond Fund 420	\$ 6,150,000.17				0.55%
LGIP 4904 General Fund 100	\$ 47,227,002.24				0.55%
Total Cash and Equivalents	\$ 53,377,002.41	37.22%	52,713,000	(664,002)	
Grand Total					
	\$ 143,419,287.28				0.23%

QUARTERLY FINANCIAL REPORT

REPORT
Agenda Item #5
December 7, 2023

SUPERINTENDENT’S RECOMMENDATION:

Information presented for review and discussion

BACKGROUND:

Financial Highlights:

The 2023-24 General Fund ending balance is projected to be approximately \$53.8 million, or 17.47% of revenues and \$12.5 million less than the prior year. The district is currently in a stable financial position as we enter the new fiscal year as a result of increased state funding, healthy reserves, and the tremendous support of our community, as demonstrated by the renewal of our Local Option Levy.

The 2022-23 ending fund balance becomes the 2023-24 beginning fund balance. The beginning fund balance on the attached Quarterly Financial Report has been adjusted to reflect the fund balance changes between the Budget, which was the best estimate during the budget development process in the spring, and the Activity columns. The projected ending fund balance for 2023-24 continues to be above the minimum required by Board Policy.

Notes:

Some potential activities not reflected in this report that may impact the Budget in the Fiscal Year are:

- 1) Potential for increased Investment Income and/or debt reduction
- 2) Changes in how expenses for Licensed Substitutes will be recognized. Anticipated changes will result in Substitute costs being reflected as a Purchased Service rather than as Personnel Costs
- 3) Possible staffing retention strategies
- 4) Possible support for deferred maintenance on facilities and facility acquisition
- 5) Changes in student enrollment

Investment Report:

Investment of Funds is outlined in NCSD Policy DFA, requiring quarterly investment information reporting to the Board. The Local Government Investment Pool (LGIP) is one of the primary institutions used for district investments, producing the highest interest rate for short-term investments at this time. The current interest rate is .55% as of September 30, 2023, which is unchanged from the last quarterly presentation.

The Investment Portfolio Summary report is a summary of all fixed income investments, the LGIP, bank checking accounts and bank “money market” account balances. The combined portfolio contained \$125.1 million at a weighted average nominal rate of return of .27%. This report recaps the percentage of the portfolio invested in each category (i.e. US Government Treasury investments, US Government Agency investments, Corporate Notes) and compares to

policy percentage restrictions. As of September 30, 2023 all categories were in compliance with Board Policy. This report also provides the weighted average yield by issuer.

ATTACHMENTS:

Quarterly Financial Report
Investment Portfolio Summary

PRESENTER / STAFF CONTACT:

Matt Makara, Executive Director of Finance and Business Services

North Clackamas School District No. 12
Quarterly Financial Report
General Fund
For the Period Ended September 30, 2023

	Budget	2023 - 2024 Activity			
	Adopted Budget 2023-24	YTD Actuals Through 09-30-2023	Encumbrances Through 09-30-2023	Actuals Including Encumbrances	Forecast Through 6-30-2024
REVENUES:					
Beginning Fund Balance (BFB)	\$ 36,684,649	\$ 66,264,958	\$ -	\$ 66,264,958	\$ 66,264,958
State School Fund:					
State Funds	123,826,396	42,562,696	-	42,562,696	123,826,396
Property Taxes	82,762,436	476,005	-	476,005	82,762,436
Local Option Levy	23,171,329	78,797	-	78,797	23,171,329
Federal Forest Fees			-	-	-
Common School Fund	1,931,694		-	-	1,931,694
County School Fund			-	-	-
High Cost Disability Grant	2,000,000	-	-	-	2,000,000
Investment Earnings	375,000	320,425	-	320,425	375,000
Intermediate Sources-CESD	2,808,000	42,787	-	42,787	2,808,000
Other Services and Fees	4,586,596	265,484	-	265,484	4,586,596
Transfers-in	-	-	-	-	-
Subtotal Revenues excluding BFB	\$ 241,461,451	\$ 43,746,193	\$ -	\$ 43,746,193	\$ 241,461,451
Total Revenues including BFB	\$ 278,146,100	\$ 110,011,151	\$ -	\$ 110,011,151	\$ 307,726,409
EXPENDITURES:					
Salaries	\$ 131,271,292	\$ 15,897,752	\$ 105,775,278	\$ 121,673,030	\$ 131,271,292
Benefits	77,019,588	8,713,917	58,680,773	67,394,689	77,019,588
Purchased Services	28,333,040	5,539,641	9,709,461	15,249,102	28,333,040
Supplies & Materials	9,298,875	2,352,139	2,237,274	4,589,413	9,298,875
Capital Outlay	355,000	52,603	-	52,603	355,000
Dues and Fees	2,008,745	1,438,830	21,331	1,460,161	2,008,745
Transfers-out	5,674,380	-	-	-	5,674,380
Subtotal Expenditures	\$ 253,960,920	\$ 33,994,882	\$ 176,424,117	\$ 210,418,998	\$ 253,960,920
CONTINGENCY:	\$ 24,185,180	\$ -	\$ -	\$ -	\$ -
Total Expenditures	\$ 278,146,100	\$ 33,994,882	\$ 176,424,117	\$ 210,418,998	\$ 253,960,920
*Projected Ending Fund Balance on 6-30-24					\$ 53,765,489
Projected Ending Fund Balance as a Percentage of Forecasted Revenue at 6-30-2024					17.47%



Investment Portfolio Summary

9/30/2023

US Gov't Treasuries

Issuer	Book Value	Percentage of Portfolio	Maximum allowed per Policy	Over	Weighted Ave Yield
US Gov't Treasury	\$ -	0.00%	100%		0.00%
Sub Total	\$ -	0.00%	100%		

Municipalities

	\$ -	0.00%	25%	N/A	
Sub Total	\$ -	0.00%	25%		

US Gov't Agencies

Federal Home Loan Mortgage	\$ -	0.00%	25%	N/A	0.00%
Sub Total	\$ -	0.00%	100%	N/A	0.00%

Corporate Notes

	\$ -	0.00%	5%	N/A	0.00%
Sub Total	\$ -	0.00%	35%	N/A	0.00%

Total Investment Portfolio

	\$ -	0.00%			0.00%
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Banks/Money Market

US Bank - Bond Checking	\$ 4,166,993.76	3.33%			
Washington Federal MMKT - Fund 100	\$ 21,171,369.44	16.92%			0.15%
US Bank - General Checking	\$ 44,234,988.21	35.35%			
Sub Total - banks	\$ 69,573,351.41				

			<u>LGIP Limit</u>	<u>Under/Over</u>	
LGIP 3581 Bond Fund 420	\$ 6,244,057.10				0.55%
LGIP 4904 General Fund 100	\$ 49,320,106.45				0.55%
Total Cash and Equivalents	\$ 55,564,163.55	44.40%	\$ 59,847,000	4,282,836	

Grand Total

	\$ 125,137,514.96				0.27%
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POLICY REVISIONS

DISCUSSION
Agenda Item #6
December 7, 2023

REASON FOR BOARD CONSIDERATION:

First reading of the attached revised policies.

RECOMMENDATION:

The Superintendent’s Policy Review Team, with representation of both staff and Board, reviewed and supports the following policy revisions.

BUDGET IMPACT/SOURCE OF FUNDS:

There are no known or anticipated increases to costs with the proposed policy change.

ATTACHMENTS:

Drafts of the following policies to review:

Policy	Title	Reason
BDC	Executive Session	OSBA August 2023 Update, House Bill 2805 and House Bill 2806 added new provisions to Public Meeting Laws and executive sessions, including allowing executive sessions for matters relating to the safety of the governing body and cyber security.
ECACB	Unmanned Aircraft System (UAS) a.k.a. Drone	The use of drones by NCS D district staff and third parties (for reasons including but not limited to instruction, extracurricular activity, footage for external communications, and facility status review) has increased since the pandemic. Adoption of a policy standardizing practices is recommended by OSBA, PACE (NCS D’s property and liability insurance) and the NCS D Risk Management Department.
IGDJ	Interscholastic Activities	OSBA August 2022 Update, to better align policy language with statute, including Division 22 requirements, and revise language to reflect current terms and practices.
KGB	Public Conduct on District Property	Relettering of Policy KGB to KD.

PRESENTER / STAFF CONTACT:

Tiffany Shireman, Chief of Staff



Code: BDC
Adopted: 6/19/86
Revised/Readopted: 1/20/11; 9/22/16; 2/27/20
Orig. Code: BDC

Executive Sessions

Executive sessions may be held during a regular, special or emergency meeting for any reason permitted by law. Final action on an item discussed in executive session will be accomplished in open session. The Board may meet in executive session to discuss subjects allowed by statute but may not take final action, except for the expulsion of a student and matters pertaining to or examination of the confidential records of a student.

An executive session may be included as an agenda item of an existing meeting or held as its own meeting. Proper notice is required.

If an open session is held prior to the executive session, the presiding officer will announce the executive session by identifying the authorization under Oregon Revised Statute (ORS) 192.660 or ORS 332.061 for holding such session, and by noting the subject of the executive session.

The Board may hold an executive session:

1. To consider the employment of a public officer, employee, staff member or individual agent.¹ (ORS 192.660(2)(a))
2. To consider the dismissal or disciplining of, or to hear complaints or charges brought against, a public officer², employee, staff member or individual agent who does not request an open hearing. (ORS 192.660(2)(b))
3. To conduct deliberations with persons designated by the governing body to carry on labor negotiations. (ORS 192.660(2)(d))
4. To conduct deliberations with persons designated by the governing body to negotiate real property transactions. (ORS 192.660(2)(e))

¹ This provision does not apply to the filling of a vacancy in elective office or on any public committee, commission or other advisory group; or for the consideration of general employment policies. Prior to holding an executive session under ORS 192.660(2)(a), the Board must ensure

- a. The vacancy has been advertised;
- b. Regular hiring procedures have been adopted;
- c. If hiring an officer, the public has had the opportunity to comment on the employment of the officer; and
- d. If hiring a chief executive officer, the Board has adopted hiring standards, criteria and policy directives in meetings open to the public in which the public has had the opportunity to comment on the standards, criteria and policy directives.

² To determine whether the individual involved is considered a public officer, consult with legal counsel.

5. To consider information or records that are exempt by law from public inspection. (ORS 192.660(2)(f))
6. To consult with counsel concerning the legal rights and duties of a public body with regard to current litigation or litigation likely to be filed. (ORS 192.660(2)(h))
7. To review and evaluate the employment-related performance of the chief executive officer of any public body, a public officer, employee or staff member who does not request an open hearing. (ORS 192.660(2)(i))
8. To consider matters relating to school safety or a plan that responds to safety threats made toward a school. (ORS 192.660(2)(k))
9. To consider matters relating to the safety of the governing body and of public body staff and volunteers and the security of public body facilities and meeting spaces. (ORS 192.660(2)(o))
10. To consider matters relating to cyber security infrastructure and responses to cyber security threats. (ORS 192.660(2)(p))
11. To review the expulsion of a minor student from a public elementary or secondary school. (ORS 332.061(1)(a))
12. To review/discuss matters pertaining to or examination of the confidential records of a student. (ORS 332.061(1)(b))

Members of the press may attend executive sessions except for those matters pertaining to:

1. Deliberations with persons designated by the Board to carry on labor negotiations;
2. Hearings on the expulsion of a minor student or examination of the confidential records of a student; and
- ~~3. Current litigation or litigation likely to be filed if the member of the news media is a party to the litigation or is an employee, agent or contractor of a news media organization that is a party to the litigation. A representative of a news media organization that has a direct personal interest in the subject of the executive session that would frustrate the purpose of the executive session may be barred from attending. Attendance is contingent upon acceptance of rules governing disclosure of information announced by the presiding officer at the beginning of the executive session.~~

If an executive session is held pursuant to ORS 332.061, the following shall not be made public: the name of the minor student; the issue, including the student's confidential records; the discussion; and each Board member's vote on the issue.

Minutes shall be kept for all executive sessions.

Content discussed in executive sessions is confidential except as provided by law. Board members and the media are instructed not to disclose information obtained in executive session except when specifically authorized to do so or as required by law.

END OF POLICY

Legal Reference(s):

[ORS 192.660](#)

[ORS 332.045](#)

[ORS 332.061](#)

OR. ATTY. GEN. Public Records and Meetings Manual.

Oregon Government Ethics Commission, [Staff Advisory Opinion](#) No. 22-106S

[House Bill 2806](#) (2023)

Cross Reference(s):

BD/BDA - Board Meetings

BDDG - Minutes of Board Meetings

CBG - Evaluation of the Superintendent

Code: ECACB
Adopted:

Unmanned Aircraft System (UAS) a.k.a. Drone

Any employee, or representative of the district operating an unmanned aircraft system (UAS) shall do so in accordance with this policy, all applicable Federal Aviation Administration (FAA) and Oregon Department of Aviation (ODA) regulations and local laws.

A small unmanned aircraft, as defined by law, may be operated by the district. A small unmanned aircraft must weigh less than 55 pounds, including the weight of anything attached to or carried by the aircraft and must be registered through the FAA and ODA. The district will register as a user of such with ODA.

Publicly supported kindergarten through grade 12 school programs and publicly-supported entities that support K-12 schools or after school K-12 programs are exempt from the requirement to pay the ODA registration fee.

Prior to operating a UAS, the district will review all airspace, certification, registration, and other requirements. When operating in the National Airspace System (NAS), the supervisor (instructor/teacher) of the educational UAS shall hold a current pilot certification described in 14 C.F.R. Part 107 or have a Certificate of Authorization as described in 49 U.S.C. § 44801, so any student(s) can fly under their direct supervision, and to be in compliance with current FAA regulations. District employees will not operate more than one UAS at a time. District employees will not supervise more than one student, or non-licensed employee, UAS operator at a time.

District employees shall work with their supervisor and the Risk Management Department to ensure that proper insurance, registration as required by FAA and ODA, reporting to FAA, and authorization from district administration are in place prior to use as a part of the district's curriculum.

A UAS shall be operated in accordance with the policies of the Oregon School Activities Association (OSAA) at OSAA-sanctioned events.

A student in violation of this policy may be subject to disciplinary action, up to and including suspension and/or expulsion.

An employee in violation of this policy may be subject to disciplinary action, up to and including dismissal.

All data gathered by the district as part of a UAS operation will belong to the district. The data gathering by the district will follow appropriate state and federal laws. Retention of such data will follow state and federal laws.

The District shall develop procedures for the implementation of this policy. The district shall post a copy of this policy, associated procedures, and a copy of Oregon Revised Statute (ORS) 192.345 on the district's website.

The district will report accidents involving a UAS to FAA no later than 10 calendar days after the accident when it involves:

1. Serious injury to any person or any loss of consciousness; or
2. Damage to any property, other than the small UAS, unless the cost of repair (including materials and labor) does not exceed \$500, or the fair market value of the property does not exceed \$500 in the event of total loss.

Third Party Use

Third party use of a UAS on district property or at district-sponsored events or activities on district property for any purpose is prohibited, unless granted permission from the Risk Management Department.

If permission is granted by the Risk Management Department, the third party operating a UAS will comply with all FAA and ODA registration and use regulations and shall provide the following to the district:

1. Proof of insurance that meets the liability limits established by the district;
2. Proof of UAS registration and authorization (including a certificate identified in 14 C.F.R. Part 107 or a Certificate of Authorization described in 49 U.S.C. § 44801) issued by FAA, and proof of user registration with ODA when required;
3. The proposed flight plan, including date, time, flight pattern and if spotters will be utilized to monitor the area below the flight pattern; and
4. A signed agreement holding the district harmless from any claims of harm to individuals or damage to property.

END OF POLICY

Legal Reference(s):

[ORS 164.885](#)
[ORS 174.109](#)
[ORS 192.345](#)

[ORS 837.300 - 837.390](#)
[ORS 837.995](#)

[OAR 738-080-0015 - 080-0045](#)
Senate Bill 581 (2019)

Federal Aviation Administration Reauthorization Act of 2018, 49 U.S.C. §§ 44801-44810 (2012).
Small Unmanned Aircraft Systems, 14 C.F.R. Part 107 (2018).
Family Educational Rights and Privacy Act, 20 U.S.C. § 1232g (2018).
OREGON SCHOOL ACTIVITIES ASSOCIATION HANDBOOK.



Code: IGDJ
Adopted: 5/17/12
Revised/Readopted: 7/03/18; 7/11/19; 1/27/22

Interscholastic Athletics/Activities**

The Board recognizes the integral role interscholastic activities¹ play in the character development and general enhancement of the education of its students. Accordingly, administrators, coaches, advisors, student participants, and others associated with the district's high school activities programs and events² shall conduct themselves in a manner that is consistent with the letter and spirit of policies, rules, and regulations of the district and any associated voluntary organization³ of the Oregon School Activities Association (OSAA) and the fundamental values of sportsmanship. Each will be held accountable for their actions.

The district and its schools may only be members of and pay fees, if any, to a voluntary organization that administers interscholastic activities or that facilitates the scheduling and programming of interscholastic activities if the organization:

1. Implements and adheres to equity focused policies that:
 - a. Address the use of derogatory or inappropriate names, insults, verbal assaults, profanity, or ridicule that occurs at an interscholastic activity, including by spectators of the interscholastic activity;
 - b. Prohibit discrimination;
 - c. Permit a student to wear religious clothing in accordance with the student's sincerely held religious belief and consistent with any safety and health requirements; and
 - d. Balance the health, safety, and reasonable accommodation needs of participants on an activity-by-activity basis;
2. Maintains a transparent complaint process that:
 - a. Has a reporting system to allow participants of interscholastic activities or members of the public to make complaints about student, coach, or spectator behavior;
 - b. Responds to a complaint made within 48 hours of the complaint being received; and
 - c. Resolves a complaint within 30 days of the complaint being received unless the organization determines that there is good cause to extend the timeline for resolving the complaint;

¹ Interscholastic activities includes: for students any grade from kindergarten through grade 12, athletics, music, speech and other similar or related activities; for students in any grade from kindergarten through grade eight, activities that are offered only before or after regular school hours and that may, but are not required to, involve interaction among other schools.

² This applies to only OSAA sanctioned activities and events.

³ Includes a voluntary organization that administers interscholastic activities or that facilitates the scheduling and programming of interscholastic activities.

3. Develops and implements a system of sanctions against schools, students, coaches, and spectators if a complaint is verified; and
4. Performs an annual survey of students and their parents to understand and respond to potential violations of equity focused policies or other discrimination.

The district shall allow homeschooled students that reside in the district, students eligible to attend school and enrolled in a high school equivalency district or ESD provided General Education Development (GED) program⁴ that reside in the district, and students attending a public charter school that does not provide interscholastic activities that reside in the district, and students attending Milwaukie Academy of Arts the opportunity to participate in available interscholastic activities when the requirements found in Oregon law are met.

Interscholastic activities when provided by the district will comply with Title IX and other nondiscrimination laws.

District employees, students, parents, alumni, and activity volunteers are prohibited from inducing or attempting to induce a student to attend a district school for interscholastic activity eligibility or participation. The principal, activities director, advisors and coaches are each responsible for ensuring student participants meet all district and OSAA eligibility requirements of participation and those of the associated voluntary organization. The principal or designee school's athletic director is responsible for ensuring accurate certification regarding the eligibility of participating students and for verifying that athletic directors, coaches of sports, and activity advisors have all required certifications prior to assuming their duties. The principal or designee school's athletic director shall ensure that a program is in place to effectively evaluate the performance of all coaches and activity advisors under their supervision.

Volunteers may be approved to assist with district activities with prior approval from the principal or designee and successful completion of all required background checks.

The principal or designee shall investigate all allegations of district student ineligibility, staff recruitment violations or other student or staff conduct that may violate Board policies, administrative regulations, and/or the OSAA rules and regulations of the associated voluntary organization. The principal or designee shall notify the superintendent or designee of conduct that violates the terms of this policy and report to the associated voluntary organization if OSAA as required.

An employee determined to have violated Board policies and/or rules and regulations of the associated voluntary organization OSAA may be subject to discipline, up to and including, dismissal. A student in violation of Board policies and/or the OSAA rules and regulations of the associated voluntary organization will be subject to discipline, up to and including, dismissal from the interscholastic activity or program, suspension and/or expulsion from school. Volunteers in violation of Board policies and/or the OSAA rules and regulations of the associated voluntary organization shall be subject to discipline, up to and including, removal from district programs and activities and such other sanctions as may be deemed appropriate by the district.

⁴ "High school equivalency program" means a program provided to assist a student in earning a certificate for passing an approved high school equivalency test such as the General Educational Development (GED) test.

Employees, volunteers, or students in violation of such policies, the OSAA rules and/or regulations may be required to remunerate the district in the event of fines are assessed by the OSAA as a result of their actions.

The superintendent or designee will develop administrative regulations or procedures, as necessary, to implement this policy, including a process to ensure that all district rules governing the conduct of students, staff, and volunteers engaged in district activities are regularly reviewed and updated.

** As used in this policy, the term parent includes legal guardian or person in a parental relationship. The status and duties of a legal guardian are defined in ORS 125.005 (4) and 125.300 - 125.325. The determination of whether an individual is acting in a parental relationship, for purposes of determining residency, depends on the evaluation of the factors listed in ORS 419B.373. The determination for other purposes depends on evaluation of those factors and a power of attorney executed pursuant to ORS 109.056. For special education students, parent also includes a surrogate parent, an adult student to whom rights have transferred and foster parent as defined in OAR 581-015-2000.

END OF POLICY

Legal Reference(s):

[ORS 326.051](#)
[ORS 332.075\(1\)\(e\)](#)
[ORS 332.107](#)
[ORS 339.450 - 339.460](#)

[OAR 581-015-2255](#)
[OAR 581-021-0045 – 0049](#)
[OAR 581-022-2308\(2\)](#)
[OAR 581-026-0005](#)

[OAR 581-026-0700](#)
[OAR 581-026-0705](#)
[OAR 581-026-0710](#)

Title IX of the Education Amendments of 1972, 20 U.S.C. §§ 1681-1683 (2018); Nondiscrimination on the Basis of Sex in Education Programs or Activities Receiving Federal Financial Assistance, 34 C.F.R. Part 106 (2022).
Montgomery v. Bd. of Educ., 188 Or. App. 63 (2003).
Senate Bill 1522 (2022).

Cross Reference(s):

JHCA - Student Medical/Physical Examinations, Vision Screening/Eye Examinations and Dental Screenings



Code: ~~KGBKD~~
Adopted: 7/03/13
Revised/Readopted: 9/24/15; 9/22/16; 6/09/22

Public Conduct on District Property

Persons having no legitimate purpose or business on district property, or those violating or threatening to violate the following rules, may be ejected from the premises or issued a trespass citation, excluded from district-approved activities temporarily or permanently and/or referred to law enforcement officials.

No person on district property, including parking lots, shall:

1. Impede, delay or otherwise interfere with the orderly conduct of the district's educational program or any other activity taking place on district property which has been authorized by the district;
2. Bring, possess, conceal or use a weapon as prohibited by Board policy JFCJ - Weapons in the Schools and state and federal law;
3. Haze, harass, intimidate, bully, cyberbully or menace another, or engage in behavior deemed by the district to endanger the safety or well being of students, employees, self or others;
4. Possess, consume, sell, give or deliver unlawful drugs, drug paraphernalia and/or any alcoholic beverages;
5. Use, distribute or sell tobacco products or inhalant delivery systems, in any form, in accordance with the Pro-Children Act of 1994; ORS 433.835 to -433.990; and OAR 581-021-0110;
6. Use or engage in abusive verbal expression or physical conduct, especially if that conduct interferes with the performance of students, staff, event officials or sponsors of approved activities;
7. Damage the property of another or of the district;
8. Initiate or circulate a report, one knows to be false, concerning an alleged hazardous substance, impending fire, explosion, catastrophe or other emergency that will take place in or upon a school;
9. Construct or transport to district property for temporary or permanent purposes any structure not approved for construction on, or transportation, to district property;
10. Uproot, pick, cut, mutilate or remove plant life or other natural resources of any kind. Roots, tubers, flowers and stems may not be collected. Soil or rock may not be dug up or removed;
11. Dump or spill any sewage, waste water or other fluids from any person or vehicle;

12. Litter or use district waste containers or other district property for the deposit of waste or refuse generated from household, commercial, industrial, construction or other uses not related to approved use on district property;
13. Block, obstruct or interfere with vehicular or pedestrian traffic on any district road, parking area, walkway, pathway or common area. Occupying or impeding access to any district facility in a manner that interferes with the approved use of such facility by district employees, students or other authorized users, is prohibited;
14. Fly, launch or otherwise operate motorized model airplanes/helicopters/rockets/drones (unmanned aircraft system) or other similar devices unless granted permission by the superintendent or designee;
15. Distribute or post circulars, notices, leaflets, pamphlets or other written or printed material in violation of Board policy KJA - Materials Distribution;
16. Operate a concession, solicit, sell or offer for sale any goods, wares, merchandise, food, beverages or services without prior district approval. Public sales and solicitation on district property will be governed by Board policy KI/KJ - Commercial Advertising/Merchandise Sales;
17. Operate a motor vehicle in an area other than on roads and in parking areas constructed or designated for motor vehicle use without prior administrator approval. Vehicles shall be driven in a safe manner, at posted speeds and will only be appropriately parked in areas designated by the district. Motorized transportation devices such as minibikes, scooters, go-carts, all-terrain-vehicles, snowmobiles and other similar devices are prohibited on district grounds unless granted prior administrator approval. Bicyclists must comply with motor vehicle and bike regulatory signs;
18. Use a skateboard, rollerblades, scooter or similar device; unless the use is for supervised instructional or supervised extracurricular purposes and advance permission has been granted by the superintendent or designee.
19. Bring an animal into a district building without prior administrator approval and, where appropriate, only when proof of current rabies vaccination has been provided. Animals are prohibited on any synthetic turf surfaces. Animals are permitted on district grounds only when confined to a vehicle or on a leash and when kept under the physical control of the individual at all times. The owner is responsible for the animal's behavior and containment and for the removal of the animal's wastes while on district property. Animals serving persons with disabilities are permitted as provided by law;
20. Camp overnight, loiter or otherwise be present on district property after the conclusion of approved activities or as otherwise posted or authorized by the district. Individuals are prohibited from entering any portion of district premises at any other time for purposes other than those which are lawful and authorized by district officials;
21. Use or operate any noise-producing machine, vehicle, device or instrument in a manner that, in the judgment of district officials, is disturbing to, or interferes with, the orderly conduct of district programs or approved activities;
22. Wear, possess, use, distribute, display or sell any clothing, jewelry, emblem, badge, symbol, sign or other item that is evidence of membership or affiliation with any gang. Use speech or commit any

act or omission in furtherance of the interests of any gang or gang activity. A “gang” is defined as a group that identifies itself through the use of a name, unique appearance or language including hand signs, claiming of geographical territory or the espousing of a distinctive belief system that frequently results in criminal activity;

23. Violate posted regulatory signs; or
24. Willfully violate other district policies, administrative regulations or school rules designed to maintain public order on school property.

The superintendent will ensure that appropriate notice of these rules is provided.

END OF POLICY

Legal Reference(s):

ORS 161.015	ORS 166.210 to -166.370	ORS 433.835 to -433.990
ORS 164.245	ORS 332.172	ORS 806.060 to -806.080
ORS 164.255	ORS 336.109	OAR 333-015-0025 to -0090
ORS 166.025	ORS 339.883	OAR 581-021-0110
ORS 166.155 to -166.165	ORS 431.840	OAR 584-020-0040(4)(e),(g)

Gun-Free Schools Act, 20 U.S.C. § 7961 (2012).

Pro-Children Act of 1994, 20 U.S.C. §§ 6081-6084 (2012).

Gun-Free School Zones Act of 1990, 18 U.S.C. §§ 921(a)(25)-(26), 922(q) (2012).

Cross Reference(s):

ECAB - Vandalism/Malicious Mischief/Theft

ECD - Traffic and Parking Controls

KG - Community Use of District Facilities

Policy re-lettered, DATE

**DETERMINING ELECTION RESULTS OF
LOCAL OPTION LEVY MEASURE**

DISCUSSION/ACTION

Action Item #7
December 7, 2023

SUPERINTENDENT’S RECOMMENDATION:

Superintendent recommends Board approval of the voter results from the November 7, 2023 Local Option Levy measure election.

REASON FOR BOARD CONSIDERATION:

The election was duly and legally held on November 7, 2023 and the elections officer of Clackamas County in which the District office is located certified that the issuance of a local option levy was approved by a majority of the qualified voters of the District voting at the election.

Following receipt of the abstract of votes from the county elections officer, the Board is to verify receipt and make a determination of it as the official election pursuant to ORS 255.295.

BACKGROUND:

On June 8, 2023, the Board adopted a resolution authorizing submission to the voters of the District a local option levy measure election on November 7, 2023.

The ballot caption for Measure 3-599 was “Local Option Levy Renewal To Maintain Teaching Positions, Classroom Programs” and the ballot question was “Shall District renew levy to retain teachers, classroom programs at \$1.63 per \$1,000 assessed value for five years beginning 2024? This measure renews current local option taxes.”

The election was held on November 7, 2023. The results of the election are attached.

ATTACHMENT:

Official Voting Results – Measure 3-599 – Clackamas County

PRESENTER / STAFF CONTACT:

Tiffany Shireman, Chief of Staff

Canvass Results Report

Official Ballots

Run Time 3:46 PM
Run Date 11/30/2023

Clackamas County

November 7, 2023 Special Election

11/7/2023

Page 3

Official Results

Registered Voters
49016 of 151881 = 32.27%

Precincts Reporting
55 of 55 = 100.00%

North Clackamas School District Measure 3-599 - Referred to the People by the District Board

Precinct	Yes	No	Cast Votes	Undervotes	Overvotes	Miscellaneous Write-ins	Vote by Mail Ballots Cast	Total Ballots Cast	Registered Voters	Turnout Percentage
100	26	4	30	0	0	0	30	30	120	25.00%
101	1,593	649	2,242	0	0	0	2,242	2,242	7,952	28.19%
102	65	30	95	0	0	0	95	95	413	23.00%
103	863	386	1,249	0	0	0	1,249	1,249	3,551	35.17%
104	0	0	0	0	0	0	0	0	30	0.00%
105	1,261	526	1,787	1	1	0	1,789	1,789	4,940	36.21%
113	20	9	29	0	0	0	29	29	73	39.73%
114	39	19	58	0	0	0	58	58	247	23.48%
115	37	10	47	0	0	0	47	47	120	39.17%
400 / 410	837	268	1,105	1	1	0	1,107	1,107	4,800	23.06%
411	1,202	592	1,794	2	0	0	1,796	1,796	5,510	32.60%
412	453	337	790	0	0	0	790	790	2,547	31.02%
413	49	14	63	0	0	0	63	63	326	19.33%
414	200	59	259	0	0	0	259	259	847	30.58%
415	91	87	178	0	0	0	178	178	461	38.61%
416	765	308	1,073	1	1	0	1,075	1,075	3,495	30.76%
417	62	19	81	0	0	0	81	81	667	12.14%
419	568	253	821	1	0	0	822	822	2,814	29.21%
420	553	231	784	0	0	0	88 784	784	2,028	38.66%
421	615	189	804	0	1	0	805	805	3,923	20.52%

Canvass Results Report

Official Ballots

Run Time 3:46 PM
Run Date 11/30/2023

Clackamas County

November 7, 2023 Special Election

11/7/2023

Page 4

Official Results

Registered Voters
49016 of 151881 = 32.27%

Precincts Reporting
55 of 55 = 100.00%

North Clackamas School District Measure 3-599 - Referred to the People by the District Board

Precinct	Yes	No	Cast Votes	Undervotes	Overvotes	Miscellaneous Writelines	Vote by Mail Ballots Cast	Total Ballots Cast	Registered Voters	Turnout Percentage
422	944	345	1,289	1	0	0	1,290	1,290	6,409	20.13%
500	369	139	508	1	0	0	509	509	1,705	29.85%
501	1,610	324	1,934	1	0	0	1,935	1,935	4,794	40.36%
502	1,303	461	1,764	1	1	0	1,766	1,766	5,465	32.31%
503	1,167	468	1,635	2	2	0	1,639	1,639	4,030	40.67%
504	488	217	705	0	1	0	706	706	2,353	30.00%
506	840	390	1,230	0	0	0	1,230	1,230	3,850	31.95%
618	78	16	94	2	0	0	96	96	281	34.16%
620	67	30	97	0	0	0	97	97	359	27.02%
622	800	204	1,004	0	0	0	1,004	1,004	2,847	35.27%
626	1,407	296	1,703	2	0	0	1,705	1,705	5,231	32.59%
628	294	112	406	0	0	0	406	406	1,188	34.18%
630	1,880	566	2,446	2	0	0	2,448	2,448	6,600	37.09%
Totals	20,546	7,558	28,104	18	8	0	28,130	28,130	89,976	31.26%

CERTIFIED COPY OF THE ORIGINAL
CATHERINE MCMULLEN, COUNTY CLERK
 BY: *[Signature]*

**STUDENT SUCCESS ACT: STUDENT INVESTMENT
ACCOUNT AGREEMENT**

DISCUSSION/ACTION

Agenda Item #8
December 7, 2023

SUPERINTENDENT’S RECOMMENDATION:

Board approval of the Student Investment Account grant agreement with the Oregon Department of Education.

ORIGINATED BY:

Per the Oregon Department of Education, the Student Investment Account grant agreement, which has the Longitudinal Performance Growth Targets (LPGTs) embedded, is required to be:

- Presented and approved by the governing board at an open meeting with the opportunity for public comment (cannot be a consent agenda item), and
- Made available on the district webpage and at the district office.

BUDGET IMPACT/SOURCE OF FUNDS:

The allocation for 2023-2024 from the Student Investment Account to North Clackamas School District is \$15,696,316.62.

BACKGROUND:

For the 2023-2024 school year, the North Clackamas School District expects to access a total of \$15,696,316.62 from the Student Investment Account.

Per the Student Success Act (2019), funds in the Student Investment Account must be allocated by districts to provide funding to assist in meeting students’ mental or behavioral health needs, and increasing academic achievement and reducing academic disparities for students from racial or ethnic groups that have historically experienced academic disparities, students with disabilities, English language learners, economically disadvantaged students, students who are homeless, and students who are foster children.

Key themes emerged from the district’s need assessment which included a data review and community, staff, student engagement process. The themes that were identified as most urgent were:

- Class size/Caseload reduction.
- Providing a well rounded, equitable education where students see themselves reflected in the staff, curriculum, and instructional practices.
- Increasing academic achievement of students while reducing barriers and academic disparities for focal student groups.
- Supporting the behavioral and mental health needs of students and families.
- Providing ongoing and meaningful community engagement that is inclusive of race, culture, and linguistics.

These themes of the most urgent needs helped inform the development of the plan for the Student Investment Account funds. The School Board presentation on February 23, 2023 shared how the district proposed to invest these funds.

ATTACHMENTS:

- A. Student Investment Account grant agreement
- B. Presentation slide deck

PRESENTER / STAFF CONTACT:

Ivonne Dibblee, Assistant Superintendent of Education

Jennifer Dove-Kiltow-Director of Student & Family Services/Integrated Programs

STATE OF OREGON GRANT AGREEMENT

“Student Success Act – Student Investment Account”

Grant No. 34440

This Grant Agreement (“Grant”) is between the State of Oregon acting by and through its Department of Education (“Agency”) and North Clackamas SD 12 (“Grantee”), each a “Party” and, together, the “Parties”.

SECTION 1: AUTHORITY

Pursuant to the “Student Success Act”, codified at 2019 Oregon Laws Chapter 122 and as amended from time to time (the “Act”). ORS 327.175 Student Investment Account (4) Moneys in the Student Investment Account are continuously appropriated to the Department of Education for the purposes of distributing grants under ORS 327.195.

SECTION 2: PURPOSE

The purpose of this grant is to provide funding to assist in meeting students’ mental or behavioral health needs, and increasing academic achievement and reducing academic disparities for students from racial or ethnic groups that have historically experienced academic disparities, students with disabilities, English language learners, economically disadvantaged students, students who are homeless, and students who are foster children.

SECTION 3: EFFECTIVE DATE AND DURATION

When all Parties have executed this Grant, and all necessary approvals have been obtained (“Executed Date”), this Grant is effective and has a Grant funding start date as of July 1, 2023 (“Effective Date”), and, unless extended or terminated earlier in accordance with its terms, will expire on September 30, 2024.

SECTION 4: GRANT MANAGERS

4.1 Agency’s Grant Manager is:

Cassie Medina
Office of Education Innovation & Improvement
255 Capitol St NE
Salem, OR 97310-0203
cassie.medina@ode.oregon.gov

4.2 Grantee’s Grant Manager is:

Shay James
North Clackamas SD 12
12400 SE Freeman Way
Milwaukie, OR 97222

4.3 A Party may designate a new Grant Manager by written notice to the other Party.

SECTION 5: PROJECT ACTIVITIES

Grantee must perform the project activities set forth in Exhibit A (the “Project”), attached hereto and incorporated in this Grant by this reference, for the period beginning on the Effective Date and ending on the expiration date set forth in Section 3 (the “Performance Period”).

SECTION 6: GRANT FUNDS

In accordance with the terms and conditions of this Grant, Agency will provide Grantee up to \$15,696,316.62 (“Grant Funds”) for the Project. Agency will pay the Grant Funds from monies available in the Student Investment Account (“Funding Source”). A reduction in the monies in the Funding Source may result in a decrease in Grant Funds available to Agency.

SECTION 7: DISBURSEMENT GENERALLY

7.1 Disbursement.

- 7.1.1** Subject to the availability of sufficient moneys in and from the Funding Source based on Agency’s reasonable projections of moneys accruing to the Funding Source, Agency will disburse Grant Funds to Grantee for the allowable Project activities described in Exhibit A that are undertaken during the Performance Period.
- 7.1.2** Grantee must provide to Agency any information or detail regarding the expenditure of Grant Funds required under Exhibit A prior to disbursement or as Agency may request.
- 7.1.3** Agency will only disburse Grant Funds to Grantee for activities completed or materials produced, that, if required by Exhibit A, are approved by Agency. If Agency determines any completed Project activities or materials produced are not acceptable and any deficiencies are the responsibility of Grantee, Agency will prepare a detailed written description of the deficiencies within 15 days of receipt of the materials or performance of the activity, and will deliver such notice to Grantee. Grantee must correct any deficiencies at no additional cost to Agency within 15 days. Grantee may resubmit a request for disbursement that includes evidence satisfactory to Agency demonstrating

deficiencies were corrected.

7.2 Conditions Precedent to Disbursement. Agency’s obligation to disburse Grant Funds to Grantee under this Grant is subject to satisfaction of each of the following conditions precedent:

7.2.1 Agency has received sufficient funding, appropriations, expenditure limitation, allotments or other necessary expenditure authorizations to allow Agency, in the exercise of its reasonable administrative discretion, to make the disbursement from the Funding Source;

7.2.2 No default as described in Section 15 has occurred; and

7.2.3 Grantee’s representations and warranties set forth in Section 8 are true and correct on the date of disbursement(s) with the same effect as though made on the date of disbursement.

7.3 No Duplicate Payment. Grantee may use other funds in addition to the Grant Funds to complete the Project; provided, however, the Grantee may not credit or pay any Grant Funds for Project costs that are paid for with other funds and would result in duplicate funding.

7.4 Suspension of Funding and Project. Agency may by written notice to Grantee, temporarily cease funding and require Grantee to stop all, or any part, of the Project dependent upon Grant Funds for a period of up to 180 days after the date of the notice, if Agency has or reasonably projects that it will have insufficient funds from the Funding Source to disburse the full amount of the Grant Funds. Upon receipt of the notice, Grantee must immediately cease all Project activities dependent on Grant Funds, or if that is impossible, must take all necessary steps to minimize the Project activities allocable to Grant Funds.

If Agency subsequently projects that it will have sufficient funds, Agency will notify Grantee that it may resume activities. If sufficient funds do not become available, Grantee and Agency will work together to amend this Grant to revise the amount of Grant Funds and Project activities to reflect the available funds. If sufficient funding does not become available or an amendment is not agreed to within a period of 180 days after issuance of the notice, Agency will either (i) cancel or modify its cessation order by a supplemental written notice or (ii) terminate this Grant as permitted by either the termination at Agency’s discretion or for cause provisions of this Grant.

SECTION 8: REPRESENTATIONS AND WARRANTIES

8.1 Organization/Authority. Grantee represents and warrants to Agency that:

8.1.1 Grantee is a District duly organized and validly existing;

8.1.2 Grantee has all necessary rights, powers and authority under any organizational documents and under Oregon Law to (i) execute this Grant, (ii) incur and perform its obligations under this Grant, and (iii) receive financing, including the Grant Funds, for the Project;

8.1.3 This Grant has been duly executed by Grantee and when executed by Agency, constitutes a legal, valid and binding obligation of Grantee enforceable in accordance with its terms;

8.1.4 If applicable and necessary, the execution and delivery of this Grant by Grantee has been authorized by an ordinance, order or resolution of its governing body, or voter approval, that was adopted in accordance with applicable law and requirements for filing public notices and holding public meetings; and

8.1.5 There is no proceeding pending or threatened against Grantee before any court or governmental authority that if adversely determined would materially adversely affect the Project or the ability of Grantee to carry out the Project.

8.2 False Claims Act. Grantee acknowledges the Oregon False Claims Act, ORS 180.750 to 180.785, applies to any “claim” (as defined by ORS 180.750) made by (or caused by) Grantee that pertains to this Grant or to the Project. Grantee certifies that no claim described in the previous sentence is or will be a “false claim” (as defined by ORS 180.750) or an act prohibited by ORS 180.755. Grantee further acknowledges in addition to the remedies under Section 16, if it makes (or causes to be made) a false claim or performs (or causes to be performed) an act prohibited under the Oregon False Claims Act, the Oregon Attorney General may enforce the liabilities and penalties provided by the Oregon False Claims Act against the Grantee.

8.3 No limitation. The representations and warranties set forth in this Section are in addition to, and not in lieu of, any other representations or warranties provided by Grantee.

SECTION 9: OWNERSHIP

9.1 Intellectual Property Definitions. As used in this Section and elsewhere in this Grant, the following terms have the meanings set forth below:

“Third Party Intellectual Property” means any intellectual property owned by parties other than Grantee or Agency.

“Work Product” means every invention, discovery, work of authorship, trade secret or other tangible or intangible item Grantee is required to create or deliver as part of the Project, and all intellectual property rights therein.

- 9.2 Grantee Ownership.** Grantee must deliver copies of all Work Product as directed in Exhibit A. Grantee retains ownership of all Work Product, and grants Agency an irrevocable, non-exclusive, perpetual, royalty-free license to use, to reproduce, to prepare derivative works based upon, to distribute, to perform and to display the Work Product, to authorize others to do the same on Agency’s behalf, and to sublicense the Work Product to other entities without restriction.
- 9.3 Third Party Ownership.** If the Work Product created by Grantee under this Grant is a derivative work based on Third Party Intellectual Property, or is a compilation that includes Third Party Intellectual Property, Grantee must secure an irrevocable, non-exclusive, perpetual, royalty-free license allowing Agency and other entities the same rights listed above for the pre-existing element of the Third party Intellectual Property employed in the Work Product. If state or federal law requires that Agency or Grantee grant to the United States a license to any intellectual property in the Work Product, or if state or federal law requires Agency or the United States to own the intellectual property in the Work Product, then Grantee must execute such further documents and instruments as Agency may reasonably request in order to make any such grant or to assign ownership in such intellectual property to the United States or Agency.
- 9.4 Real Property.** If the Project includes the acquisition, construction, remodel or repair of real property or improvements to real property, Grantee may not sell, transfer, encumber, lease or otherwise dispose of any real property or improvements to real property paid for with Grant Funds for a period of six (6) years after the Effective Date of this Grant without the prior written consent of the Agency.

SECTION 10: CONFIDENTIAL INFORMATION

- 10.1 Confidential Information Definition.** Grantee acknowledges it and its employees or agents may, in the course of performing its responsibilities, be exposed to or acquire information that is: (i) confidential to Agency or Project participants or (ii) the disclosure of which is restricted under federal or state law, including without limitation: (a) personal information, as that term is used in ORS 646A.602(12), (b) social security numbers, and (c) information protected by the federal Family Educational Rights and Privacy Act under 20 USC § 1232g (items (i) and (ii) separately and collectively “Confidential Information”).
- 10.2 Nondisclosure.** Grantee agrees to hold Confidential Information as required by any applicable law and in all cases in strict confidence, using at least the same degree of care Grantee uses in maintaining the confidentiality of its own confidential information. Grantee may not copy, reproduce, sell, assign, license, market, transfer or otherwise dispose of, give, or disclose Confidential Information to third parties, or use Confidential Information except as is allowed by law and for the Project activities and Grantee must advise each of its employees and agents of these restrictions. Grantee must assist Agency in identifying and

preventing any unauthorized use or disclosure of Confidential Information. Grantee must advise Agency immediately if Grantee learns or has reason to believe any Confidential Information has been, or may be, used or disclosed in violation of the restrictions in this Section. Grantee must, at its expense, cooperate with Agency in seeking injunctive or other equitable relief, in the name of Agency or Grantee, to stop or prevent any use or disclosure of Confidential Information. At Agency's request, Grantee must return or destroy any Confidential Information. If Agency requests Grantee to destroy any Confidential Information, Grantee must provide Agency with written assurance indicating how, when and what information was destroyed.

- 10.3 Identity Protection Law.** Grantee must have and maintain a formal written information security program that provides safeguards to protect Confidential Information from loss, theft, and disclosure to unauthorized persons, as required by the Oregon Consumer Information Protection Act, ORS 646A.600-628. If Grantee or its agents discover or are notified of a potential or actual "Breach of Security", as defined by ORS 646A.602(1)(a), or a failure to comply with the requirements of ORS 646A.600-628, (collectively, "Breach") with respect to Confidential Information, Grantee must promptly but in any event within one calendar day (i) notify the Agency Grant Manager of such Breach and (ii) if the applicable Confidential Information was in the possession of Grantee or its agents at the time of such Breach, Grantee must (a) investigate and remedy the technical causes and technical effects of the Breach and (b) provide Agency with a written root cause analysis of the Breach and the specific steps Grantee will take to prevent the recurrence of the Breach or to ensure the potential Breach will not recur. For the avoidance of doubt, if Agency determines notice is required of any such Breach to any individual(s) or entity(ies), Agency will have sole control over the timing, content, and method of such notice, subject to Grantee's obligations under applicable law.
- 10.4 Subgrants/Contracts.** Grantee must require any subgrantees, contractors or subcontractors under this Grant who are exposed to or acquire Confidential Information to treat and maintain such information in the same manner as is required of Grantee under subsections 10.1 and 10.2 of this Section.
- 10.5 Background Check.** If requested by Agency and permitted by law, Grantee's employees, agents, contractors, subcontractors, and volunteers that perform Project activities must agree to submit to a criminal background check prior to performance of any Project activities or receipt of Confidential Information. Background checks will be performed at Grantee's expense. Based on the results of the background check, Grantee or Agency may refuse or limit (i) the participation of any Grantee employee, agent, contractor, subgrantee, or volunteer, in Project activities or (ii) access to Agency Personal Information or Grantee premises.

SECTION 11: INDEMNITY/LIABILITY

- 11.1 Indemnity.** Grantee must defend, save, hold harmless, and indemnify the State of Oregon and Agency and their officers, employees and agents from and against all claims, suits, actions, losses, damages, liabilities, costs, and expenses of any nature whatsoever, including attorneys' fees, resulting from, arising out of, or relating to the activities of Grantee or its officers, employees, subgrantees, contractors, subcontractors, or agents under this Grant (each of the foregoing individually or collectively a "Claim" for purposes of this Section)..
- 11.2 Defense.** Grantee may have control of the defense and settlement of any Claim subject to this Section. But neither Grantee nor any attorney engaged by Grantee may defend the Claim in the name of the State of Oregon, nor purport to act as legal representative of the State of Oregon or any of its agencies, without first receiving from the Attorney General, in a form and manner determined appropriate by the Attorney General, authority to act as legal counsel for the State of Oregon. Nor may Grantee settle any Claim on behalf of the State of Oregon without the approval of the Attorney General. The State of Oregon may, at its election and expense, assume its own defense and settlement in the event the State of Oregon determines Grantee is prohibited from defending the State of Oregon, or is not adequately defending the State of Oregon's interests, or an important governmental principle is at issue and the State of Oregon desires to assume its own defense. Grantee may not use any Grant Funds to reimburse itself for the defense of or settlement of any Claim.
- 11.3 Limitation.** Except as provided in this Section, neither Party will be liable for incidental, consequential, or other direct damages arising out of or related to this Grant, regardless of whether the damages or other liability is based in contract, tort (including negligence), strict liability, product liability or otherwise. Neither Party will be liable for any damages of any sort arising solely from the termination of this Grant in accordance with its terms.

SECTION 12: INSURANCE

- 12.1 Private Insurance.** If Grantee is a private entity, or if any contractors, subcontractors, or subgrantees used to carry out the Project are private entities, Grantee and any private contractors, subcontractors or subgrantees must obtain and maintain insurance covering Agency in the types and amounts indicated in Exhibit C.
- 12.2 Public Body Insurance.** If Grantee is a "public body" as defined in ORS 30.260, Grantee agrees to insure any obligations that may arise for Grantee under this Grant, including any indemnity obligations, through (i) the purchase of insurance as indicated in Exhibit C or (ii) the use of self-insurance or assessments paid under ORS 30.282 that is substantially similar to the types and amounts of insurance coverage indicated on Exhibit C, or (iii) a combination of any or all of the foregoing.
- 12.3 Real Property.** If the Project includes the construction, remodel or repair of real property or improvements to real property, Grantee must insure the real property and improvements against liability and risk of direct physical loss, damage or destruction at

least to the extent that similar insurance is customarily carried by entities constructing, operating and maintaining similar property or facilities.

SECTION 13: GOVERNING LAW, JURISDICTION

This Grant is governed by and construed in accordance with the laws of the State of Oregon without regard to principles of conflicts of law. Any claim, action, suit or proceeding (collectively “Claim”) between Agency or any other agency or department of the State of Oregon, or both, and Grantee that arises from or relates to this Grant must be brought and conducted solely and exclusively within the Circuit Court of Marion County for the State of Oregon; provided, however, if a Claim must be brought in a federal forum, then it will be brought and conducted solely and exclusively within the United States District Court for the District of Oregon. In no event may this Section be construed as a waiver by the State of Oregon of any form of defense or immunity, whether sovereign immunity, governmental immunity, immunity based on the eleventh amendment to the Constitution of the United States or otherwise, to or from any Claim or from the jurisdiction of any court. GRANTEE, BY EXECUTION OF THIS GRANT, HEREBY CONSENTS TO THE PERSONAL JURISDICTION OF SUCH COURTS.

SECTION 14: ALTERNATIVE DISPUTE RESOLUTION

The Parties should attempt in good faith to resolve any dispute arising out of this Grant. This may be done at any management level, including at a level higher than persons directly responsible for administration of the Grant. In addition, the Parties may agree to utilize a jointly selected mediator or arbitrator (for non-binding arbitration) to resolve the dispute short of litigation. Each Party will bear its own costs incurred for any mediation or non-binding arbitration.

SECTION 15: DEFAULT

- 15.1 Grantee.** Grantee will be in default under this Grant upon the occurrence of any of the following events:
- 15.1.1** Grantee fails to use the Grant Funds for the intended purpose described in Exhibit A or otherwise fails to perform, observe or discharge any of its covenants, agreements or obligations under this Grant;
 - 15.1.2** Any representation, warranty or statement made by Grantee in this Grant or in any documents or reports relied upon by Agency to measure the Project, the expenditure of Grant Funds or the performance by Grantee is untrue in any material respect when made; or
 - 15.1.3** A petition, proceeding or case is filed by or against Grantee under any federal or state bankruptcy, insolvency, receivership or other law relating to reorganization, liquidation, dissolution, winding-up or adjustment of debts; in the case of a petition filed

against Grantee, Grantee acquiesces to such petition or such petition is not dismissed within 20 calendar days after such filing, or such dismissal is not final or is subject to appeal; or Grantee becomes insolvent or admits its inability to pay its debts as they become due, or Grantee makes an assignment for the benefit of its creditors.

- 15.2 Agency.** Agency will be in default under this Grant if, after 15 days written notice specifying the nature of the default, Agency fails to perform, observe or discharge any of its covenants, agreements, or obligations under this Grant; provided, however, Agency will not be in default if Agency fails to disburse Grant Funds because there is insufficient expenditure authority for, or moneys available from, the Funding Source.

SECTION 16: REMEDIES

- 16.1 Agency Remedies.** In the event Grantee is in default under Section 15.1, Agency may, at its option, pursue any or all of the remedies available to it under this Grant and at law or in equity, including, but not limited to: (i) termination of this Grant under Section 18.2, (ii) reducing or withholding payment for Project activities or materials that are deficient or Grantee has failed to complete by any scheduled deadlines, (iii) requiring Grantee to complete, at Grantee's expense, additional activities necessary to satisfy its obligations or meet performance standards under this Grant, (iv) initiation of an action or proceeding for damages, specific performance, or declaratory or injunctive relief, (v) exercise of its right of recovery of overpayments under Section 17 of this Grant or setoff, or both, or (vi) declaring Grantee ineligible for the receipt of future awards from Agency. These remedies are cumulative to the extent the remedies are not inconsistent, and Agency may pursue any remedy or remedies singly, collectively, successively or in any order whatsoever.
- 16.2 Grantee Remedies.** In the event Agency is in default under Section 15.2 and whether or not Grantee elects to terminate this Grant, Grantee's sole monetary remedy will be, within any limits set forth in this Grant, reimbursement of Project activities completed and accepted by Agency and authorized expenses incurred, less any claims Agency has against Grantee. In no event will Agency be liable to Grantee for any expenses related to termination of this Grant or for anticipated profits.

SECTION 17: WITHHOLDING FUNDS, RECOVERY

Agency may withhold from disbursements of Grant Funds due to Grantee, or Grantee must return to Agency within 30 days of Agency's written demand:

- 17.1** Any Grant Funds paid to Grantee under this Grant, or payments made under any other agreement between Agency and Grantee, that exceed the amount to which Grantee is entitled;
- 17.2** Any Grant Funds received by Grantee that remain unexpended or contractually committed for payment of the Project at the end of the Performance Period;

17.3 Any Grant Funds determined by Agency to be spent for purposes other than allowable Project activities; or

17.4 Any Grant Funds requested by Grantee as payment for deficient activities or materials.

SECTION 18: TERMINATION

18.1 **Mutual.** This Grant may be terminated at any time by mutual written consent of the Parties.

18.2 **By Agency.** Agency may terminate this Grant as follows:

18.2.1 At Agency's discretion, upon 30 days advance written notice to Grantee;

18.2.2 Immediately upon written notice to Grantee, if Agency fails to receive funding, or appropriations, limitations or other expenditure authority at levels sufficient in Agency's reasonable administrative discretion, to perform its obligations under this Grant;

18.2.3 Immediately upon written notice to Grantee, if federal or state laws, rules, regulations or guidelines are modified or interpreted in such a way that Agency's performance under this Grant is prohibited or Agency is prohibited from funding the Grant from the Funding Source; or

18.2.4 Immediately upon written notice to Grantee, if Grantee is in default under this Grant and such default remains uncured 15 days after written notice thereof to Grantee.

18.3 **By Grantee.** Grantee may terminate this Grant as follows:

18.3.1 If Grantee is a governmental entity, immediately upon written notice to Agency, if Grantee fails to receive funding, or appropriations, limitations or other expenditure authority at levels sufficient to perform its obligations under this Grant.

18.3.2 If Grantee is a governmental entity, immediately upon written notice to Agency, if applicable laws, rules, regulations or guidelines are modified or interpreted in such a way that the Project activities contemplated under this Grant are prohibited by law or Grantee is prohibited from paying for the Project from the Grant Funds or other planned Project funding; or

18.3.3 Immediately upon written notice to Agency, if Agency is in default under this Grant and such default remains uncured 15 days after written notice thereof to Agency.

18.4 **Cease Activities.** Upon receiving a notice of termination of this Grant, Grantee must immediately cease all activities under this Grant, unless Agency expressly directs otherwise in such notice. Upon termination, Grantee must deliver to Agency all materials or other property that are or would be required to be provided to Agency under this Grant or that are needed to complete the Project activities that would have been performed by Grantee.

SECTION 19: MISCELLANEOUS

- 19.1 Conflict of Interest.** Grantee by signature to this Grant declares and certifies the award of this Grant and the Project activities to be funded by this Grant, create no potential or actual conflict of interest, as defined by ORS Chapter 244, for a director, officer or employee of Grantee.
- 19.2 Nonappropriation.** Agency's obligation to pay any amounts and otherwise perform its duties under this Grant is conditioned upon Agency receiving funding, appropriations, limitations, allotments, or other expenditure authority sufficient to allow Agency, in the exercise of its reasonable administrative discretion, to meet its obligations under this Grant. Nothing in this Grant may be construed as permitting any violation of Article XI, Section 7 of the Oregon Constitution or any other law limiting the activities, liabilities or monetary obligations of Agency.
- 19.3 Amendments.** The terms of this Grant may not be altered, modified, supplemented or otherwise amended, except by written agreement of the Parties.
- 19.4 Notice.** Except as otherwise expressly provided in this Grant, any notices to be given under this Grant must be given in writing by email, personal delivery, or postage prepaid mail, to a Party's Grant Manager at the physical address or email address set forth in this Grant, or to such other addresses as either Party may indicate pursuant to this Section. Any notice so addressed and mailed becomes effective five (5) days after mailing. Any notice given by personal delivery becomes effective when actually delivered. Any notice given by email becomes effective upon the sender's receipt of confirmation generated by the recipient's email system that the notice has been received by the recipient's email system.
- 19.5 Survival.** All rights and obligations of the Parties under this Grant will cease upon termination of this Grant, other than the rights and obligations arising under Sections 11, 13, 14, 16, 17 and subsection 19.5 hereof and those rights and obligations that by their express terms survive termination of this Grant; provided, however, termination of this Grant will not prejudice any rights or obligations accrued to the Parties under this Grant prior to termination.
- 19.6 Severability.** The Parties agree if any term or provision of this Grant is declared by a court of competent jurisdiction to be illegal or in conflict with any law, the validity of the remaining terms and provisions will not be affected, and the rights and obligations of the Parties will be construed and enforced as if the Grant did not contain the particular term or provision held to be invalid.
- 19.7 Counterparts.** This Grant may be executed in several counterparts, all of which when taken together constitute one agreement, notwithstanding that all Parties are not signatories to the same counterpart. Each copy of the Grant so executed constitutes an original.
- 19.8 Compliance with Law.** In connection with their activities under this Grant, the Parties must comply with all applicable federal, state and local laws.

- 19.9 Intended Beneficiaries.** Agency and Grantee are the only parties to this Grant and are the only parties entitled to enforce its terms. Nothing in this Grant provides, is intended to provide, or may be construed to provide any direct or indirect benefit or right to third persons unless such third persons are individually identified by name herein and expressly described as intended beneficiaries of this Grant.
- 19.10 Assignment and Successors.** Grantee may not assign or transfer its interest in this Grant without the prior written consent of Agency and any attempt by Grantee to assign or transfer its interest in this Grant without such consent will be void and of no force or effect. Agency’s consent to Grantee’s assignment or transfer of its interest in this Grant will not relieve Grantee of any of its duties or obligations under this Grant. The provisions of this Grant will be binding upon and inure to the benefit of the Parties hereto, and their respective successors and permitted assigns.
- 19.11 Contracts and Subgrants.** Grantee may not, without Agency’s prior written consent, enter into any contracts or subgrants for any of the Project activities required of Grantee under this Grant. Agency’s consent to any contract or subgrant will not relieve Grantee of any of its duties or obligations under this Grant.
- 19.12 Time of the Essence.** Time is of the essence in Grantee’s performance of the Project activities under this Grant.
- 19.13 Records Maintenance and Access.** Grantee must maintain all financial records relating to this Grant in accordance with generally accepted accounting principles. In addition, Grantee must maintain any other records, whether in paper, electronic or other form, pertinent to this Grant in such a manner as to clearly document Grantee’s performance. All financial records and other records, whether in paper, electronic or other form, that are pertinent to this Grant, are collectively referred to as “Records.” Grantee acknowledges and agrees Agency and the Oregon Secretary of State’s Office and the federal government and their duly authorized representatives will have access to all Records to perform examinations and audits and make excerpts and transcripts. Grantee must retain and keep accessible all Records for a minimum of six (6) years, or such longer period as may be required by applicable law, following termination of this Grant, or until the conclusion of any audit, controversy or litigation arising out of or related to this Grant, whichever date is later.
- 19.14 Headings.** The headings and captions to sections of this Grant have been inserted for identification and reference purposes only and may not be used to construe the meaning or to interpret this Grant.
- 19.15 Grant Documents.** This Grant consists of the following documents, which are incorporated by this reference and listed in descending order of precedence:
- This Grant less all exhibits
 - Exhibit A (the “Project”)
 - Exhibit B (Common and Customized Framework)
 - Exhibit C (Insurance)

19.16 Merger, Waiver. This Grant and all exhibits and attachments, if any, constitute the entire agreement between the Parties on the subject matter hereof. There are no understandings, agreements, or representations, oral or written, not specified herein regarding this Grant. No waiver or consent under this Grant binds either Party unless in writing and signed by both Parties. Such waiver or consent, if made, is effective only in the specific instance and for the specific purpose given.

SECTION 20: SIGNATURES

EACH PARTY, BY SIGNATURE OF ITS AUTHORIZED REPRESENTATIVE, HEREBY ACKNOWLEDGES IT HAS READ THIS GRANT, UNDERSTANDS IT, AND AGREES TO BE BOUND BY ITS TERMS AND CONDITIONS.

IN WITNESS WHEREOF, the Parties have executed this Grant as of the dates set forth below.

STATE OF OREGON acting by and through its Department of Education

By: Philip Hofmann
Contracting Officer

11/08/2023
Date

North Clackamas SD 12

By: _____
Authorized Signature

Date

Printed Name

Title

Federal Tax ID Number

Approved for Legal Sufficiency in accordance with ORS 291.047

By: Jake Hogue
Assistant Attorney General

November 8, 2023, via email
Date

EXHIBIT A THE PROJECT

SECTION I – BACKGROUND AND GOALS

Signed into law in May of 2019, the Student Success Act (SSA) is a historic opportunity for Oregon schools. The law is rooted in equity, authentic community engagement and shared accountability for student success.

SSA establishes the Student Investment Account (SIA) to provide Oregon school districts and eligible charter schools with access to non-competitive grant funds. Each SIA applicant is required to work alongside educators, students, families, and their community to develop a plan and outline priorities and activities that align to the allowable uses in the law.

The SIA grants are for two purposes:

- 1) Meeting students’ mental or behavioral health needs, and
- 2) Increasing academic achievement and reducing academic disparities for students from racial or ethnic groups that have historically experienced academic disparities, students with disabilities, English language learners, economically disadvantaged students, students who are homeless, and students who are foster children.

SECTION II – PROJECT DEFINITIONS

The following capitalized terms have the meanings assigned below for purposes of Exhibits A and B.

“Act” means the “Student Success Act” codified in 2019 Oregon Laws Chapter 122, as amended from time to time, inclusive.

“Allowable Costs of the Project” means Grantee’s actual costs that are reasonable, necessary and directly related to the implementation of the Integrated Plan and are allowable uses of the Grant Funds under the Act.

“Baseline Targets” means the minimum expectations for improvement set forth in the Integrated Plan by the district in either: (i) raising academic achievement or (ii) reducing academic disparities and closing gaps, as further defined in the December 2019 “Guidance for Eligible Applicants”.

“Common Metrics” means the Five-Year Completion Rate, Third-Grade Reading Proficiency Rate, Ninth-Grade On-Track Rate, Regular Attendance Rate, and Four-Year On-Time Graduation rate used by the Agency to measure the success of activities funded by the SIA.

“Disaggregated” has the meaning given in section 12(a) of the Act.

“Five-Year Completion Rate” has the meaning given in section 12(b) of the Act.

“Focal Student Groups” means students from racial or ethnic groups that have historically experienced academic disparities, students with disabilities, English language learners, economically disadvantaged, students who are homeless and students who are foster children.

“Four-Year on-Time Graduation Rate” means the percentage of students who received a high school diploma or a modified diploma within four years of the student beginning the ninth grade.

“Gap Closing Targets” or “Closing Gap Targets” means the reduction of academic disparities between groups of students especially for Focal Student Groups set forth in the Integrated Plan based on the February 2022 “Aligning for Student Success: Integrated Guidance for Six ODE Initiatives”.

“Integrated Guidance” means the integration of the following six programs: High School Success (HSS), Student Investment Account (SIA), Continuous Improvement Planning (CIP), Career and Technical Education-Perkins V (CTE), Every Day Matters (EDM), and Early Indicators Intervention Systems (EIS). Together operationally, the guidance creates opportunities to improve outcomes and learning conditions for students and educators. Working within existing state statutes and administrative rules, ODE developed a framework for success that meets the core purpose of each program while trying to create a stronger framework from which progress, long-term impact, and learning approach to monitoring and evaluation is a hallmark of high-performing educational systems.

“Integrated Plan” means the plan developed following the Integrated Guidance, which includes the SIA, which has a focus on increasing academic achievement by all students, reducing academic disparities for identified student groups, and meeting students’ mental and behavioral health needs in addition to other needs deemed important at each school, stated outcomes, strategies, and activities. The plan may only be adjusted with approval from ODE staff in order to align with the anticipated outcomes and approved by Agency.

“Local Optional Metrics” means additional Progress Markers toward the Common Metrics included in the Integrated Plan.

“Longitudinal Performance Growth Targets (LPGTs)” means the required common metrics and optional locally defined metrics, including targets related to student mental and behavioral health needs, included in Grantee’s Integrated Plan.

“Ninth-grade On-Track Rate” has the meaning given in section 12(d) of the Act.

“Progress Markers” means sets of indicators set forth in the Integrated Plan that identify the kinds of changes Agency expects to see in policies, practices and approaches over the next three years that lead to Grantee reaching its LPGTs.

“Regular Attendance Rate” has the meaning given in section 12(f) of the Act.

“SIA Account” means the Student Investment Account established, pursuant to ORS 327.175, within the Fund for Student Success for the purpose of distributing grants under ORS 327.195.

“Stretch Targets” means significant improvement set forth in the Integrated Plan by the district in either: (i) raising academic achievement or (ii) reducing academic disparities and closing gaps, as further described in the December 2019 “Guidance for Eligible Applicants”.

“Third-Grade Reading Proficiency Rate” has the meaning given in section 12(g) of the Act.

SECTION III – PROJECT ACTIVITIES

Integrated Plan Implementation

Agency will disburse Grant Funds for Allowable Costs of the Project that implement Grantee’s Integrated Plan during the Performance Period in accordance with formula and activities described in the Act.

At the start of the 2023-2024 School Year, Grantee must begin to implement its Integrated Plan.

Grantees must use the Grant Funds only for:

(a) Increasing instructional time, which may include: (A) More hours or days of instructional time; (B) Summer programs; (C) Before-school or after-school programs; or (D) Technological investments that minimize class time used for assessments administered to students.

(b) Addressing students’ health or safety needs, which may include: (A) Social-emotional learning and development; (B) Student mental and behavioral health; (C) Improvements to teaching and learning practices or organizational structures that lead to better interpersonal relationships at the school; (D) Student health and wellness; (E) Trauma-informed practices; (F) School health professionals and assistants; or (G) Facility improvements directly related to improving student health or safety.

(c) Reducing class sizes, which may include increasing the use of instructional assistants, by using evidence-based criteria to ensure appropriate student-teacher ratios or staff caseloads.

(d) Expanding availability of and student participation in well-rounded learning experiences, which may include: (A) Developmentally appropriate and culturally responsive early literacy practices and programs in prekindergarten through third grade; (B) Culturally responsive practices and programs in grades six through eight, including learning, counseling and student support that is connected to colleges and careers; (C) Broadened curricular options at all grade levels, including access to: (i) Art, music and physical education classes; (ii) Science, technology, engineering and mathematics education; (iii) Career and technical education, including career and technical student organization programs; (iv) Electives that are engaging to students; (v) Accelerated college credit programs, including dual credit programs, International Baccalaureate programs and advanced placement programs; (vi) Dropout prevention programs and transition supports; (vii) Life skills classes; or (viii) Talented and gifted programs; or (D) Access to licensed educators with a library media endorsement

Administrative costs shall not exceed 5% or \$500,000, whichever is less, of Grantee’s total expenditures. Administrative costs may include (A) Ongoing community engagement; (B) costs associated with the administration of the grant.

Grantee must make satisfactory progress on Grantee’s Progress Markers and LPGT described in Exhibit B.

Grantee must periodically review its progress toward meeting Grantee’s Progress Markers and LPGT described in Exhibit B.

Subsection 2. Charter School Relationships

For each charter school applying for SIA Funds with the Grantee, please indicate the type of relationship you have: Either Fully Administered or Partially Administered.

Indicate Fully Administered if the Charter will be fully embedded within the Grantee’s Integrated Plan and Budget

Indicate Partially Administered if the Grantee will provide broad fiscal and monitoring oversight, but the Charter will act largely independently.

Charter School(s)		
Milwaukie Academy of the Arts	<input checked="" type="checkbox"/> Fully Administered	<input type="checkbox"/> Partially Administered
Cascade Heights	<input type="checkbox"/> Fully Administered	<input checked="" type="checkbox"/> Partially Administered
Clackamas Middle College	<input type="checkbox"/> Fully Administered	<input checked="" type="checkbox"/> Partially Administered
	<input type="checkbox"/> Fully Administered	<input type="checkbox"/> Partially Administered
	<input type="checkbox"/> Fully Administered	<input type="checkbox"/> Partially Administered
	<input type="checkbox"/> Fully Administered	<input type="checkbox"/> Partially Administered

For Fully Administered Charters, all reporting must be done through the Grantee’s reporting dashboard.

For Partially Administered Charters, the Grantee shall ensure that the Charter maintains its own Integrated Plan and Budget and reports progress separately on the Charter’s reporting dashboard.

SECTION IV – REPORTING REQUIREMENTS

Grantee must submit quarterly financial and performance progress reports as well as a final yearly report on the dates set forth in Section V. This reporting requirement shall survive termination of this Agreement.

Financial Reports

Beginning in October of 2023 and continuing each quarter thereafter, Grantee must submit a financial report detailing its expenditure of Grant Funds to the Agency using the form provided by the Agency.

Reports are due 30 days after the end of each fiscal year quarter. The yearly report will be due no later than 60 days after the end of the performance period.

If Grantee does not use the Grant Funds for Allowable Project Costs Agency may exercise the remedies provided in Section 17 of this Grant, including without limitation deducting amounts from future disbursements of Grant Funds.

Any Grant Funds that are not used by Grantee by September 30 of each grant year, must be returned to Agency for deposit in the Student Investment Account.

Integrated Plan Performance Reporting

The Agency will closely monitor and evaluate Grantee's progress towards its Progress Markers.

Beginning in October of 2023 and continuing each quarter thereafter, Grantee must submit a narrative Performance Progress Report detailing its Integrated Plan activities to the Agency using the form provided by the Agency. Reports are due 30 days after the end of each fiscal year quarter. Reports include providing Progress Marker updates. The yearly report will be due no later than 60 days after the end of the performance period.

SIA Grant Monitoring

The Agency will monitor Grantee's performance under this Grant in person, video conferencing or by phone. Agency will provide written notice to Grantee, as provided in Section 19.4 of the Grant, at least 15 days in advance of Agency's monitoring activities and will schedule in person visits, video conferencing and phone calls.

A Grant monitoring visit or call may cover a variety of topics at Agency's discretion including but not limited to: Grantee's compliance with the SIA Account purposes; challenges faced by the Grantee in implementing its Plan; Integrated Plan outcomes; its budget and expenditure of moneys received from the SIA Account, Grantee's progress toward achieving its Progress Markers; financial reporting, any expenditure changes, and reconciliation of Grant Funds; or Grantee's training and technical assistance needs.

Before an on-site visit, the Agency will advise Grantee on how to prepare for the monitoring visit and financial reconciliation, the format for the visit, and which Grantee organizational leaders, staff or others should be involved in the visit. Once a date and time are confirmed, the Grantee should send a notification to its organizational leaders, staff, students and community partners who are expected to participate; identify a meeting location and prepare all necessary monitoring documents and data.

The department may establish a procedure for conducting performance audits on a random basis or based on just cause as allowed under rules adopted by the board.

Each grant recipient must conduct a performance review every four years as required by standards adopted in board rule.

SECTION V – DISBURSEMENT and REPORTING PROVISIONS

Agency will disburse the Grant Funds using its Electronic Grants Management System (“EGMS”), on a quarterly basis as outlined below:

Disbursement Date	Quarterly Amount
July 1	25% of funds allocated
October 1	25% of funds allocated
January 1	25% of funds allocated
April 1	25% of funds allocated

If this Grant is not fully executed by July 1, annually, the Agency will disburse the Grant Funds within 30 days of the Execution Date.

Agency will disburse the Grant Funds in quarterly disbursements in advance of expenditures, not on a reimbursement basis. While we encourage grantees to draw funds down following the schedule noted above, 100% of funds must be drawn down by June 30th, each year.

Grantee must submit its financial and performance progress reports by the following dates:

October 31

January 31

April 30

November 30 (Annual Report)

Grantee shall provide to Agency the minutes from the board meeting demonstrating that Grantee’s Financial Audit was presented at an open meeting with the opportunity for public comment (not a consent agenda item). These board minutes must be submitted alongside the Second Quarterly Report.

Grantee shall provide to Agency the minutes from the board meeting demonstrating that Grantee’s Annual Report was presented at an open meeting with the opportunity for public comment (not a consent agenda item). These board minutes must be submitted alongside the Annual Report.

Grantee must post its Annual Report to Grantee’s webpage.

EXHIBIT B

COMMON AND CUSTOMIZED PERFORMANCE FRAMEWORK

NORTH CLACKAMAS SD 12

SECTION I – PROGRESS MARKERS FOR 2023-2025 BIENNIUM

The Progress Markers are a mechanism to support a developmental approach to evaluation with a focus on learning about the kinds of changes that happen from distinct investments. Grantees will provide updates toward these Progress Markers through the quarterly/annual reports. The following fifteen Progress Markers are arranged into three categories that represent the advancement in degree of change from minimum to profound as described and listed below:

- A. **“Start to See: Early Signs of Progress”** Based on your investments and activities, what changes or contributions are you noticing? What practices are improving?
- B. **“Gaining Traction: Intermediate Changes”** Based on your investments and activities, are you seeing any of these impacts?
- C. **“Profound Progress: Substantial and Significant Changes”** Based on your investments and activities, are any of these more transformational changes noticeable?

A. Start to See: Early Signs of Progress

1	Community engagement is authentic, consistent, and ongoing. The strengths that educators, students, families, focal groups, and tribal communities bring to the educational experience informs school and district practices and planning.
2	Equity tools are utilized in continuous improvement cycles, including the ongoing use of an equity lens or decision-tool that impacts policies, procedures, people/students, resource allocation, and practices that may impact grading, discipline, and attendance.
3	Data teams are formed and provided time to meet regularly to review disaggregated student data in multiple categories (grade bands, content areas, attendance, discipline, mental health, participation in advanced coursework, formative assessment data, etc.). These teams have open access to timely student data and as a result decisions are made that positively impact district/school-wide systems and focal populations.
4	Schools and districts have an accurate inventory of literacy assessments, tools, and curriculum being used, including digital resources, to support literacy (reading, writing, listening, and speaking). The inventory includes a review of what resources and professional development are research-aligned, formative, diagnostic, and culturally responsive.

B. Gaining Traction: Intermediate Changes

5	Two-way communication practices are in place, with attention to mobile students and primary family languages. Families understand approaches to engagement and attendance, literacy strategy, math vision, what “9th grade on-track” means, graduation requirements, access to advanced/college-level courses and CTE experiences, and approaches to supporting student well-being and well-rounded education.
6	Student agency and voice is elevated. Educators use student-centered approaches and instructional practices that shift processes and policies that actualize student and family ideas and priorities.
7	Action research, professional learning, data teams, and strengths-based intervention systems are supported by school leaders and are working in concert to identify policies, practices, or procedures informed by staff feedback to meet student needs, including addressing systemic barriers, the root-causes of chronic absenteeism, academic disparity, and student well-being. These changes and supports are monitored and adjusted as needed.
8	Comprehensive, evidence-informed, culturally responsive literacy plans, including professional development for educators, are documented and communicated to staff, students (developmentally appropriate), and families. Literacy plans and instruction are evaluated and adjusted to deepen students’ learning. Digital resources are being used with fidelity to advance learners’ engagement with instruction.
9	A review of 9th grade course scheduling, as it relates to on-track status for focal student groups, accounts for core and support core class placement . School staff ensure emerging bilingual students are enrolled in appropriate credit-bearing courses that meet graduation requirements.
10	Foundational learning practices that create a culturally sustaining and welcoming climate are visible. This includes practices that ensure safe, brave, and welcoming classrooms, schools and co/extracurricular environments. Strengths-based, equity-centered, trauma and SEL-informed practices are present and noticeable. Policies and practices prioritize health, well-being, care, connection, engagement, and relationship building. Multiple ways of being are supported through culturally affirming and sustaining practices for students, staff, and administrators.

C. Profound Progress: Substantial and Significant Changes

11	Schools strengthen partnerships with active community organizations and partners, including local public health, mental health, colleges, workforce development boards, employers, labor partners, faith communities, Tribal nations, and other education partners in order to collaboratively support students’ growth and well-being. Characteristics of strong partnerships include mutual trust and respect, strengths-based and collaborative approaches, clear communication around roles, and shared responsibilities and decision-making power.
12	Financial stewardship reflects high-quality spending with accurate and transparent use of state and federal funds in relationship to a comprehensive needs assessment, disaggregated data, and the priorities expressed by students, families, communities, business, and Tribal partners in resource allocation and review.
13	Students and educators experience a well-rounded and balanced use of assessment systems that help them identify student learning in the areas of the Oregon State Standards. Educators understand how to assess emerging multilingual students’ assets to inform gauging progress.
14	Policies, practices, and learning communities address systemic barriers. Schools and districts have a process to identify, analyze, and address barriers that disconnect students from their educational goals, impact student engagement or attendance, and/or impede students from graduating on-time or transitioning to

	their next steps after high school. Staff members are consistently engaging in action research, guided by student’s strengths and interests, to improve their practice and advance professional learning.
15	Schools create places and learning conditions where every student, family, educator and staff member is welcomed, where their culture and assets are valued and supported, and where their voices are integral to decision making. Instruction is monitored and adjusted to advance and deepen individual learners’ knowledge and understanding of the curriculum. Educators are empowered with agency and creativity. Communities are alive with visions, stories, and systems of vitality, wholeness, and sustainability.

SECTION II – FINALIZED CO-DEVELOPED LPGTS

The Longitudinal Performance Growth Targets (LPGTs) include baseline, stretch, and gap-closing targets for each of the common metrics. These targets center focal student groups while supporting public transparency and learning. Progress toward meeting these Longitudinal Performance Growth Targets will be included in the Annual Report. While all three types of targets are named in the Grant Agreement, ODE will review and consider when or if intervention is needed using only the Baseline and Gap-Closing Targets

Target Type	2023-24	2024-25	2025-26	2026-27	2027-28
Four Year Cohort Graduation					
Baseline Target: All Students	88.60%	90.70%	92.80%	94.90%	>95.00%
Stretch Target: All Students	89.70%	92.80%	>95.00%	>95.00%	>95.00%
Gap-Closing Target: All Focal Group Students	85.80%	90.00%	94.20%	>95.00%	>95.00%
Five Year Cohort Completion					
Baseline Target: All Students	93.70%	>95.00%	>95.00%	>95.00%	>95.00%
Stretch Target: All Students	93.00%	94.30%	>95.00%	>95.00%	>95.00%
Gap-Closing Target: All Focal Group Students	91.70%	94.30%	>95.00%	>95.00%	>95.00%

9th Grade on-Track					
Baseline Target: All Students	92.60%	>95.00%	>95.00%	>95.00%	>95.00%
Stretch Target: All Students	94.00%	>95.00%	>95.00%	>95.00%	>95.00%
Gap-Closing Target: All Focal Group Students	90.30%	>95.00%	>95.00%	>95.00%	>95.00%
3rd Grade ELA Proficiency					
Baseline Target: All Students	44.50%	46.20%	47.90%	49.60%	51.30%
Stretch Target: All Students	45.40%	47.90%	50.50%	53.00%	55.60%
Gap-Closing Target: All Focal Group Students	33.70%	37.10%	40.50%	43.90%	47.30%
Regular Attenders					
Baseline Target: All Students	70.10%	70.70%	71.30%	71.90%	72.50%
Stretch Target: All Students	70.40%	71.30%	72.20%	73.10%	74.00%
Gap-Closing Target: All Focal Group Students	51.70%	52.90%	54.10%	55.30%	56.50%

SECTION III – APPROVED LOCAL OPTIONAL METRICS (IF APPLICABLE)

Local optional metrics are designed to allow grantees to set and monitor metrics connected to outcomes they’ve described in their Integrated Plan.

	2023-24	2024-25	2025-26	2026-27	2027-28
Local Optional Metrics					
Baseline Target: All Students					
Stretch Target: All Students					
Gap-Closing Target: All Focal Group Students					

EXHIBIT C INSURANCE

INSURANCE REQUIREMENTS

Grantee/Recipient shall obtain at Grantee/Recipient's expense the insurance specified in this Exhibit C prior to performing under this Contract. Grantee/Recipient shall maintain such insurance in full force and at its own expense throughout the duration of this Contract, as required by any extended reporting period or continuous claims made coverage requirements, and all warranty periods that apply. Grantee/Recipient shall obtain the following insurance from insurance companies or entities that are authorized to transact the business of insurance and issue coverage in the State of Oregon and that are acceptable to Agency. All coverage shall be primary and non-contributory with any other insurance and self-insurance, with the exception of Professional Liability and Workers' Compensation. Grantee/Recipient shall pay for all deductibles, self-insured retention, and self-insurance, if any.

If Grantee/Recipient maintains broader coverage and/or higher limits than the minimums shown in this insurance requirement exhibit, Agency requires and shall be entitled to the broader coverage and/or higher limits maintained by Grantee/Recipient.

WORKERS' COMPENSATION & EMPLOYERS' LIABILITY

All employers, including Grantee/Recipient, that employ subject workers, as defined in ORS 656.027, shall comply with ORS 656.017, and provide workers' compensation insurance coverage for those workers, unless they meet the requirement for an exemption under ORS 656.126(2). Grantee/Recipient shall require and ensure that each of its subcontractors complies with these requirements. If Grantee/Recipient is a subject employer, as defined in ORS 656.023, Grantee/Recipient shall also obtain employers' liability insurance coverage with limits not less than \$500,000 each accident.

If Grantee/Recipient is an employer subject to any other state's workers' compensation law, Contactor shall provide workers' compensation insurance coverage for its employees as required by applicable workers' compensation laws including employers' liability insurance coverage with limits not less than \$500,000 and shall require and ensure that each of its out-of-state subcontractors complies with these requirements.

As applicable, Grantee/Recipient/Recipient shall obtain coverage to discharge all responsibilities and liabilities that arise out of or relate to the Jones Act with limits of no less than \$5,000,000 and/or the Longshoremen's and Harbor Workers' Compensation Act.

COMMERCIAL GENERAL LIABILITY

Grantee/Recipient shall provide Commercial General Liability Insurance covering bodily injury and property damage in a form and with coverage that are satisfactory to the State. This insurance must include personal and advertising injury liability, products and completed operations, contractual liability coverage for the indemnity provided under this contract, and have no limitation of coverage to designated premises, project, or operation. Coverage must be written on an occurrence basis in an amount of not less than \$1,000,000 per occurrence and not less than \$2,000,000 annual aggregate limit.

AUTOMOBILE LIABILITY INSURANCE

Required **Not required**

Grantee/Recipient shall provide Automobile Liability Insurance covering Grantee/Recipient's business use including coverage for all owned, non-owned, or hired vehicles with a combined single limit of not less than \$1,000,000 for bodily injury and property damage. This coverage may be written in combination with the Commercial General Liability Insurance (with separate limits for Commercial General Liability and

Automobile Liability). Use of personal automobile liability insurance coverage may be acceptable if evidence that the policy includes a business use endorsement is provided.

PROFESSIONAL LIABILITY

Required **Not required**

Grantee/Recipient shall provide Professional Liability covering any damages caused by an error, omission or any negligent acts related to the services to be provided under this Contract by the Grantee/Recipient and Grantee/Recipient’s subcontractors, agents, officers or employees in an amount not less than \$1,000,000 per claim and not less than \$2,000,000 annual aggregate limit.

If coverage is provided on a claims made basis, then either an extended reporting period of not less than 24 months shall be included in the Professional Liability insurance coverage, or the Grantee/Recipient shall provide Continuous Claims Made coverage as stated below.

EXCESS/UMBRELLA INSURANCE

A combination of primary and excess/umbrella insurance may be used to meet the required limits of insurance. When used, all of the primary and umbrella or excess policies shall provide all of the insurance coverages herein required, including, but not limited to, primary and non-contributory, additional insured, Self-Insured Retentions (SIRs), indemnity, and defense requirements. The umbrella or excess policies shall be provided on a true “following form” or broader coverage basis, with coverage at least as broad as provided on the underlying insurance. No insurance policies maintained by the Additional Insureds, whether primary or excess, and which also apply to a loss covered hereunder, shall be called upon to contribute to a loss until the Contractor’s primary and excess liability policies are exhausted.

If excess/umbrella insurance is used to meet the minimum insurance requirement, the Certificate of Insurance must include a list of all policies that fall under the excess/umbrella insurance.

ADDITIONAL INSURED

All liability insurance, except for Workers’ Compensation, Professional Liability, Pollution Liability and Network Security and Privacy Liability (if applicable), required under this Contract must include an additional insured endorsement specifying the State of Oregon, its officers, employees, and agents as Additional Insureds, but only with respect to Grantee/Recipient’s activities to be performed under this contract. Coverage shall be primary and non-contributory with any other activities to be performed under this Grant.

Regarding Additional Insured status under the General Liability policy, we require additional insured status with respect to liability arising out of ongoing operations and completed operations, but only with respect to Grantee/Recipient’s activities to be performed under this Contract. The Additional Insured endorsement with respect to liability arising out of your ongoing operations must be on or at least as broad as ISO Form CG 20 10 and the Additional Insured endorsement with respect to completed operations must be on or at least as broad as ISO form CG 20 37.

WAIVER OF SUBROGATION

Grantee waives, and must require its first tier contractors and subgrantees waive, rights of subrogation which Grantee, Grantee’s first tier contractors and subgrantees, if any, or any insurer of Grantee may acquire against the Agency or State of Oregon by virtue of the payment of any loss. Grantee must obtain, and require its first tier contractors and subgrantees to obtain, any endorsement that may be necessary to affect this waiver of subrogation, but this provision applies regardless of whether or not the Agency has received a waiver of subrogation endorsement from the Grantee or the Grantee’s insurer(s).

CONTINUOUS CLAIMS MADE COVERAGE

If any of the required liability insurance is on a claims made basis and does not include an extended reporting period of at least 24 months, then Grantee/Recipient shall maintain continuous claims made liability coverage, provided the effective date of the continuous claims made coverage is on or before the effective date of the Grant Agreement, for a minimum of 24 months following the later of:

1. Grantee/Recipient’s completion and Agency’s acceptance of all Services required under the Contract, or
2. Agency or Grantee/Recipient termination of this Contract, or
3. The expiration of all warranty periods provided under this Contract.

CERTIFICATE(S) AND PROOF OF INSURANCE

Grantee/Recipient shall provide to Agency Certificate(s) of Insurance for all required insurance before delivering any Goods and performing any Services required under this Contract. The Certificate(s) shall list the State of Oregon, its officers, employees and agents as a Certificate holder and as an endorsed Additional Insured. The Certificate(s) shall also include all required endorsements or copies of the applicable policy language effecting coverage required by this Contract. If excess/umbrella insurance is used to meet the minimum insurance requirement, the Certificate of Insurance must include a list of all policies that fall under the excess/umbrella insurance. As proof of insurance Agency has the right to request copies of insurance policies and endorsements relating to the insurance requirements in this Contract.

NOTICE OF CHANGE OR CANCELLATION

The Grantee/Recipient or its insurer must provide at least 30 days’ written notice to Agency before cancellation of, material change to, potential exhaustion of aggregate limits of, or non-renewal of the required insurance coverage(s).

INSURANCE REQUIREMENT REVIEW

Grantee/Recipient agrees to periodic review of insurance requirements by Agency under this Contract and to provide updated requirements as mutually agreed upon by Grantee/Recipient and Agency.

STATE ACCEPTANCE

All insurance providers are subject to Agency acceptance. If requested by Agency, Grantee/Recipient shall provide complete copies of insurance policies, endorsements, self-insurance documents and related insurance documents to Agency’s representatives responsible for verification of the insurance coverages required under this Exhibit C.

Additional Coverages That May Apply:

DIRECTORS, OFFICERS AND ORGANIZATION LIABILITY:

Required **Not required**

Grantee/Recipient shall provide **Directors, Officers and Organization** insurance covering the Grantee/Recipient’s Organization, Directors, Officers, and Trustees actual or alleged errors, omissions, negligent, or wrongful acts, including improper governance, employment practices and financial oversight - including improper oversight and/or use of use of grant funds and donor contributions which includes state or federal funds - with a combined single limit of not less than \$1,000,000 per claim.

PHYSICAL ABUSE AND MOLESTATION INSURANCE COVERAGE:

Required **Not required**

Grantee/Recipient shall provide Abuse and Molestation Insurance in a form and with coverage that are satisfactory to the State covering damages arising out of actual, perceived, or threatened physical abuse, mental injury, sexual molestation, negligent: hiring, employment, supervision, training, investigation, reporting to proper authorities, and retention of any person for whom the Grantee/Recipient is responsible including but not limited to Grantee/Recipient and Grantee/Recipient's employees and volunteers. Policy endorsement's definition of an insured shall include the Grantee/Recipient, and the Grantee/Recipient's employees and volunteers. Coverage shall be written on an occurrence basis in an amount of not less than \$1,000,000 per occurrence and not less than \$3,000,000 annual aggregate. Coverage can be provided by a separate policy or as an endorsement to the commercial general liability or professional liability policies. The limits shall be exclusive to this required coverage. Incidents related to or arising out of physical abuse, mental injury, or sexual molestation, whether committed by one or more individuals, and irrespective of the number of incidents or injuries or the time period or area over which the incidents or injuries occur, shall be treated as a separate occurrence for each victim. Coverage shall include the cost of defense and the cost of defense shall be provided outside the coverage limit.



Student Investment Account

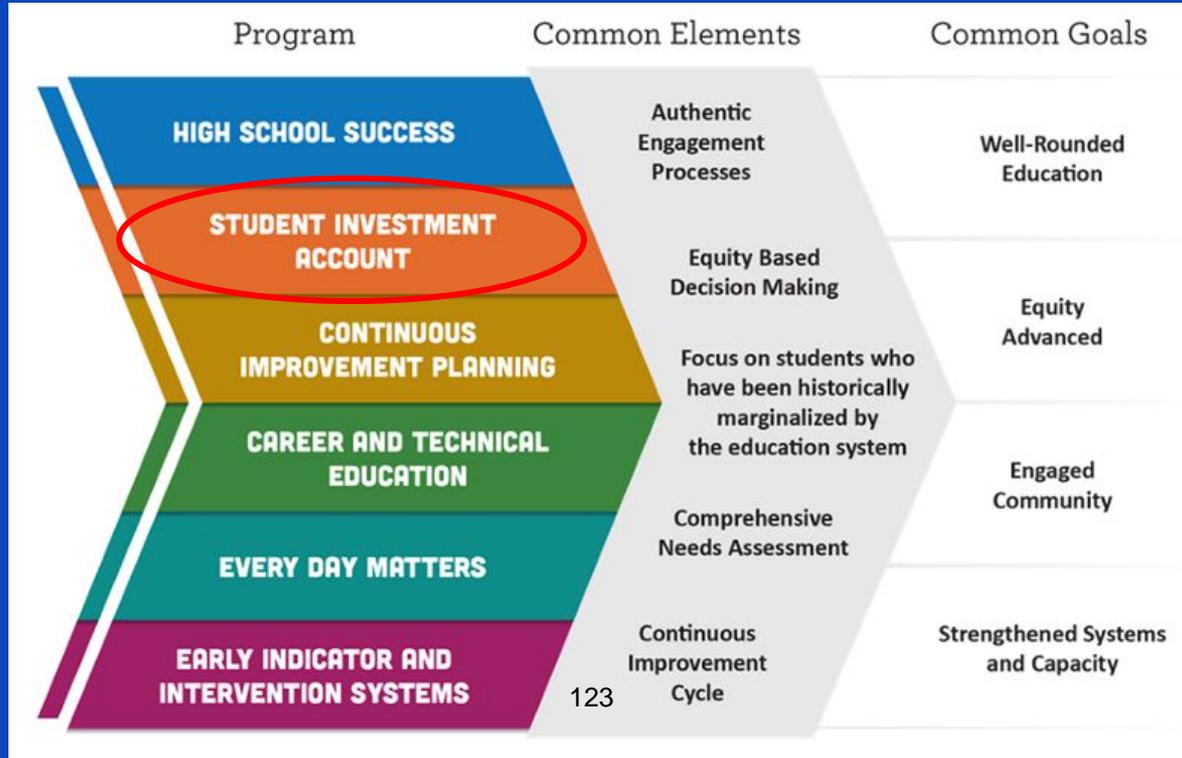
**2023-2024 Grant Agreement and
Longitudinal Performance Growth Targets**

Purpose

- To share information about Longitudinal Performance Growth Targets (LPGTs) as related to the Student Investment Account.
- To seek board approval for the Student Investment Grant Agreement with embedded Longitudinal Performance Growth Targets.



Six Programs & Common Goals



Context for LPGTs

- The final stage of our application process
- Statutorily required under the Student Investment Account
- Embedded in our Grant Agreement
- Reported on annually
- Performance review required every four years

124



LPGTs Must Be: Realistic & Attainable

Districts working with ODE considered:

- Historic trends for each metric
- An evaluation of the likely impact of new or expanded programs on that metric
- Statewide averages and trends for LPGTs

125



LPGTs Required Metrics

- Four-year Graduation:** The percentage of students earning a regular or modified diploma within four years of entering high school.
- Five-year Completion:** The percentage of students earning a regular, modified, extended or adult high school diploma, or a GED within five years of entering high school.
- Third Grade Reading:** The percentage of students proficient on statewide English Language Arts (ELA) assessments in 3rd grade.
- Ninth Grade On-Track:** The percentage of students earning at least one-quarter of their graduation credits by the end of the summer following their 9th grade year.
- Regular Attenders:** The percentage of students attending more than 90 percent of their enrolled school days.

126



LPGTs 5 Year Targets

- Baseline – the minimum level of realistic growth
- Stretch – more ambitious, still realistic
- Gap Closing – reduction of academic disparities for focal student groups

127



CoDeveloped Targets

Four Year Graduation

Target Type	2023-24	2024-25	2025-26	2026-27	2027-28
Four Year Cohort Graduation					
Baseline Target: All Students	88.60%	90.70%	92.80%	94.90%	>95.00%
Stretch Target: All Students	89.70%	92.80%	>95.00%	>95.00%	>95.00%
Gap-Closing Target: All Focal Group Students	85.80%	90.00%	94.20%	>95.00%	>95.00%

CoDeveloped Targets

Five Year Cohort Completion

Target Type	2023-24	2024-25	2025-26	2026-27	2027-28
Five Year Cohort Completion					
Baseline Target: All Students	93.70%	>95.00%	>95.00%	>95.00%	>95.00%
Stretch Target: All Students	93.00%	94.30%	>95.00%	>95.00%	>95.00%
Gap-Closing Target: All Focal Group Students	91.70%	94.30%	>95.00%	>95.00%	>95.00%

CoDeveloped Targets

9th Grade On-Track

Target Type	2023-24	2024-25	2025-26	2026-27	2027-28
9th Grade on-Track					
Baseline Target: All Students	92.60%	>95.00%	>95.00%	>95.00%	>95.00%
Stretch Target: All Students	94.00%	>95.00%	>95.00%	>95.00%	>95.00%
Gap-Closing Target: All Focal Group Students	90.30%	>95.00%	>95.00%	>95.00%	>95.00%

CoDeveloped Targets

3rd Grade ELA Proficiency

Target Type	2023-24	2024-25	2025-26	2026-27	2027-28
3rd Grade ELA Proficiency					
Baseline Target: All Students	44.50%	46.20%	47.90%	49.60%	51.30%
Stretch Target: All Students	45.40%	47.90%	50.50%	53.00%	55.60%
Gap-Closing Target: All Focal Group Students	33.70%	37.10%	40.50%	43.90%	47.30%

CoDeveloped Targets

Regular Attenders

Target Type	2023-24	2024-25	2025-26	2026-27	2027-28
Regular Attenders					
Baseline Target: All Students	70.10%	70.70%	71.30%	71.90%	72.50%
Stretch Target: All Students	70.40%	71.30%	72.20%	73.10%	74.00%
Gap-Closing Target: All Focal Group Students	51.70%	52.90%	54.10%	55.30%	56.50%

Questions?

133



SUPERINTENDENT EVALUATION PROCESS

DISCUSSION/ACTION

Agenda Item #9
December 7, 2023

ORIGINATED BY:

The need to develop and adopt an evaluation process for the superintendent's evaluation.

BUDGET IMPACT/SOURCE OF FUNDS:

Not applicable.

BACKGROUND:

The School Board adopts an evaluation process for the superintendent annually. In recent years, this evaluation process has been adopted by the School Board in December with the actual evaluation being completed prior to March 1.

ATTACHMENTS:

- A. Proposed 2023-2024 Superintendent Evaluation Timeline and Process
- B. Sections 7 & 8 of the 2022-2025 superintendent's contract relating to evaluation
- C. Policy [CBA Qualifications and Duties of the Superintendent](#)
- D. Policy [CBG Evaluation of the Superintendent](#)

CONTACT:

Jena Benologa, Board Chair



SUPERINTENDENT EVALUATION TIMELINE AND PROCESS

MONTH	ACTION	FORMAT	LEAD
October	Pre-check in and evaluation tools, policies, process, and timeline overview	Governance meeting	Board Chair(s) /Superintendent
	Superintendent shares suggested focal goals and standards	Written report	Superintendent
November	*Evaluation committee meeting	Committee meeting	Board Chair(s)
	Evaluation standards and descriptors template to Board	Written template	Board Secretary
	Board approves evaluation process and timeline	Board meeting	Board Chair(s)
	Pre-Check in evaluation meeting	Exec. session	Board Chair(s) /Superintendent
December	Superintendent finalizes goals and standards priorities for board and committee feedback	Written report	
	*Evaluation committee meeting	Committee meeting	Board Chair(s)
	Pre-Check In Evaluation Meeting	Conference	Board Chair(s) /Superintendent
January	Superintendent presents annual artifacts and/or reports	Written report Board meeting	Superintendent
	The board starts individual evaluation feedback	Individually	Board Directors
	*Evaluation committee meeting	Committee meeting	Board Chair(s)
February	The board finalizes individual evaluation feedback	Individually	Board Directors
	*Evaluation committee finalizes draft evaluation	Committee meeting	Board Chair(s)
	Board finalizes evaluation	Exec. session	Board Chair(s)
March	Evaluation shared with Superintendent by March 1, 2024		
	Evaluation discussion between Board and Superintendent	Exec. session	
	*Evaluation committee crafts a short narrative statement regarding the evaluation	Written	Board Chair(s)
	Board publicly shares and adopts short narrative statements regarding the evaluation	Board Meeting	Board Chair(s)
April-Aug	Establish Strategic Plan focus, prioritization, board goals, and direction for the next school year evaluation planning		Board Chair(s) /Superintendent

*Evaluation committee for 2023-2024: Vice Chair Kathy Wai and Director Glenn Wachter (Alternate: Director Mitzi Bauer)
 Timeline is approximate.

**ARTICLE 7
EVALUATION**

7.1 Purpose of Evaluation. The Board will evaluate the Superintendent's performance for the purposes of improving District leadership, maintaining open and effective communication between the Board and the Superintendent and enhancing relations between the Board and the Superintendent. The evaluations shall be made in reference to the Superintendent's position description as more fully set forth in District Policy CBA and those goals and objectives established by the Board in consultation with the Superintendent.

7.2 Procedure for Evaluations. The Board shall meet in Executive Session to evaluate and assess in writing the performance of the Superintendent in accordance with the schedule set forth below. The Superintendent shall be entitled to meet with the Board to review the evaluation before it is completed and to provide any information that the Superintendent deems pertinent.

7.3 Schedule for Evaluations. It is intended that the schedule for formal annual evaluation of the Superintendent will be congruent with District Policy CBG, which specifies the date by which the Board will decide upon renewal or extension of the Superintendent's contract and, thereafter, inform the Superintendent of that decision. The first formal evaluation under this agreement shall be completed by the first School Board meeting in March 2022, and, thereafter, annually.

**ARTICLE 8
PERFORMANCE GOALS**

The Board shall, in consultation with the Superintendent, establish general goals and specific objectives for the school year. The goals and objectives shall be established in writing and be among the criteria for evaluation of the Superintendent.



Code: **CBA**
Adopted: 6/19/86
Revised/Readopted: 6/23/11; 5/02/13
Orig. Code(s): CBA

Qualifications and Duties of the Superintendent

Qualifications and Reporting

The superintendent will hold a superintendent's credential as prescribed by the Teacher Standards and Practices Commission.

The superintendent is directly responsible to the Board.

Duties of the Superintendent

The superintendent:

1. Serves as chief executive officer of the Board except as otherwise provided by law, makes rules not in conflict with law or with Board policies and decides all matters of administrative and supervisory detail in connection with the operation and maintenance of the schools;
2. Initiates and directs the development of policies for approval by the Board, delegating such responsibility to associates and subordinates as deemed desirable;
3. Attends all meetings of the Board except those concerned with his/her own contract status and takes part in the deliberations, but does not vote;
4. Assists the Board in reaching sound judgments, establishing policies and approving those matters which the law requires the Board to approve;
5. Places before the Board necessary and helpful facts, comparisons, investigations, information and reports; and makes available the personal advice on special or technical matters by qualified persons;
6. Implements and interprets Board policies;
7. Recommends the appointment, contract renewal, contract extension, contract nonrenewal, contract nonextension or discharge of licensed employees to the Board as provided by law, Board policies and the employee's collective bargaining agreement, as applicable, and with such recommendations reported to the Board for approval;
8. Assigns or transfers licensed employees as provided by state law, Board policies, collective bargaining agreements and consultation agreements, as applicable;
9. Appoints, assigns, transfers, promotes, demotes or discharges classified and nonrepresented employees as provided by state law, Board policies, collective bargaining agreements and meet and confer agreements, as applicable;

10. Supervises and evaluates the work of the administrators who carry out the operation of the district under the authority and responsibility delegated to them by the superintendent;
11. Directs the work of the professional staff in evaluating curriculum and instructional materials and, upon the basis of such study, makes recommendations to the Board;
12. Supervises the establishment or modification of attendance and transportation area boundaries subject to Board approval;
13. Directs the preparation of the budget showing the estimated receipts and disbursements necessary to cover the needs of the district for the ensuing budget period and submits this estimate to the Board in accordance with law;
14. Approves and directs, in accordance with law and Board policy, purchases and expenditures, within the limits of the budget;
15. Exercises leadership in directing studies of sites and buildings, considering the population trend and the educational and cultural needs of the district, to ensure timely decisions by the Board and electorate regarding construction and renovation projects;
16. Represents the district in dealings with other school systems, social institutions, business firms, government agencies and the general public;
17. Keeps the public informed about current educational practices, educational trends and issues confronting the district.

The specific enumeration of the superintendent's duties as detailed above will not act to limit the broad authority and responsibility of the office.

END OF POLICY

Legal Reference(s):

[ORS 327.133](#)
[ORS 332.075](#)
[ORS 332.515](#)
[ORS 342.125](#)
[ORS 342.140](#)
[ORS 342.143](#)
[ORS 342.173](#)

[ORS 342.175](#)
[ORS 342.200](#)

[OAR 581-022-0102 to -1940](#)
[OAR 581-023-0006 to -0050](#)
[OAR 584-020-0000 to -0045](#)

[OAR 584-036-0035\(1\)](#)
[OAR 584-046-0005 to -0024](#)
[OAR 584-048-0085 to -0095](#)
[OAR 584-080-0151](#)
[OAR 584-080-0152](#)
[OAR 584-080-0161](#)

Cross Reference(s):

CBG - Evaluation of the Superintendent



Code: **CBG**
Adopted: 6/19/86
Revised/Readopted: 3/17/11; 6/22/17
Orig. Code(s): CBG

Evaluation of the Superintendent

The superintendent's job performance will be evaluated annually based on applicable standards of performance, Board policy and progress in attaining any goals for the year established by the superintendent and the Board.

Additional criteria for the evaluation, if any, will be developed at a public Board meeting prior to conducting the evaluation, and the superintendent will be notified of the additional criteria prior to the evaluation.

The Board's discussion and conferences with and about the superintendent and his/her performance will be in executive session, unless the superintendent requests an open session; however, such an executive session will not include directives about or a general evaluation of any district goal, objective or operation. Results of the evaluation will be written and placed in the superintendent's personnel file.

At the Board's discretion, it may notify the superintendent in writing of specific areas to be remedied, and the superintendent may be given an opportunity to correct the problem(s). Where the Board provided written notice pursuant to the prior sentence, if the Board determines the superintendent's performance remains unsatisfactory, the Board may dismiss or non-renew the superintendent pursuant to Board policy, the superintendent's employment contract, state law, and state administrative rules. In those situations where the superintendent's employment contract includes an evaluation, dismissal or non-renewal provision, it shall take precedent over this policy.

END OF POLICY

Legal Reference(s):

[ORS 192.660\(2\), \(8\)](#)
[ORS 332.107](#)
[ORS 332.505](#)

[ORS 342.513](#)
[ORS 342.815](#)

[OAR 581-022-1720](#)

Hanson v. Culver Sch. Dist. (FDAB 1975).

Cross Reference(s):

BDC - Executive Sessions
CB - Board-Superintendent Relationship
CBA - Qualifications and Duties of the Superintendent

MATH PATHWAYS

REPORT
Agenda Item #10
December 7, 2023

SUPERINTENDENT’S RECOMMENDATION:

This item is for Board information only.

K-12 MATH PROGRAMMING

In response to Oregon’s adoption of the 2021 mathematical standards, research from educational experts, and concerns about student persistence, access and success in advanced mathematics, NCSD restructured course pathways beginning in 2020-2021 with 6th grade students. While NCSD’s response was ahead of many other school districts, changes locally and nationally have continued and include significant changes at the university level in regard to admission criteria.

In the spring of 2024, NCSD will identify K-12 curricular materials to align with the 2021 state standards and current college and career readiness standards of success. Paired with instructional guidance and professional development, these materials support a deepening of conceptual understanding, complex reasoning and mathematical modeling.

Included in this packet are the resources referenced in this presentation as well as links to additional research and resources.

ATTACHMENTS:

- [Closing the Opportunity Gap: A Call for Detracking Mathematics. A Position Statement from the National Council of Supervisors of Mathematics](#)
- [High School Math Pathways Project Communication Toolkit \(Oregon Math Project, 2023\)](#)
- [NCSD parent resource page, 6-8 mathematics](#)
- [Additional research addressing course restructuring](#)
- [Math Pathways Board Presentation](#)

PRESENTER / STAFF CONTACT:

Tammy O’Neill, Executive Director of Teaching, Learning and Professional Development
Dianna Ngai, Associate Director of Teaching, Learning and Professional Development
Luke Weinbrecht, Mathematics Instructional Coach

Closing the Opportunity Gap: A Call for Detracking Mathematics

*A position statement from NCSM:
Leadership in Mathematics Education*

Our Position

NCSM, Leadership in Mathematics Education, believes that all students should have access to high-quality instruction and post-secondary educational opportunities. While we acknowledge that many factors hinder such student access, in this position statement we call for the cessation of one clear, addressable factor: the practice of tracking. As a practice, tracking too often leads to segregation, dead-end pathways, and low quality experiences, and disproportionately has a negative impact on minority and low-socioeconomic students. Additionally, placement into tracks too often lacks transparency and accountability. Overall, tracking does not improve achievement but it does increase educational inequality. In light of this, NCSM calls instead for detracked, heterogeneous mathematics instruction through early high school, after which students may be well-served by separate curricular pathways that all lead to viable, post-secondary options.

Tracking: Policies and Practices Widening the Opportunity Gap

“Tracking is the practice of dividing students into separate classes for high-, average-, and low-achievers.”¹ In practice, these might be considered low or high tracks, or some other, similar categorization, and students might be placed into these tracks based on questionable methods using grades and placement exams, perceived ability through teacher recommendation, or non-academic expectations adults have for the students. Much of the research on tracking policies demonstrates the negative effects on certain subgroups of students by denying them access to rigorous coursework.²

More generally, a number of studies point to the influence course-taking patterns have on academic outcomes.³ This influence is true for student subgroups like emergent bilingual students⁴ and students from low income backgrounds, different racial and ethnic groups, and different genders.⁵ It may disable students from pursuing whatever course of study interests them when they get to high school, college, career or beyond. Tracking becomes worse for students year-over-year, as each consecutive year in a track makes it more difficult to move out of that track.

¹ Oakes, 2005

² Lee & Bryk, 1988; Gamoran, et al, 1997; Cogan, et al. 2001

³ Lee, et al, 1997; Gamoran, 1997; Wang & Goldschmidt, 2003; Riegle-Crumb, 2006; Riegle-Crumb & Grodsky, 2010; Gottfried et al., 2014

⁴ Umansky, 2016; Thompson, 2017

⁵ Oakes et al., 1990; Riegle-Crumb, 2006; Long, et al., 2012; Palarady, et al., 2015

Tracking is a form of de facto segregation as students in higher tracks have historically been predominantly White or Asian American from affluent families, whereas students in lower tracks have been primarily students of color and students who are economically disadvantaged. Research studies show that minority students are often denied access to high level mathematics through discriminatory [whether intentional or not] tracking and course placement.⁶ Additionally, students in lower tracks usually “experience instruction that focuses on memorization and rote procedures.”⁷

It is important to separate this position statement from the current pathways (or branching) conversations currently focused on re-thinking mathematics in the later years of high school. Examples of these include the Charles A. Dana Center’s Launch Years Initiative at the University of Texas at Austin; NCTM’s Catalyzing Change; Just Equation’s Branching Out; and the Math Pathways report by the Center for American Progress. Such pathways are about equally rigorous mathematical experiences that are relevant to students’ desired post-secondary experiences and also provide students opportunity to move between each pathway of courses when appropriate. NCSM supports work in this direction.

Because tracking often begins as ability grouping in the elementary school, there is a need to address tracking as well as the appropriate use of early acceleration in the elementary school. However, the focus of this first position statement in a series focused on closing the opportunity gap is on detracking mathematics in middle and high school.

Policies and Practices Reducing the Opportunity Gap: Detracking

Detracking is the intentional practice of placing students into heterogeneous classrooms usually in an effort to reduce the opportunity gap and allow all students to learn mathematics at high levels. Detracking requires the interruption of policies that have led to the inequitable sorting of students into mathematics courses. If detracking is to happen, school districts and states must go through the difficult process of establishing a new vision for mathematics teaching and learning that dispels the culture of “low” and “high” students as well as “faster means smarter.” This will undoubtedly involve a change in educators’ beliefs about who can and cannot do mathematics. School districts must be aware that teachers, coaches and leaders will need intense professional development before and during the process of detracking as well as continued support throughout. In addition, districts will need to communicate to parents and community stakeholders to assure them that students that have traditionally been in the “higher” levels of tracking will remain competitive with detracking.

The detracked mathematics courses will need differentiated instructional materials and approaches that support heterogeneous classrooms with students of varying levels, learning experiences and demographic backgrounds. This type of instruction will provide opportunities for students to demonstrate a balance of conceptual understanding of mathematical concepts, procedural fluency of mathematics skills and the ability to apply mathematical knowledge to solve problems. Research shows that often the students who participate less and are positioned as not smart are African American students and students whose primary language is not English.⁸ Teachers’ use of culturally responsive pedagogies and complex instruction have been found to provide more equitable participation in mathematics because both

⁶ Boaler, 2016

⁷ Huinker, 2019

⁸ Martin, 2009; Zavala, 2014

provide opportunities for mathematical discourse and increased contributions from students traditionally left out. Research also suggests that mathematics tasks which are group worthy and rich with detail are best suited for engaging students of all ability levels⁹ and hence are well suited for use in heterogeneous classrooms.

As stated earlier, we acknowledge that the detracking of math courses alone will not create equitable math instruction. There is a myriad of variables contributing to the opportunity and achievement gaps and interacting with detracking policies.¹⁰ Issues like systemic racism and stereotype threat¹¹, challenges with teacher recruitment, training, and retention¹², and other factors interact with the opportunity and achievement gaps as well. Detracking continues to be “tied to larger social inequities and racial injustice.”¹³ Therefore, the goal of detracking will not be realized without working to dismantle the various social, political, and cultural reasons tracking persists.¹⁴ Those that have been privileged by the current system must be willing to give up that privilege for more equitable schooling.

Recent Evidence from Research and Practice that Supports our Position

There are promising studies about schools and school systems which detracked their courses with positive effects, including specific advancements in students’ opportunities to learn, teaching practices, and student achievement.¹⁵ For example, Garrity found evidence to suggest that removing tracking and teaching all students as if they were high achievers did not “drag down” high achievers, but rather pulled up the performance of average students when math classes were detracked in Rockville Centre, New York starting in 2001.¹⁶ Even more recently in her 2016 AERA Presidential Address, Oakes, reported on research that found previously successful students seemed to do every bit as well in detracked settings as they had in tracked settings, as did previously struggling students.¹⁷

Additionally, there have been some successful examples of educational achievement outside the United States where students are taught in heterogeneous groups until sometime in high school.¹⁸ NCTM (2019) has highlighted several case studies of school districts and state departments of education that are making bold moves toward more equitable mathematics programs that benefit all students (see www.nctm.org) including the work unfolding in San Francisco, California. In 2014, San Francisco’s Board of Education unanimously passed the Math Course Sequence Policy, which established heterogeneous math courses through the end of tenth

⁹ Cohen, 1994

¹⁰ Oakes & Guiton, 1995; Welner & Carter, 2013

¹¹ Steele, 2011; Carter, 2012

¹² Moore Johnson, 2003; Ladson-Billings, 2009; Carver-Thomas & Darling-Hammond, 2017

¹³ Rubin & Noguera, 2010

¹⁴ Oakes, Wells, & Associates, 1996

¹⁵ Rubin, 2010

¹⁶ Garrity, 2004

¹⁷ Oakes, 2018

¹⁸ Hiebert, et al., 2005; Provasnik, et al., 2016

grade while still offering acceleration for students who wish to pursue advanced math coursework later in high school. With San Francisco's graduating class of 2019 as the first group of students to experience this mathematics course pathway, starting with a full year of grade 8 CCSSM in heterogeneous classrooms, there is some early evidence of greater access to mathematics courses to students and more diverse students accessing higher levels of mathematics courses.

How All Stakeholders Can Implement Our Position

In Support of this position statement, NCSM offers the following recommendations:

- Leaders and policymakers should:
 - Adopt policies in mathematics which detrack courses with appropriate prerequisites and supports
 - Detrack students' mathematics courses at the middle and high school
 - Detrack teachers at the middle and high school levels ensuring balanced teaching assignments so that more experienced teachers have both upper-level and entry-level mathematics courses
 - Create a systemic plan that includes a shared vision and purpose for mathematics including:
 - Broadening the purposes for teaching mathematics
- Teachers of mathematics should:
 - Teach according to equity-based instructional practices (i.e., standards-based mathematics instruction, complex instruction, culturally relevant teaching, and teaching mathematics for social justice, etc.)¹⁹
 - Adopt a mindset needed to support the development of students from different levels of skill and knowledge in mathematics, and examine bias towards students who traditionally have been excluded from opportunities to take higher level math courses
 - Teach from a non-deficit perspective (planning instruction based on students' strengths not their deficits) in order to develop students mathematical identities, increase their agency toward doing mathematics and improve their disposition of mathematics²⁰
- Sustained professional learning and coaching for teachers and leaders to develop the conditions needed for heterogeneity in mathematics courses and equitable teaching practices (i.e., diversity of thinking, growth mindset, student math identity development, etc.)
- Providing teachers time for collaboration about new instructional strategies to assist with differentiated teaching of rigorous mathematics that prepares students with a set of skills that centers on the communication and use of mathematical language
- Providing parental outreach to communicate to parents and the community on the needs for and benefits of detracking

¹⁹ Rubel, 2017

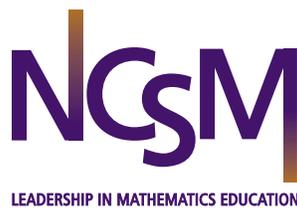
²⁰ Aguirre et al., 2013

- Program and curriculum developers should:
 - Adopt existing or develop new content materials that support heterogeneous classrooms (i.e., group-worthy mathematics tasks, cognitively demanding mathematics tasks, etc.)
 - Develop a curriculum that is accessible to all students and addresses students' mathematics identity and agency (i.e., culturally relevant mathematics tasks, mathematics tasks with multiple entry points, etc.)
- Informal educators (all adults outside of the classroom including parents, after school programs, summer educational camps, museums, etc.) should:
 - Assist with developing positive math identities in all students through engaging students in mathematical experiences that draw on community knowledge
 - Provide enrichment activities that connect mathematics to familiar everyday activities
 - Provide diverse role models in STEM-related fields for students
- Institutions of Higher Education
 - Universities, colleges, and community colleges should continue to refine admissions language to better align with standards that address appropriate mathematical rigor rather than a listing of course completion (i.e., rethinking course requirements other than Calculus)
 - Work together with K-12 systems to ensure academic continuity in mathematics

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High School Math Pathways Project

Communication Toolkit



OREGON
MATH
PROJECT

*Meaningful Math
for Every Student*



Meaningful Math for All



OREGON MATH PROJECT

Meaningful Math for Every Student

Realizing the vision of math education in Oregon includes ensuring that all students attain mathematics proficiency. This vision is realized through access to high-quality instruction that includes both challenging and relevant content in a learning environment where each student receives the support they need to succeed in mathematics. This is the work of the Oregon Math Project.

The Oregon Math Project (OMP) advances mathematics education in the state by cultivating a network of educators that promotes equitable math achievements for all students through guidance and the support of policies, standards, curricula, assessments, and instructional best practices.

This document is the full communication toolkit for Administrators, School Counselors, and Math Educators & Specialists. This is a guide and resource for implementing Oregon High School Math Pathways.

This Communication Toolkit provides the full work and list of resources, for a brief introduction and summary of this project, see the [High School Math Pathways Executive Summary](#).

NOTE:

This Communication Toolkit contains multiple pages and has been designed with screens in mind. At any time, if you wish to go back to the table of contents of this document, click the title of the project in any footer.

Table of Contents



Click on a desired topic to go directly to that page.

Introduction to the Toolkit	1
Oregon is Part of a National Movement	2
Modernized Math Initiatives Across the Nation	3
Re-Engineering Math Systems for Oregon Students	4
Math as a Filter	5
Math as a Pump	6
The Four Cornerstones	7
Modernizing Math for K-12 Students	8
Navigating the Cornerstones & Resources	9
The Four Cornerstones	10
<i>Focus</i>	10
<i>Engagement</i>	16
<i>Pathways</i>	22
<i>Belonging</i>	27
High School Math Pathways FAQ	33
Glossary	35
Attached Resources & External Links	37

Introduction to the Toolkit

Why are high school math course sequences changing?

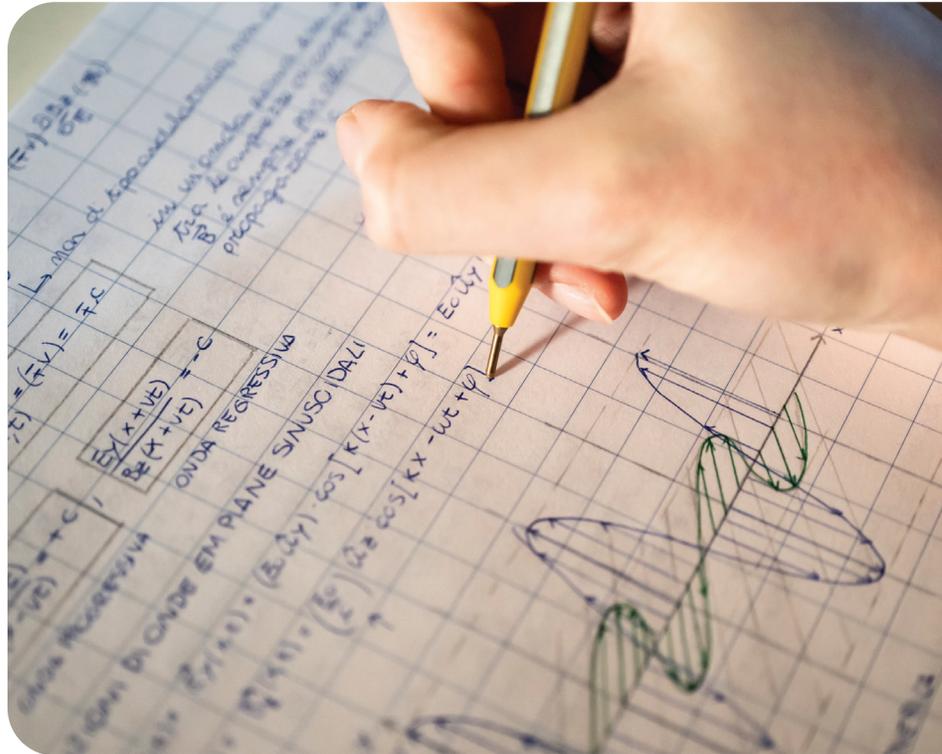
Math education must evolve to meet the educational and career needs and aspirations of all students. We need to prepare Oregon students for 21st century careers and to be informed and engaged citizens in a world with changing technology that requires data literacy. Math instruction must support all students and offer options to help them reach their educational goals and career aspirations.

PURPOSE

The purpose of this toolkit is to support Oregon school district administrators, school counselors, and math educators and specialists to communicate about the changes to high school mathematics defined as the Oregon Math Project.

STRUCTURE

The toolkit is structured to provide overview information about the changes to high school mathematics followed by tools aligned to each cornerstone that administrators, counselors, and math leaders and specialists can use to communicate and enact the Oregon Math Project.



The vision of mathematics education in Oregon is to provide all students with a mathematical foundation that supports them to make sense of the world around us, to communicate effectively, and to discover innovative solutions.

Oregon is Part of a National Movement

Aligning K-12 with Higher Education and Career Readiness

Oregon seeks to align the two systems of K-12 and higher education in order to change the trajectory for the future generations of students, providing them with the tools they need to achieve their full potential. This includes meeting the demands of the ever-changing workforce and ensuring students have the skills to meet those needs.

The Oregon Department of Education (ODE), Higher Education Coordinating Commission (HECC) and Oregon Community College Association (OCCA) are in partnership to align the math requirements for high school graduation and college admission. Representatives from a wide range of institutions collaborated to design an equitable admissions process⁽¹⁾ rather than limiting students to a few specific math course titles. The work continues with aligning dual-credit high school College Now math courses with the Common Course Numbering⁽²⁾ completed by

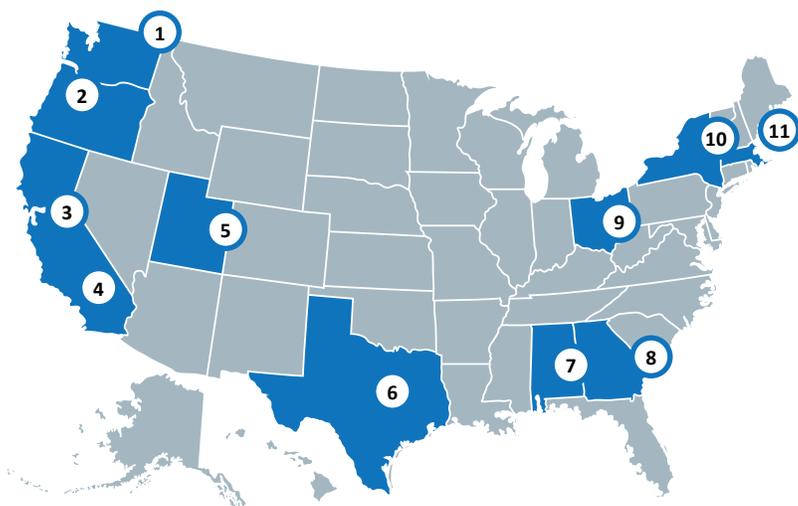
higher education. The common course numbering system, initiated through Oregon Senate Bill 233, aims to identify and articulate course learning outcomes implemented by all 24 public higher education institutions in Oregon.

This work is not just occurring in the state. Oregon has joined a national movement through the Launch Years Initiative⁽³⁾ in modernized systems aimed at modernizing math systems. In modernized systems, math equips all students with the mathematical tools that will help them pursue their future goals.

Oregon has joined 25+ other states in a nationwide effort to improve K-16 math pathways and outcomes.



Modernized Math Initiatives Across the Nation

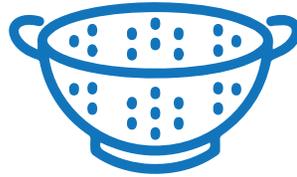


This map includes a sample of other states' initiatives to build alternatives to the traditional math track:

Algebra → Geometry →
Advanced Algebra

- 1 Washington**
Legislated student choice in their 3rd year high school math class.
 - [New Pathway Policies](#)
- 2 Oregon**
Updated admissions requirements at public colleges and universities. Algebra 2 is no longer a requirement for admission starting Fall 2024.
 - [Admissions Page](#)
- 3 San Francisco Unified School District, CA**
Removed tracks in K-12 mathematics courses and create a compacted Algebra 2 + Precalculus course.
 - [Detracked Mathematics Progress](#)
 - [Alg2+Precalc](#)
- 4 California**
Updated admission language at public colleges and universities like the UCs and Stanford.
 - [UC System](#)
 - [Stanford's New Math Admissions](#)
- 5 Utah**
Engaged in high school math pathways work that supports students' informed course-taking decisions.
 - [Pathways Work](#)
 - [Informed Decisions](#)
- 6 University of Texas at Austin, TX**
Started the Launch Years Initiative through the Charles Dana Center to support 20+ states and districts in implementing modern and open math pathways.
 - [Dana Center Mathematics Pathways](#)
 - [States Involved in Math Pathways Reform](#)
- 7 Alabama**
Reworked their high school math standards to focus on essential concepts. High school students now select math courses that best align with their goals.
 - [Alabama Course of Study Mathematics](#)
- 8 Georgia**
Ended remedial mathematics course-taking in college and has seen dramatic increases in equitable outcomes.
 - [Alternative To Remedial Education](#)
- 9 Ohio**
Established multiple math pathways for high school students aligned to postsecondary careers.
 - [Math Modeling and Reasoning](#)
 - [Decision Tree](#)
- 10 Ithaca City School District, NY**
Removed tracks in K-12 mathematics, centering equity and community voice throughout the process.
 - [What's wrong with tracking students by math ability?](#)
- 11 Harvard University, MA**
Updated admissions priorities that emphasize forms of service and deep learning over high status course-taking and test scores.
 - [New Admissions Priorities](#)

Re-Engineering Math Systems for Oregon Students



Uri Treisman of the University of Texas at Austin shared a metaphor of math education being designed as a **filter**, one that sorts and labels students as “math” or “non-math” people. In place of the filter, the challenge before us is to reimagine an equitable system that, like a **pump**, moves and lifts all students to their goals.

FILTER: Engineered for Inequity

For generations, we have limited opportunities and access for students by promoting a one-size-fits-all approach to high school mathematics, marching all students on a path designed for success in Calculus. This approach has privileged some students and either left out or pushed out other students.

Currently, only about one third⁽¹⁾ of Oregon’s high school students meet proficiency on statewide math test scores. Even fewer students of color, economically disadvantaged, and English learners demonstrate proficiency. Students report that they do not see relevance in mathematics courses and do not see themselves as “math people.”

PUMP: Re-Engineering for Equity

At the heart of this work is reimagining the math education system to stop it from acting as a filter in the system that sorts students into different educational tracks, and transform it into a pump that lifts a student to achieve whatever educational and career goals they have for themselves.

The Oregon Math Project encompasses multiple initiatives designed to increase the number of students who are on track to graduate. These initiatives also have a goal of increasing opportunities for students to learn and apply mathematics that will prepare them for the next phase of their mathematical journey.

What are Oregon students saying?

“Give more open-ended assignments that make me think and research real-world problems and ways we could solve them.”

Student in Corvallis School District

“In regular Algebra you took notes and did problems. In this class we do projects. I’m learning more math and it sticks.”

Student in Salem-Keizer School District

Engineered for *Inequity*

Where we are now

Simple starting actions to help understand the filters happening in your communities:

Start with Stories

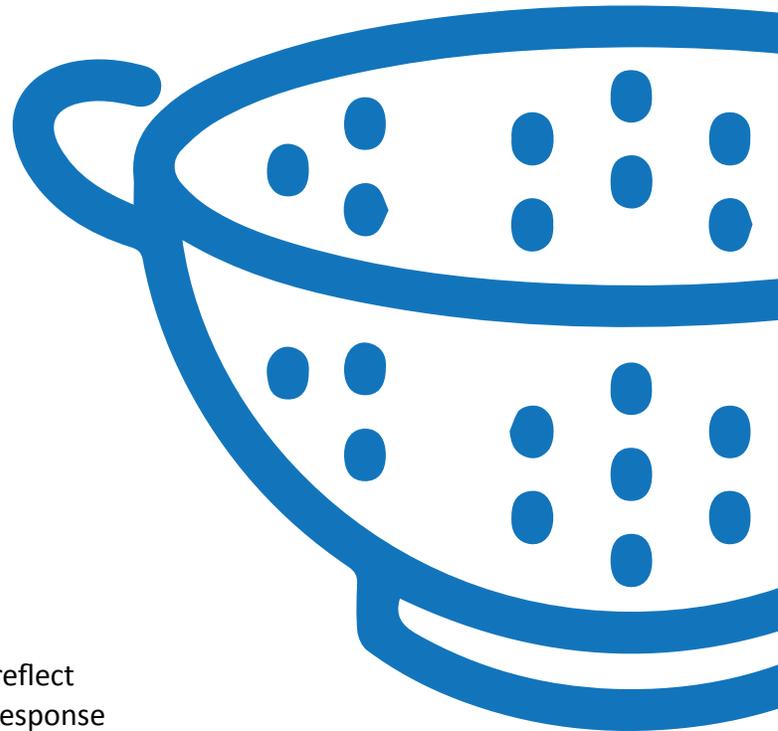
Use this protocol to support your staff and community to reflect on their own math stories and how this may inform their response to efforts to transform the mathematics education system.

Resource Tool: [Starting with Story](#)

Understand how math may be functioning a filter in your system

Use this Oregon Department of Education equity lens to assess how your math program is designed and who is filtered out of your mathematics education program.

Resource Tool: [Oregon Department of Education Equity Lens](#)



NOTE:

Throughout this document, you will find **internally linked resources**. If selected, you will be taken to the bottom of this document in the Attached Resources & External Links section.

Click on the blue icon in the top right corner to go back to the main page (shown below)



Appendix B – Oregon’s Education Equity Lens

Purpose of Oregon’s Education Equity Lens

The purpose of this equity lens¹ is to clearly articulate the shared goals we have for our state and the intentional investments we will make to reach our goal of an equitable educational system.

This equity lens helps educators and decision-makers recognize institutional and systemic barriers and discriminatory practices that have limited student success in the Oregon education system. The equity lens emphasizes underserved students, such as out of school youth, English Language

Attached Resources & External Links

This is the start of the Attached Resources and External Links section. Here, you will find all internal/external resources that have been linked throughout the toolkit above.

[Click on a desired link to quickly access that resource.](#) |  [Click on the icon in the top right corner to scroll back to this page.](#)

Communication Toolkit Beginning Pages p. 1 - 8

Oregon is Part of a National Movement <ul style="list-style-type: none">• Admissions Process• Common Course Numbering• Launch Years Initiative	Modernizing Math for K-12 Students <ul style="list-style-type: none">• OER Illustrative Math Modernized Math Initiatives Across the Nation <ul style="list-style-type: none">• New Pathways Policies
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Re-engineered for *Equity*

Where we want to be



Simple starting actions to help understand how to make math more like the pump:

Communicate the vision of modern mathematics

The critical work outlined in this toolkit can raise questions and concerns. Here you will find advice about how to respond and resources that offer additional support.

Resource Tool: [High School Math Pathways FAQ](#)

Clear messaging around national and state efforts tied to your district's vision, plan, and readiness will help build stakeholder support.

Resource Tool: [Key Talking Points](#)

The Four Cornerstones

The Oregon Math Project has identified cornerstones that come together to create a **more modern and equitable system of mathematics within the state.**



Four Cornerstones Principles of the Oregon Math Project

Craft a vision for shifting your mathematics program from a filter to a pump.

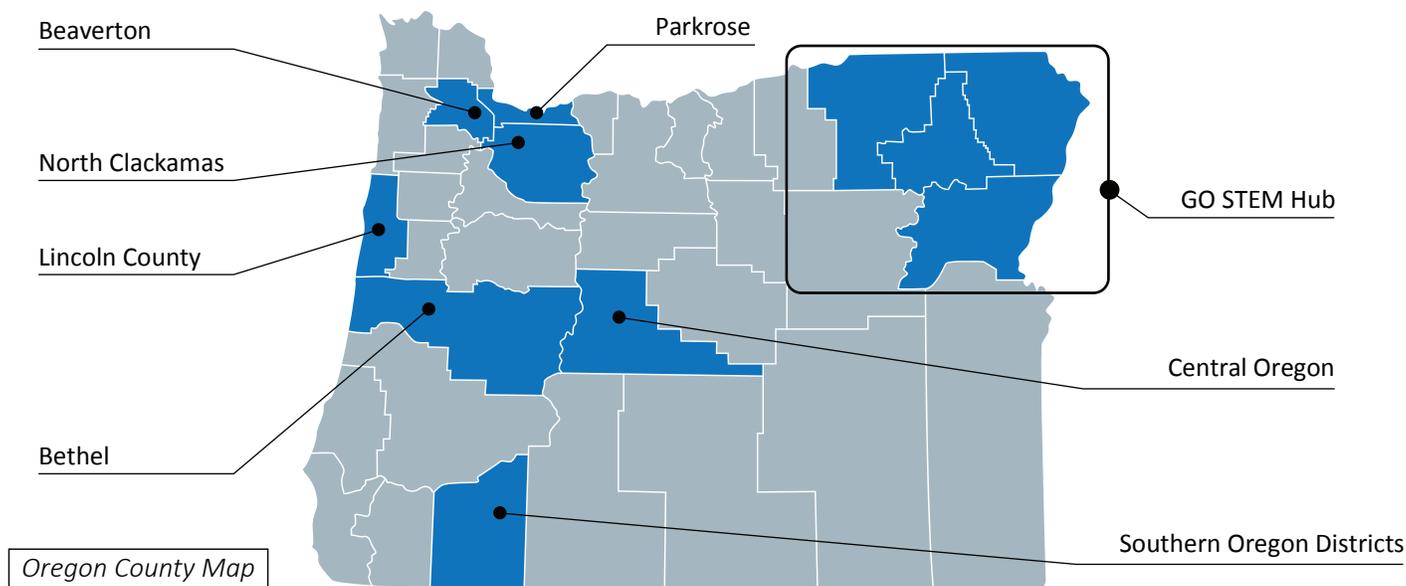
Use these resources to engage multiple stakeholders in a process to craft a unique vision for your context to that aligns to the cornerstones of the Oregon Math Project: Focus, Engagement, Belonging and Pathways

Resource Tool: [Where Are You Now?](#)

Case Study: [Gresham Barlow Visioning Work](#)

Modernizing Math for K-12 Students

Using the [Oregon Math Project Cornerstones](#), Oregon districts are reshaping their high school math programs to better help students reach their college and career goals. These efforts include: innovating math program data collection and use, adopting curriculum and classroom practices that center student agency, providing modern and aligned course options, and opening math pathways to all students. This map highlights some of the Oregon Math Project-aligned initiatives happening across Oregon.



Beaverton School District

Offering a new modernized math pathway: data science & statistics, and evaluating the four cornerstones (focus, engagement, pathways, belonging) in their K-12 math program.

Bethel School District

Using student data to drive pathways decisions, which led to detracking their K-10 math program.

Central Oregon Districts

Piloting a new third credit math course: Data Science.

GO STEM Hub

Supporting six school districts in piloting a third credit course in the quantitative reasoning pathway.

- *Wallowa County: Joseph SD, Enterprise SD*
- *Baker County: Pine Eagle SD*
- *Umatilla County: Ukiah SD*
- *Union County: Union SD, North Powder Union SD*

Lincoln County Districts

Piloting a new third credit course, Financial Algebra, offered in the quantitative reasoning pathway.

North Clackamas School Districts

Increasing engagement and belonging by using complex instruction practices in their detracked middle school math courses.

Parkrose School Districts

Using student-centered data to drive their belonging work to detrack their K-12 math program.

Southern Oregon Districts

Aligning their new high school math pathways with their CTE programs.

Umatilla School Districts

Bringing better focus and engagement to their math courses by using [OER Illustrative Math](#).

Navigating the Cornerstones & Resources

This toolkit has been designed for digital use and is an interactive PDF where icons and links can be selected. This page describes how to navigate the Cornerstones portions of this toolkit.



The Four Cornerstones

Each Cornerstone portion is divided into four sections and color-coded for easy reference. The introduction (blue) is a basic overview of some key topics and definitions of each cornerstone. The following three sections (purple, green, orange) are for specific audiences.

- Introduction
- Administrators
- School Counselors
- Math Educators & Specialists

Cornerstone, & Audience

Throughout the cornerstone pages, you will find external and internal resources/tools.

NOTE: Clicking on an internal resource will bring you to the [Attached Resources & External Links](#) section at the end of the document.

If you wish to go back to the table of contents of this document, click the title of the document here.

Each icon in the top right of the cornerstone pages will link you back to the introduction section.

When you reach the end of a cornerstone section, you have the option to pick a new cornerstone to directly skip to that topic.



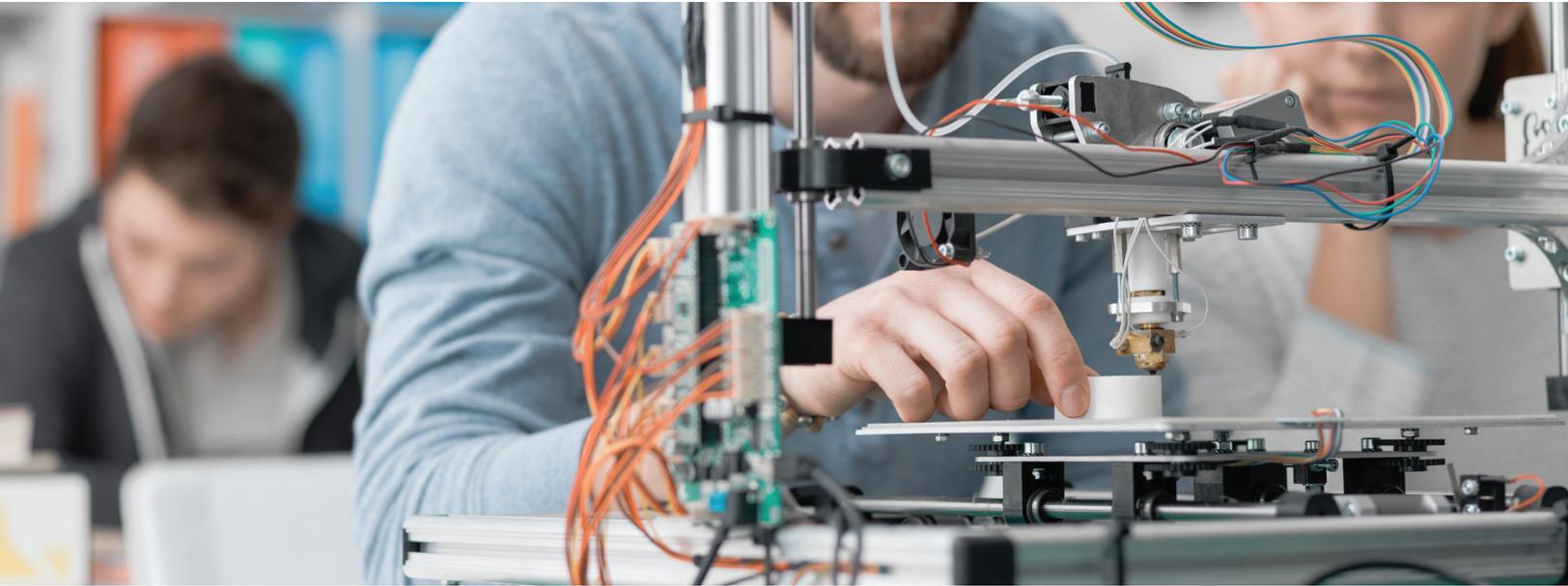
FOCUS





What do we mean by focus?

Equitable, modern and meaningful math programs ensure that learning experiences in every grade and course are *focused* on core mathematical content and practices that lead to mathematical understanding as the content and practices progress purposefully across grade levels.



What's new in the 2021 Oregon Math Standards?

Focus on Content, *not* Courses

- Modern mathematics courses need to focus on [2021 Oregon Math Standards](#).
- Don't make assumptions about what is called "Algebra 1." Much content has shifted between traditionally named courses.

Major Shifts in the New Standards:

- **Brand new standards about data reasoning.**
This means a new K-12 progression of standards that support students to reason about data.
- **Emphasize *reasoning* about all domains of mathematics**
This means students shouldn't be following procedures without understanding why they work and where they came from.
- **Emphasize *authentic* math modeling experiences**
This means students make sense of the world around them with grade level appropriate mathematics.
- **Emphasize modern *technology***
This means using technology for calculating, graphing and computing in service of reasoning and authentic problem solving.

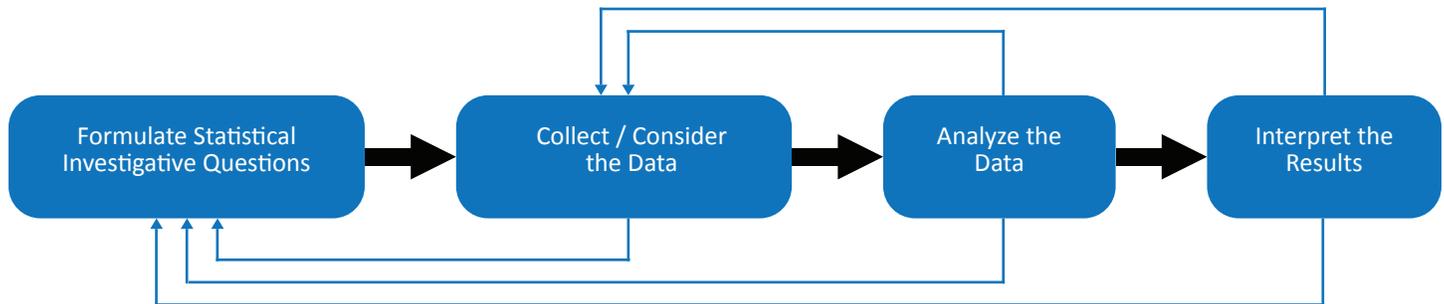


Data Reasoning: A New Domain in the 2021 Oregon Math Standards

All students in Oregon will now experience Data Reasoning, K-10, as part of their math learning.

What is Data Reasoning?

The [GAISE II Data Reasoning Framework](#) shows the statistical problem-solving process Oregon students will experience as they reason with data.



Why is this new domain important?

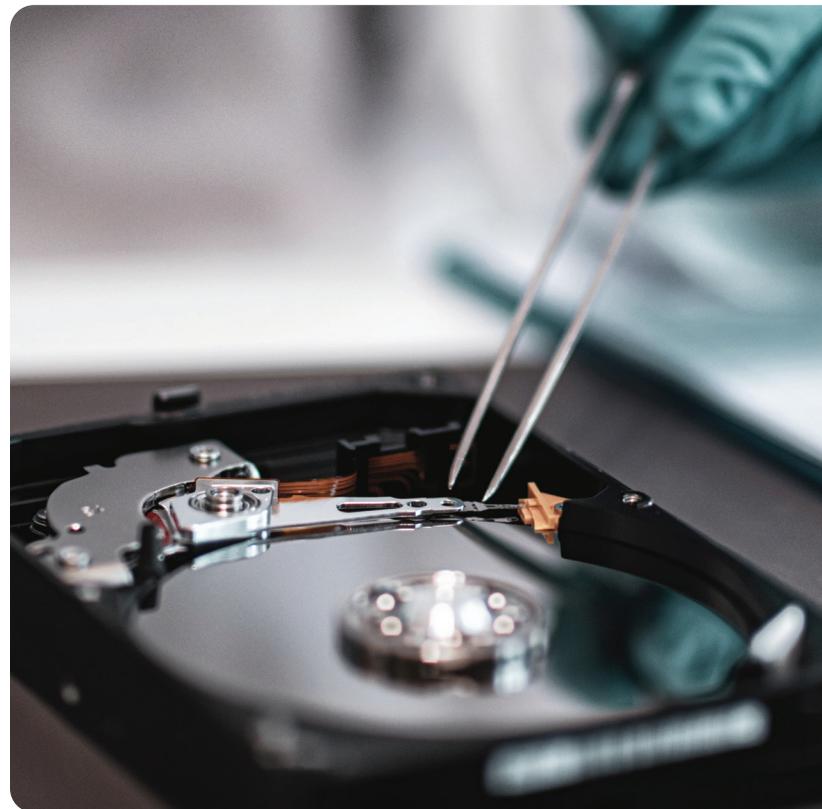
Modern math programs equip every K-12 student with the data literacy skills needed in our modern world. These skills open doors to higher education, high-paying careers, and align with many students' goals.

Data Science: An Exciting New Option for +1 Math Courses in Oregon

As students complete their learning of the K-10 Data Reasoning Standards, they are well positioned to go deeper with data in a +1 math course.

What is Data Science?

Data Science is a [rapidly growing field and very popular college major](#). Data Science courses for high school students are [rolling out at many US high schools](#); many Oregon high schools are planning to, piloting, or already offering Data Science as a +1 math course.



Find more detailed information and resources about Data Reasoning and Data Science [here](#).



Key Topics, Actions, & Resource tools

Focus on Content, Not Courses

K–12 instructional programs in Oregon must be planned in alignment with the adopted math content standards, not on historic course names and/or packaged publisher materials.

Key Action: *Structure time for math teachers to identify how the 2021 Oregon Math Standards align with your current math program content and what content changes are needed to modernize their math courses.*

Resource Tools:

- [Complete List of the 2021 Standards](#)

Focus on Modern math with High-Quality Materials

The new Oregon Math Standards have an explicit increased focus on technology and mathematical modeling. High-quality instructional materials can support teachers in implementing the modern Oregon Math Standards effectively.

Key Action: *Support teachers to anchor math learning with modern technology, real-world contexts through the use of high-quality materials.*

Resource Tools:

- [Research brief from OSU on Math Modeling](#)
- [Oregon Department of Education Instructional Materials Adoption Toolkit](#)
- [Instructional Materials Adoption Support - Example from Lane ESD](#)

Focus on Coherence

The new Oregon Math Standards have an increased coherence in learning progressions from grades K-10.

Key Action: *Lead learning opportunities for teachers to engage in vertical alignment work around this coherence.*

Resource Tools:

- [Domain specific progressions documents](#)



Focus on Community Engagement

The Oregon Math Project offers the opportunity to bolster existing community engagement efforts by integrating the topic of mathematics.

Key Action: *Engage community members by listening to how mathematics is used in local and relevant contexts and learning about how modern approaches to mathematics can incorporate and connect to the community.*

Resource Tools:

- [Community Engagement Toolkit](#) (from Aligning for Student Success: Integrated Guidance for Six ODE Initiatives)
- [Tool: Math Night Resources Slide deck](#)



Key Topics, Actions, & Resource tools

Focus on Content, Not Courses

Math learning must be based on Oregon Math Standards, not on historic course names and/or packaged publisher materials.

Key Action: *Understand these content changes at a high level so they can emphasize that historic course titles (i.e. “Algebra”) have updated content associated with them.*



Focus on Community Engagement

The Oregon Math Project offers the opportunity to bolster existing community engagement efforts by integrating the topic of mathematics.

Key Action: *Engage their community to ensure families understand the vision of the Oregon Math Project and how they can be involved in the process.*

Resource Tools:

- [Community Engagement Toolkit](#) (from *Aligning for Student Success: Integrated Guidance for Six ODE Initiatives*)
- [Tool: Math Night Resources Slide deck](#)

Focus on Coherence

School counselors serve the critical role of supporting students in planning for their post-secondary futures.

Key Action: *Support their school in staying aligned with national changes so students have all doors open to them upon graduation.*

Resource Tools:

- [New Admissions Requirements for Oregon](#)
- [A New Calculus for College Admissions](#)
- [Link to SCED codes](#)
- [Link to NCAA guidance](#)
- [Link to Dana Center resources](#)





Key Topics, Actions, & Resource tools

Focus on Content, Not Courses

K–12 instructional programs in Oregon must be planned in alignment with the adopted math content standards, not on historic course names and/or packaged publisher materials.

Key Action: *Structure time for math teachers to identify how the 2021 Oregon Math Standards align with your current math program content and what content changes are needed.*

Resource Tools:

- [Overview of New Standards - Presentation](#)
- [Unadopted HS Standards](#)
- [Modernizing Math Classes with Data](#)

Focus on Modern math with High-Quality Materials

The new Oregon Math Standards have an explicit increased focus on technology and mathematical modeling. High-quality instructional materials can support teachers in implementing the modern Oregon Math Standards effectively.

Key Action: *Support teachers to bring technology and real-world contexts into math learning.*

Resource Tools:

- [Research brief from OSU on Math Modeling](#)

Focus on Coherence

The new Oregon Math Standards have an increased coherence in learning progressions from grades K-10.

Key Action: *Lead learning opportunities for teachers to engage in vertical alignment work around this coherence.*

Resource Tools:

- [Domain Specific Progressions Documents](#)

Focus on Community Engagement

The Oregon Math Project offers the opportunity to bolster existing community engagement efforts by integrating the topic of mathematics.

Key Action: *Engage their community in learning about how new approaches make math learning more relevant and valuable and hearing how mathematics is used in their contexts.*

Resource Tools:

- [Tool: Math Night Resources Slide deck](#)

EXPLORE OTHER CORNERSTONES OF THE OREGON MATH PROJECT

[Engagement](#) Pg. 16

[Pathways](#) Pg. 22

[Belonging](#) Pg. 27



ENGAGEMENT



167



What do we mean by engagement?

Mathematical learning happens in environments that motivate all students to *engage* with relevant and meaningful issues in the world around them.

Modern pedagogical moves need to be implemented to shift from a system that filters to a system that pumps.

Ambitious Math Teaching: Engagement & Belonging

Ambitious math teaching describes inclusive moves that promote students of all abilities, racial, ethnic, and class backgrounds in understanding mathematical ideas, participating in discourse, and solving authentic problems. Based in the framework of [Complex Instruction](#), Ambitious Math Teaching goes further to explicitly center marginalized students.

Learn More:

- [Asynchronous course](#)
- [Principles to Action](#)

Focus on Standards

- Modern mathematics courses need to focus on the 2021 Oregon Math standards.
- Don't make assumptions about what is called "Algebra 1." Much content has shifted between traditionally named courses.
- Ensure teachers are reading the new standards carefully and check:
 - What is the evidence that students are **REASONING** about mathematics?
 - Which standards require **AUTHENTIC** math modeling experiences?
 - Where can **TECHNOLOGY** take the place of rote procedural calculations?

Equity-Based Mathematics Principles

[Aguire, Mayfield-Ingram and Martin \(2013\)](#)

Going Deep with Mathematics

Lessons include high cognitive demand tasks that support and strengthen student development of the strands of mathematical proficiency, including conceptual understanding, procedural fluency, and problem solving and reasoning.

Leveraging Multiple Mathematical Competencies

Recognizing and positioning students' various mathematical backgrounds and competencies is a key equity-based practice.

Affirming Mathematics Learners' Identities

Instruction that values multiple mathematical contributions, provides multiple entry points, and promotes student participation in various ways (teams, groups, and so on) can aid the development of a student's mathematical learning identity.

Challenging Spaces of Marginality

Practices that embrace student competencies, diminish status, and value multiple mathematical contributions are essential to cultivate.

Drawing on Multiple Resources of Knowledge

Equity-based teaching includes helping students bridge everyday experiences to learn mathematics, capitalizing on linguistic resources to support mathematics learning, recognizing family or community mathematical practices to support mathematics learning, and finding ways to help students learn and use mathematics to solve authentic problems that affect their lives.

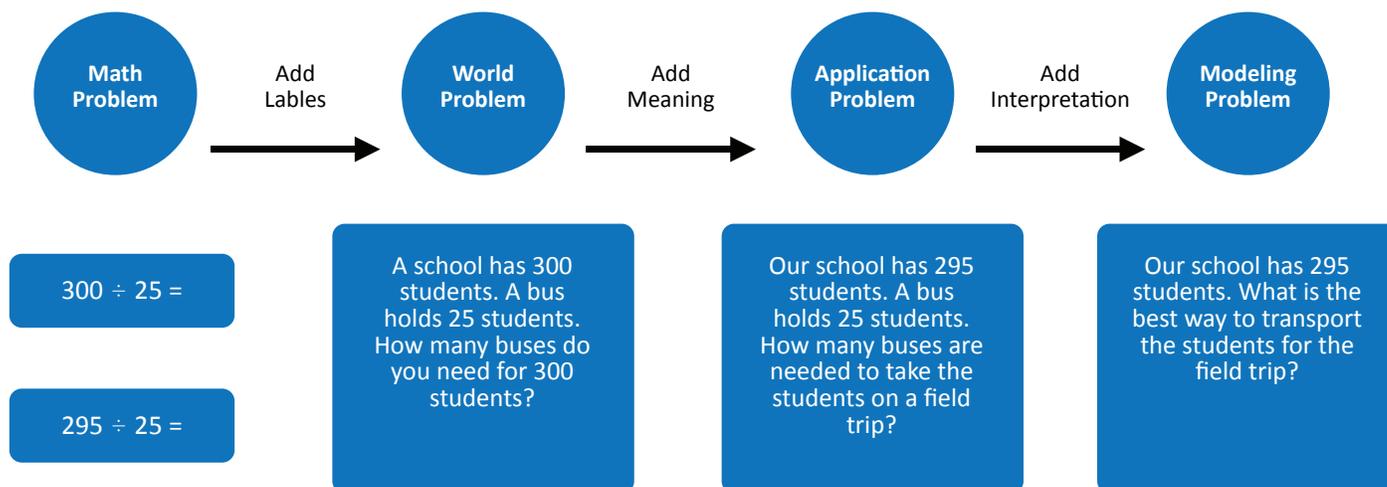


Engage in Relevant Tasks Through Mathematical Modeling

During math modeling tasks, students apply mathematical thinking and concepts to real world scenarios. Mathematical modeling tasks can draw from students' funds of knowledge and have them address problems they care about, while helping them learn how to apply math flexibly and beyond the classroom.

Resource Tool: [Research brief from OSU on Math Modeling](#)

How are Math Modeling Problems Different from Traditional Math Problems?



Integrate Technology

2021 Oregon Math Standards explicitly call for the use of technology, particularly at the high school level. According to the [National Council of Teachers of Mathematics](#), “an excellent mathematics program integrates the use of mathematical tools and technology as essential resources to help students learn and make sense of mathematical ideas, reason mathematically, and communicate their mathematical thinking” (2014). Ultimately, we need to position our students as the thinkers, designers and creators of the next generation of technology that they will become.

Examples in Action:

- [Desmos](#)
- [Mathigon](#)
- [GeoGebra](#)
- [CODAP](#)

Helpful Verbs

- **Conceptual Understanding:** connect, represent, compare/contrast, critique
- **Procedural Fluency:** find the error, estimate, generalize, find efficiencies
- **Strategic competence:** represent a situation, use a model, identify relationships,
- **Adaptive reasoning:** defend, critique, choose, justify, prove
- **Productive disposition:** reflect, notice growth, set goals, apply math to areas of interest

National Research Council. (2001). Adding it up: Helping children learn mathematics. J Kilpatrick, J. Swafford, and B. Findell (Eds.). Mathematics Learning Study Committee, Center for Education, Division of Behavioral and Social Sciences and Education. Washington, DC: National Academy Press.



Key Topics, Actions, & Resource tools

Engage All Students with Ambitious Math Teaching

The Oregon Math Project applies the ideas of Ambitious Math Teaching in which students of all abilities, racial, ethnic, and class backgrounds, engage with authentic math tasks through discourse and collective problem solving.

Key Action: *Ensure teachers have access to professional development aligned to the principles of Ambitious Math Teaching.*

Resource Tools:

- [Complex Instruction - Stanford University](#)
- [Research Brief from OSU on Classroom Discourse](#)

Engage All Students with Modern Mathematics

The new Oregon Math Standards have an explicit increased focus on technology, mathematical modeling, and data reasoning standards. Integrating these three elements authentically takes training and support.

Key Action: *Ensure teachers have access to professional development on integrating technology, mathematical modeling, and data reasoning.*

Resource Tools:

- [Research Brief from OSU on Math Modeling](#)
- [Modernizing Math Classes with Data](#)





Key Topics, Actions, & Resource tools

Engage All Students with Ambitious Math Teaching

Mathematical learning happens in environments that motivate all students to engage with relevant and meaningful issues in the world around them. ***Graduation requirements can, at times, place undue pressure on counselors to emphasize credit attainment over engaging learning experiences.***

Key Action: *Communicate the values of engaging mathematical learning experiences and work with administrators and math educators to ensure any alternative credit attainment methods offer high quality learning experiences.*

Resource Tools:

- [Evaluation Tool for Alternative Math Credit Bearing Courses](#)

Engage All Students with Modern Mathematics

Mathematical learning happens in environments that motivate all students to engage with relevant and meaningful issues in the world around them. ***What is relevant and meaningful is unique to individual students and counselors play a critical role in learning about individual students.***

Key Action: *Share the values, aspirations and desires of individual students - particularly those who are marginalized in traditional mathematics programs - so that the reformed mathematics program can embrace content and pedagogies that will engage students.*

Resource Tools:

- [Letter to Teacher](#)





Key Topics, Actions, & Resource tools

Engage All Students with Ambitious Math Teaching

The Oregon Math Project applies the ideas of Ambitious Math Teaching in which students of all abilities, racial, ethnic, and class backgrounds, engage with authentic math tasks through discourse and collective problem solving.

Key Action: *Engage in or provide professional development aligned to the principles of Ambitious Math Teaching.*

Resource Tools:

- [Complex Instruction - Stanford University](#)
- [Research Brief from OSU on Classroom Discourse](#)

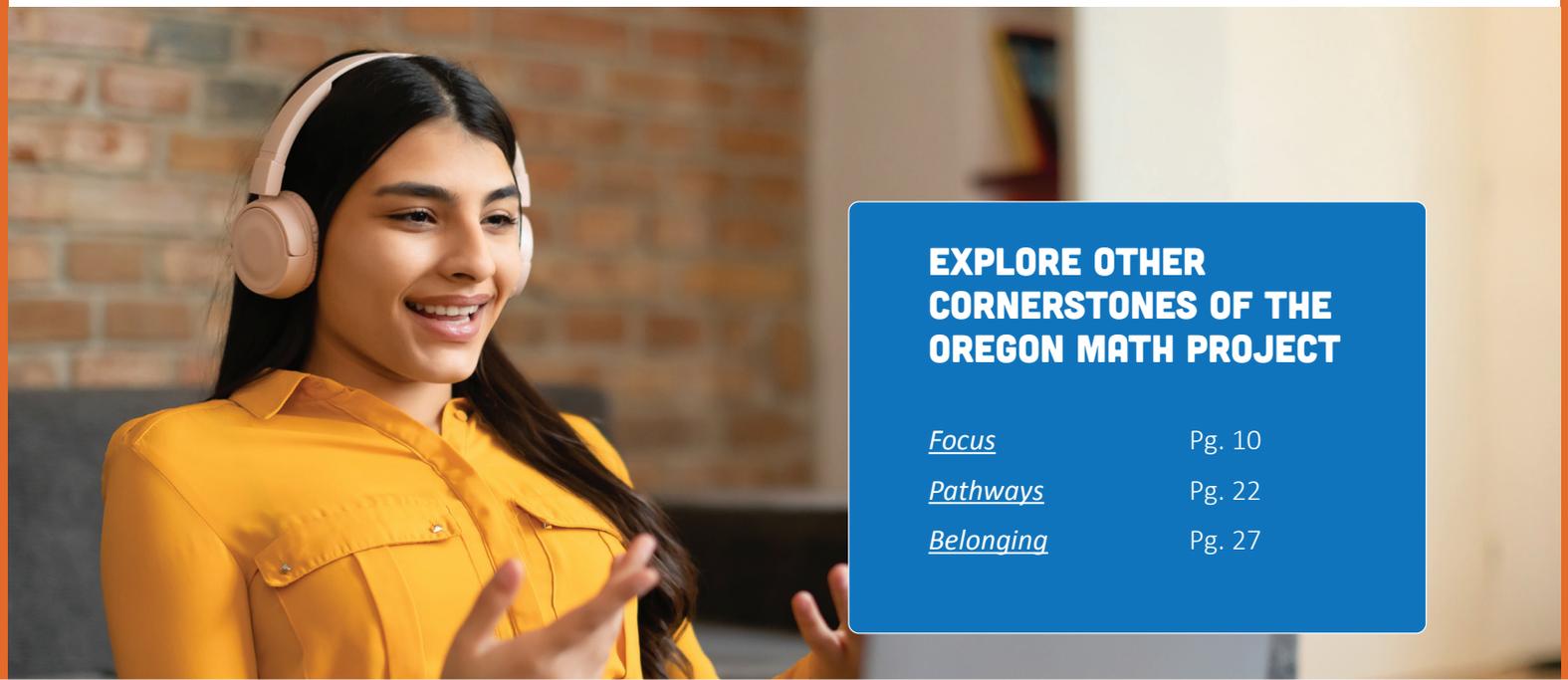
Engage All Students with Modern Mathematics

The new Oregon Math Standards have an explicit increased focus on technology, mathematical modeling, and data reasoning standards. Integrating these three elements authentically takes training and support.

Key Action: *Engage in or provide professional development on integrating technology, mathematical modeling, and data reasoning. Further, educators and specialists evaluate math tasks with the cornerstones and identify improvement priorities.*

Resource Tools:

- [Research brief from OSU on Math Modeling](#)
- [Modernizing Math Classes with Data](#)
- [OMP Math Task Improvement Tool](#)



EXPLORE OTHER CORNERSTONES OF THE OREGON MATH PROJECT

[Focus](#) Pg. 10

[Pathways](#) Pg. 22

[Belonging](#) Pg. 27



PATHWAYS





What do we mean by pathways?

All students are equipped with the mathematical knowledge and skills necessary to identify and productively pursue any postsecondary *paths* in their future. Students have agency to choose from a variety of courses, contexts, and applications they find relevant.

The 2+1 course pathway model provides the structure for this innovation. It begins with two credits of **core content** for all students, and **third credit pathway options** that align to student interests and goals.

Ensuring students have access to modern and relevant high school mathematics will take innovation and creativity to re-imagine what course experiences could look like for Oregon students.

Centering Equity when Designing High School Math Pathways:

- Who has been successful in mathematics in your district? How do you measure that?
- Who is accessing advanced math courses? Does this reflect the diversity of your student population?
- How do students gain access to math courses? Are there barriers to access such as prerequisites?
- What assumptions are you making in your course placement processes? What marginalizing practices are being upheld by these assumptions?

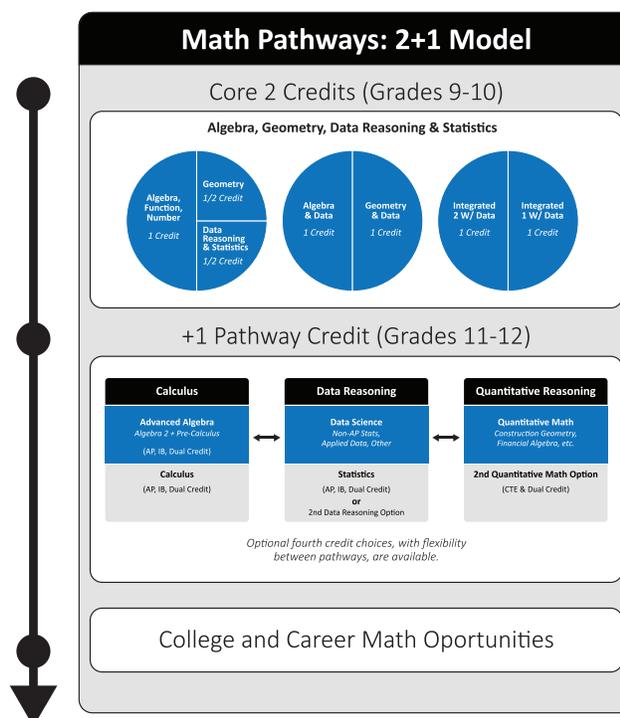
Core Content

- Core content is balanced between approximately one credit of algebra, ½ credit of geometry, and ½ credit of data science and statistics. Core 2 courses focus on the [2021 Oregon Math Standards](#).

Third Credit Options

- For third credit options, Oregon high school staff are invited to innovate by offering new specialized courses within three general paths:
 - (1) a pathway to calculus;
 - (2) a pathway to data science;
 - (3) and a pathway to quantitative mathematics.

Third credit content prepares students for (or already is) college-level math courses at the 100 level.





Key Topics, Actions, & Resource tools

Student Voice Drives Paths

For +1 math course options (third and fourth credit) to function as a “pump,” where math learning prepares students for modern college and career success, student voice must be at the center for pathways design efforts.

Key Action: *Integrate the selection of a student’s +1 math course with their existing college and career planning process so that students and families are well-informed about their choices.*

Resource Tools:

- [Pathways Overview for Parents - Presentation](#)
- [High School Math Pathways FAQ](#)

Design Paths for Equity

+1 math courses are key for launching students into college and career success. The 2 +1 model recognizes and designs for the many branches of mathematics relevant to a student’s postsecondary plans, rather than limiting them to one based on historical practices.

Key Action: *Ensure that districts (and schools) offer well-designed +1 courses that center the Oregon Math Project cornerstones, align with student goals, prepare students for workforce needs, and position students for college admissions success.*

Resource Tools:

- [Designing +1 Math Courses](#)
- [Dana Center’s Launch Years Recommendations](#)

Assess Equity of Pathways

The dominant math pathway aimed at Calculus currently sorts students in predictable demographic patterns. The 2 + 1 model empowers students to choose their third and fourth credit courses based on their interests – not on their demographic information.

Key Action: *Check that district (and school) math pathways are operating with equity at the center by analyzing course-taking patterns and outcomes with an equity lens.*

Resource Tools:

- [Oregon Department of Education Equity Lens](#)





Key Topics, Actions, & Resource tools

Student Voice Drives Paths

For +1 math course options (third and fourth credit) to function as a “pump,” where math learning prepares students for modern college and career success, student voice must be at the center for pathways design efforts.

Key Action: *Integrate the selection of a student’s +1 math course with their existing college and career planning process so that students and families are well-informed about their choices, including updated language in university admissions policies in Oregon and beyond.*

Resource Tools:

- [How is Higher Education Changing in Oregon?](#)
- [Just Equations Report](#)
- [Harvard Admissions](#)





Key Topics, Actions, & Resource tools

Student Voice Drives Paths

For +1 math course options (third and fourth credit) to function as a “pump,” where math learning prepares students for modern college and career success, student voice must be at the center for pathways design efforts.

Key Action: *Provide structured and ongoing ways for student voice to inform the creation and iteration of +1 math courses.*

Resource Tools:

- [Pathways Overview for Parents - Presentation](#)
- [High School Math Pathways FAQ](#)

Design Paths for Equity

+1 math courses are key for launching students into college and career success. The 2 +1 model recognizes and designs for the many branches of mathematics relevant to a student’s postsecondary plans, rather than limiting them to one based on historical practices.

Key Action: *Design +1 courses that center the Oregon Math Project cornerstones, align with student goals, prepare students for workforce needs, and position students for college admissions success.*

Resource Tools:

- [Designing +1 Math Courses](#)
- [Dana Center’s Launch Years Recommendations](#)

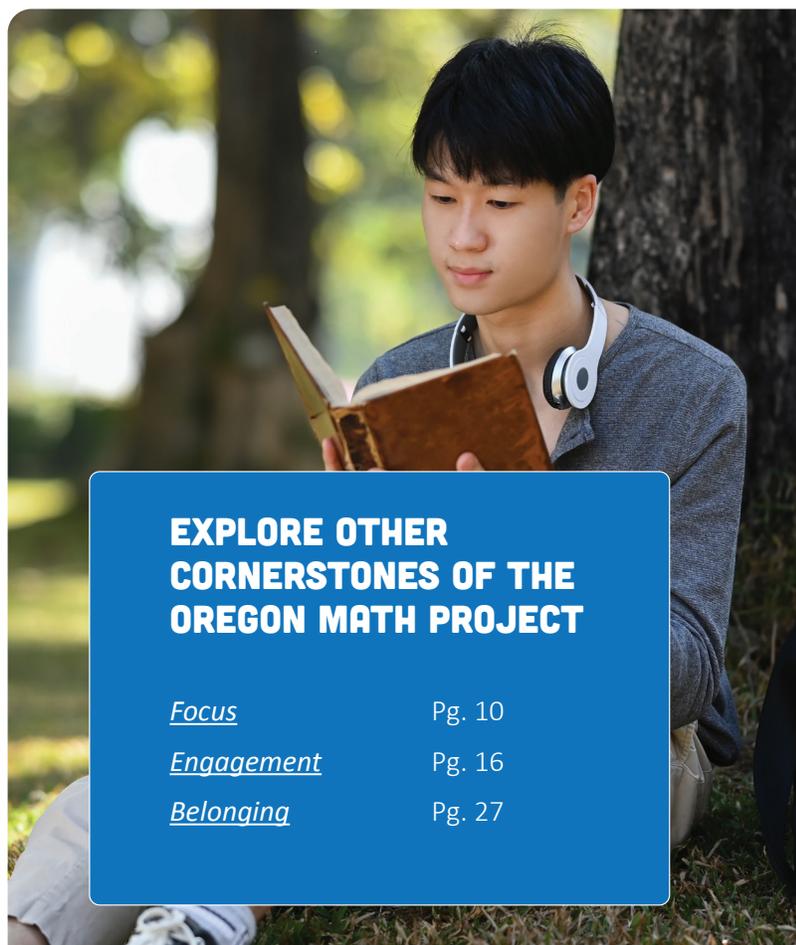
Assess Equity of Pathways

The dominant math pathway aimed at Calculus currently sorts students in predictable demographic patterns. The 2 + 1 model empowers students to choose their third and fourth credit courses based on their interests – not on their demographic information.

Key Action: *Reflect on the enrollment and outcomes of their +1 courses and be responsive if these new courses are reproducing inequities of traditional math courses.*

Resource Tools:

- Data collection towards representative enrollment and outcomes on paths

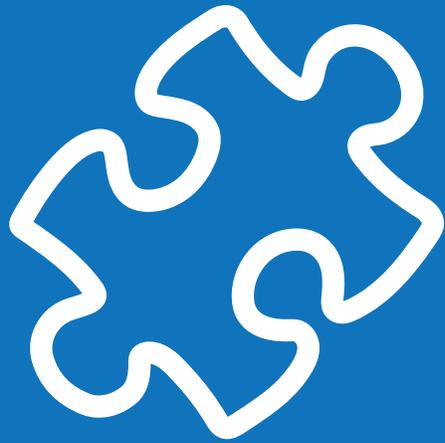


EXPLORE OTHER CORNERSTONES OF THE OREGON MATH PROJECT

[Focus](#) Pg. 10

[Engagement](#) Pg. 16

[Belonging](#) Pg. 27



BELONGING



What do we mean by belonging?

Participation in mathematical learning builds students' identities as capable math learners and fosters a positive self-concept. Students' culture and linguistic assets are valued in ways that contribute to a sense of *belonging* to a community of learners. Students need not shed their individuality and conform to dominant culture norms in order to be successful.

Myths that Drive Filtering

Deeply problematic myths are at the root of our inequitable mathematics education system. As we work to re-engineer this system, these myths must be recognized, uprooted, and replaced with research-based knowledge about teaching and learning.

Myth 1

Students learn more/better in homogeneous groups.

What the Research Says

A meta-analysis demonstrated that students in detracked groups performed better academically than tracked peers (Rui, 2009).

A multi-level modeling study found that students in "lower" tracks are 60% more likely to dropout of high school (controlling for other factors) (Werblow et al, 2013).

[Boaler & Foster \(2021\)](#) found 65% of students who were enrolled in accelerated classes were required to repeat the classes when they went to high school.

Myth 2

Students, especially those tracked into low skilled groups, feel more positive about themselves when they are in homogeneous groups.

What the Research Says

Tracking creates a self-fulfilling prophecy of behavior in students and plays an important role in defining the type of person that they believe themselves to be (Ansalone, 2009).

Tracking has a negative impact on the overall attitude and self-concept of students in lower tracks (Sukhnandan & Lee, 1999).

Student self-concept is healthier in untracked schools (Ireson and Hallam, 1999).

Myth 3

Placement processes accurately and fairly reflect past achievement and future potential.

What the Research Says

The result of tracking is a reproduction of social class and unequal access to resources (Battey, 2013).

Domina (2014) used multi-level modeling to discover that even when students have similar skills, characteristics such as race and class can influence MS math course placement.

With a rank-based regression discontinuity design, Card & Giuliano (2016) found that putting non-gifted students in gifted courses led to significant gains in achievement.



Myth 4

Teaching is easier when students are in homogeneous groups.

What the Research Says

Tracking creates a self-fulfilling prophecy of behavior in students and plays an important role in defining the type of person that they believe themselves to be (Ansalone, 2009).

Instead, complex instruction and other heterogeneous grouping instructional strategies can promote teacher success and satisfaction ([Horn, 2006](#)).

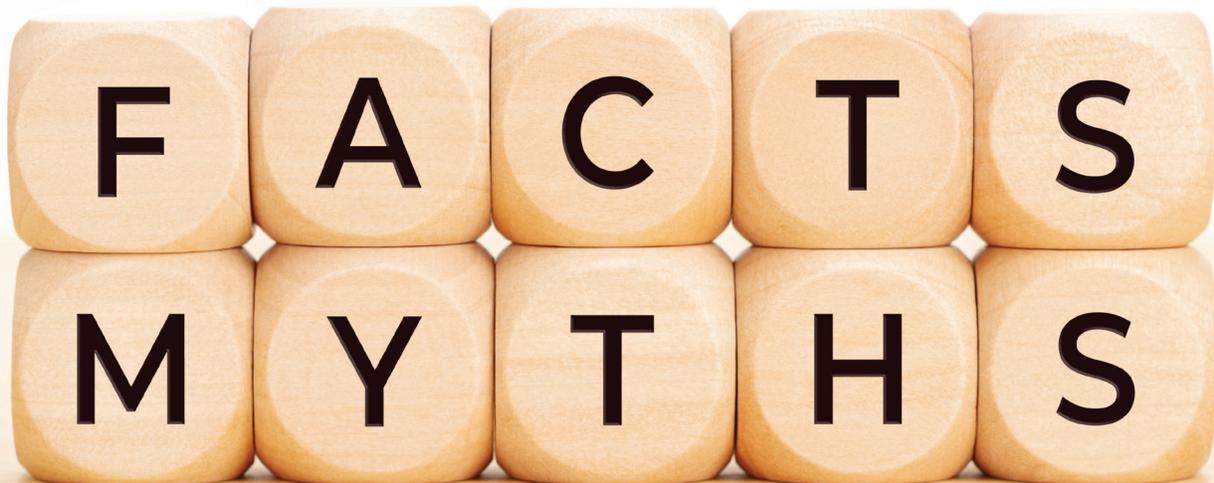
Read more about these myths in Jeannie Oaks book
[Keeping Track: How Schools Structure Inequality](#)

“Shifting deficit beliefs is often challenging as people generally do not recognize the deficit perspectives they hold; instead they view these perspectives as normal rather than developed over time through stereotypical, and then institutionalized, cultural narratives”

Catalyzing Change in Middle School, NCTM

How do we uproot these myths?

- Call out these myths when you hear them: they are challenged by [40+ years of education research](#). Get familiar with tracking research and share it whenever these myths are used to rationalize inequities in our math systems.
- Invite educators to consider how these myths negatively impact our students. Ask them to share experiences that challenge these myths.
- Practice responding to statements that promote these myths: [High School Math Pathways FAQ](#)





Key Topics, Actions, & Resource tools

Students Belong in Heterogeneous Classrooms:

Tracking is the practice of segregating students by perceived ability into separate mathematics courses or fixed-groups. This practice is common in most math programs despite a lack of evidence for its effectiveness and ample evidence for its production of inequitable outcomes.

Key Action: *Interrogate tracking practices with an equity lens and dismantle these systems to ensure all students develop a sense of belonging in richly diverse and heterogeneous classrooms. This process should involve diverse voices including students, families, educators and community-members in equity-based, research informed decision making.*

Resource Tools:

- [Introduction to Detracking Mathematics - Presentation for Teachers](#)
- [Introduction to Detracking Mathematics - Presentation for Parents](#)
- [OSU Research Brief on Tracking](#)
- [Detracking Math in Oregon series, hosted by the Math Coaching and Leadership Network](#)

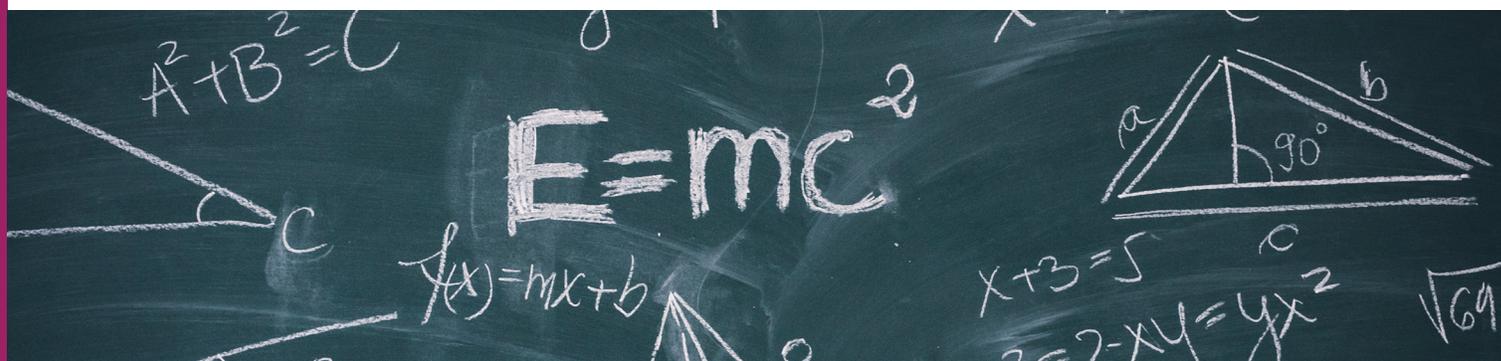
Math Belongs to Everyone

To develop positive math identities in all students, education personnel must critically examine how cultural norms and classroom structures reinforce ideas about who is a “math person.” Mindful design, with asset-based framing, can create truly equitable environments where all students learn how to apply math with purpose and power.

Key Action: *Integrate mathematics educators into their efforts for supporting students’ social emotional learning.*

Resource Tools:

- [ODE Social Emotional Learning Toolkit](#)
- [How Do We Ensure Access for All?](#)
- [What is Math Identity?](#)
- [OSU Research Brief on Equity](#)
- [High School Math Pathways FAQ](#)





Key Topics, Actions, & Resource tools

Students Belong in Heterogeneous Classrooms:

Tracking is the practice of segregating students by perceived ability into separate mathematics courses or fixed-groups. This practice is common in most math programs despite a lack of evidence for its effectiveness and ample evidence for its production of inequitable outcomes.

Key Action: *Interrogate outcomes of current mathematics course-taking patterns with an equity lens and offer their perspective to the process of reevaluating course offerings.*

Math Belongs to Everyone

To develop positive math identities in all students, education personnel must critically examine how cultural norms and classroom structures reinforce ideas about who is a “math person.”

Key Action: *Communicate with students and families about the diverse mathematics-rich opportunities that are available to ensure all students see how mathematics plays a role in their future.*

Resource Tools:

- [High School Math Pathways FAQ](#)
- [A New Calculus for College Admissions](#)
- [ODE Social Emotional Learning Toolkit](#)





Key Topics, Actions, & Resource tools

Students Belong in Heterogeneous Classrooms:

Tracking is the practice of segregating students by perceived ability into separate mathematics courses or fixed-groups. This practice is common in most math programs despite a lack of evidence for its effectiveness and ample evidence for its production of inequitable outcomes.

Key Action: *Interrogate outcomes of current mathematics course-taking patterns with an equity lens and offer their perspective to the process of reevaluating course offerings.*

Resource Tools:

- [Introduction to Detracking Mathematics - Presentation for Teachers](#)
- [Introduction to Detracking Mathematics - Presentation for Parents](#)
- [OSU Research Brief on Tracking](#)
- [OSU Research Brief on Equity](#)
- [Detracking Math in Oregon series, hosted by the Math Coaching and Leadership Network](#)

Math Belongs to Everyone

To develop positive math identities in all students, education personnel must critically examine how cultural norms and classroom structures reinforce ideas about who is a “math person.”

Key Action: *Learn about the impact of identity in mathematics. Educators and specialists must go beyond the quip “we are all math people” and reflect on curriculum, instructional, assessment or structural decisions that implicitly communicate to students that they are or are not a “math person.”*

Resource Tools:

- [How do we Ensure Access for All?](#)
- [What is Math Identity?](#)
- [OSU Research Brief on Equity](#)
- [High School Math Pathways FAQ](#)



EXPLORE OTHER CORNERSTONES OF THE OREGON MATH PROJECT

<u>Focus</u>	Pg. 10
<u>Engagement</u>	Pg. 16
<u>Pathways</u>	Pg. 22

High School Math Pathways FAQ

The critical work outlined in this toolkit can raise questions and concerns. Here you will find advice about how to respond, as well as resources that offer additional support.

Someone Says . . .

“Students with IEPs and ‘low’ math learners can’t handle being with other students. They can’t keep up and need to learn math that their peers already know. They need their own math classes.”

You Might Say . . .

“Isolating students and labeling them as ‘low’ prevents students from developing a positive math identities, which we know is a key part of student success in math. Students deserve to learn in heterogeneous classrooms with all of their peers and work on grade level math. It is very unlikely that students exit low math tracks once they are in them. We have inherited systems that make math a barrier for many of our students; we want to remove those barriers and open math pathways to all of our students. We are redesigning our math classes to be supportive, engaging, and full of rich, relevant learning for all of our students.”

Key Resources: [The Opportunity Myth](#) [The Trouble with “High” and “Low”](#)

Someone Says . . .

“How are advanced students supposed to get to Calculus on time? This is messing up their ability to get into good colleges.”

You Might Say . . .

“We inherited Calculus from the 1950’s space race; Calculus puts a lot of pressure on K-12 math programs to quickly accelerate students; when this happens, students miss more relevant and foundational math learning. Calculus is losing status in college admissions and is only relevant for a small percentage of college majors (ex. engineering). We also know students who take Calculus in high school are extremely unlikely to take any math beyond that course. That said, we are still offering a Calculus pathway, and are making it accessible by [name your approach: doubling up 9-10th grade, compacting Alg 2 and Pre-calc, etc].”

Key Resources: [A New Calculus for College Admissions](#) [Example of a compacted Algebra 2 + Precalculus course](#)
[Re-Envisioning Mathematics Pathways to Expand Opportunities](#)

Someone Says . . .

“I can’t teach a class with students at so many levels, it’s not possible.”

You Might Say . . .

“Research from the last 40+ years has shown how classroom strategies like Complex Instruction can offer the differentiated, deep learning that our students need. It can also help our students build their SEL skills, construct positive math identities, and engage with more relevant and open-ended math learning. No matter what, we are always teaching students with diverse needs and interests; let’s stop replicating systems that harm students and limit their options.”

Key Resources: [40+ Years of Tracking Research](#) [The Truth About Tracking](#)
[OSU Research Brief on Tracking](#)

High School Math Pathways FAQ

Someone Says . . .

“TAG and ‘advanced’ students need courses that challenge them. Otherwise they will be bored and not living up to their potential.”

You Might Say . . .

“Yes, our students deserve math classes that are exciting and engaging. We know that a strong, foundational experience in middle school math leads to increased student success in high school, including more students opting to take an optional 4th year of math. We also know students who take Algebra in middle school are much more likely to repeat the course in high school. We are redesigning our middle school and high school math experiences so that our math classes are engaging and supportive, and full of rich and modern math learning. These changes benefit all of our students, including students who are designated TAG. Research shows that students learn best in heterogeneous groups, including our ‘advanced’ math learners.”

Key Resources: [Predictors of Algebra 1 Repetition](#) [The Trouble with “High” and “Low”](#) [Rethinking Giftedness](#)

Someone Says . . .

“These new math courses sound nice, but they won’t be accepted by colleges.”

You Might Say . . .

“Starting in the fall of 2024, Algebra 2 will no longer be an admissions requirement at public colleges and universities in Oregon; at this point, alternatives to the Algebra 2 → Calculus pathway are expected to have equal weight in Oregon admissions. Many other higher ed institutions in the US, including elite private colleges like Harvard and Stanford, have made strong admissions statements that they will not privilege Calculus over courses like Statistics and Data Science. The higher ed admissions landscape is shifting, and we believe it is critical that we offer math pathways that better match many of our students’ interests and goals.”

Key Resources: [A New Calculus for College Admissions](#) [The Multiplier Effect: Dual Enrollment x Math](#)

Someone Says . . .

“Why are you making all these changes? It hasn’t been working in other places that have tried this.”

You Might Say . . .

“Oregon is one of 25+ states committed to improving and modernizing math pathways. In our current system, math creates significant barriers that prevent many students from reaching their goals. Our district is building a math program that aligns with our students’ goals, reflects how math is used in our local workforce, and prepares students for college admissions and college success. Colleges and universities in our state and around the US are making similar changes. Data in our district and across the country supports these reforms.”

“I’m curious, could you share any examples you’re referencing? Any links or research is very appreciated; we want to understand what you’re seeing and hearing so we can be more informed when we respond to any concerns.”

Key Resources: [Dana Center Launch Years Initiative](#)
[San Francisco Unified School District Work to End Tracking and Offer Four Years of Meaningful Math Instruction](#)

Glossary (P.1)

2 + 1 Model

- The “2+1 Model” refers to reformed pathways for our three-credit minimum high school math course sequences.
- The “2” refers to common math courses taken by all 9th and 10th grade students (sometimes these courses are called “Core 2” or “Core 9-10”).
- The +1 represents courses that students can complete as their third math credit requirement, typically taken during 11th and 12th grade. You may see many mentions of “new +1 courses”; this is because many districts are working to offer multiple, robust, and relevant pathways beyond the traditional Calculus pathway. Common 2+1 sequences are shown in the 2+1 HS Math Pathways diagram.
- A sign of math program improvement is when students, especially focal group students, are successfully earning credit at least two +1 courses before they graduate. Student +1 course taking can include multiple math pathways (example: a student taking CTE-Aligned Data Science in 11th grade and then Dual Credit Math in Society 105z in 12th grade).

Authentic

Authentic math tasks ask students to use math as they consider and address real-world, unresolved problems and questions that professionals, citizens, community-members, etc. grapple with.

Career-Ready

Career-Ready means that students have obtained math skills and credits that will help them apply relevant mathematics aligned with their career goals

College Ready

College-Ready means that students have the math skills and credits they need to succeed in college level (100+) math courses and earn the credits they need for their major or program.

Cornerstones

The work of engineering a more equitable math system is centered on four cornerstone principles of the Oregon Math Project: **Focus, Engagement, Pathways, and Belonging.**

Complex Instruction

In Complex Instruction, students learn in productive, heterogeneous teams. In this pedagogical framework, developed by educational researchers at Stanford University in the 1990s and used in many classrooms in the US and beyond, students engage with math tasks that are open-ended and rich, use norms and roles as they work together, and experience both individual and group level accountability for their learning. Teachers guide this work, intervening with “just-in-time” scaffolding, making needed status-interventions, leading cross-team learning, and collecting data on individual and team growth.

Data Reasoning

Data reasoning refers to the process of formulating questions that can be answered with data. Data collection, analysis, and interpretation follow. In any given data reasoning math lesson, students may engage in parts or all of this process. Across K-12 grade levels, the process can be adjusted for differing levels of complexity and use of technological tools.

Vs.

Data Science

Data science is a specific field that analyzes large data sets; writing programming code and use of statistics is common. Data science is a quickly growing field and a popular college major. High school data science courses are increasingly offered throughout the US.

Detracking

The process of restructuring mathematics courses to place students in mixed-ability, heterogeneous classes. Curricular and pedagogical changes must accompany any detracking effort to ensure that all students have access to high-quality mathematics instruction.

Glossary (P.2)

Filter	<p>The “Filter” metaphor, used throughout the Oregon Math Project refers to the predictable barriers students face in their math programs. Filtering is present when our math programs sort and label students as “math” or “non-math” people. Students can experience filtering in many ways:</p> <ul style="list-style-type: none">• <i>Uncertainty about the goals, importance and progressions of math learning (problems with Focus);</i>• <i>Lack of agency, excitement or appropriate challenge (problems with Engagement);</i>• <i>Unsure how their math courses help them reach their college/career goals (problems with Pathways);</i>• <i>And/or when math learning lacks cultural relevance or needed learning supports (problems with Belonging).</i>
Focal Group Students	<p>In alignment with the Student Success Act, the Oregon Math Project elevates the needs of students populations typically underserved and marginalized in K-12 systems. This includes, but is not limited to:</p> <ul style="list-style-type: none">• <i>Students of color,</i>• <i>Students with disabilities,</i>• <i>Emerging multilingual students, and</i>• <i>Students navigating poverty, homelessness, and foster care</i>
Math Modeling	<p>In math modeling tasks, students apply mathematical skills and habits of mind to a real world problem. Mathematical modeling questions are richly complex, ambiguous, and benefit from multiple approaches and perspectives. The process of mathematical modeling requires students to revise their work and report their findings, based on an appropriate audience.</p>
Modern Math	<p>In modern or modernized math, students learn and apply math skills that support current-day applications where technology is a regularly used tool. Modern math emphasizes the use of data and math modeling, where students apply math in complex, real-world settings.</p>
Pump	<p>In the “Pump” metaphor, used throughout the Oregon Math Project, districts reimagine their math programs as deeply equitable in design and impact, in which math learning lifts all students to the goals they want to achieve. Cornerstone-focused improvements, described throughout this toolkit, will help districts actualize the “Pump” metaphor in their math programs.</p>
Relevance	<p>When math learning has relevance, students understand how math connects with their lived experiences, offers valuable tools and frameworks, and prepares them for their post-secondary goals.</p>
Rigor	<p>“Rigor” is a debated term in math education. For many years, “rigor” has often meant “difficult.” Students may report that math is challenging or difficult for many reasons that have little to do with meaningful learning or growth. For example, students may find a math lesson difficult if it is poorly organized, confusingly worded, or lacks relevance. The National Council of Math Teachers (NCTM) asks that we be mindful when we think and talk about mathematical rigor.</p>
The Core	<p>“The Core” refers to common 9th and 10th grade math courses. These math courses engage students with the 2021 Oregon HS Math Standards which include roughly 1 credit of Algebra standards, ½ credit of Geometry Standards, and ½ credit of Data Reasoning standards. “The Core” is the “2” in “2+1” high school math pathways and can be structured in many ways (see the 2+1 HS Math Pathways diagram).</p>
Tracking	<p>The tracking of students for instruction in mathematics is a long-standing practice of schooling that segregates students of different backgrounds into separate experiences, based on perceived ability and prior performance, on pathways leading to different outcomes.</p>

Attached Resources & External Links



This is the start of the Attached Resources and External Links section. Here, you will find all internal/external resources that have been linked throughout the toolkit above.

Click on a desired link to quickly access that resource.



Click on the icon in the top right corner to scroll back to this page.

Communication Toolkit Beginning Pages

p. 1 - 8

Oregon is Part of a National Movement

- [Admissions Process](#)
- [Common Course Numbering](#)
- [Launch Years Initiative](#)

Re-Engineering Math Systems for Oregon Students

- [Setting the Charge for ORMAT](#)

Math as a Filter

- [Starting with Story](#)
- [Oregon Department of Education Equity Lens](#)

Math as a Pump

- [Advice for How to Talk About OMP](#)
- [Key Talking Points](#)

The Four Cornerstones

- [Where are You Now?](#)
- [Gresham Barlow Visioning Work](#)

Modernizing Math for K-12 Students

- [OER Illustrative Math](#)

Modernized Math Initiatives Across the Nation

- [WA - New Pathway Policies](#)
- [OR- Admissions Page](#)
- [CA - Detracked Mathematics Progress](#)
- [CA - Alg2+Precalc](#)
- [UC System](#)
- [Stanford's New Math Admissions](#)
- [UT - Pathways Work](#)
- [UT - Informed Decisions](#)
- [Dana Center Mathematics Pathways](#)
- [States Involved in Math Pathways Reform](#)
- [Alabama Course of Study Mathematics](#)
- [GA - Alternative to Remedial Education](#)
- [OH - Math Modeling and Reasoning](#)
- [OH - Decision Tree](#)
- [What's Wrong With Tracking Students by Math Ability?](#)
- [Harvard's New Admissions Priorities](#)

Focus Cornerstone

p. 10 - 15

Introduction

- [2021 Oregon Math Standards](#)
- [GAISE II Data Reasoning Framework](#)
- [Data Science - Rapidly Growing Field and Very Popular College Major](#)
- [Data Science is the Future. Let's Start Teaching It](#)

Administrators

- [Complete List of the 2021 Standards](#)
- [Research Brief from OSU on Math Modeling](#)
- [Oregon Department of Education Instructional Materials Adoption Toolkit](#)
- [Instructional Materials Adoption Support - Example from Lane ESD](#)
- [Domain Specific Progressions Documents](#)
- [Community Engagement Toolkit](#)
- [Tool: Math Night Resources Slide Deck](#)

REMINDER:

If you wish to go back to the table of contents of this document, click the title of the document here.



School Counselors

- [Community Engagement Toolkit](#)
- [Tool: Math Night Resources Slide Deck](#)
- [New Admissions Requirements for Oregon](#)
- [A New Calculus for College Admissions](#)
- [Link to NCAA Guidance](#)
- [Link to Dana Center Resources](#)

Math Educators & Specialists

- [Overview of New Standards - Presentation](#)
- [Unadopted HS Standards](#)
- [Modernizing Math Classes with Data](#)
- [Research Brief From OSU on Math Modeling](#)
- [Domain Specific Progressions Documents](#)
- [Tool: Math Night Resources Slide Deck](#)

Engagement Cornerstone

p. 16 - 21

Introduction

- [Complex Instruction](#)
- [Asynchronous Course](#)
- [Principles to Action](#)
- [Aguire, Mayfield-Ingram and Martin \(2013\)](#)
- [Research Brief from OSU on Math Modeling](#)
- [Technology is a Tool - National Council of Teachers of Mathematics](#)
- [Desmos](#)
- [GeoGebra](#)
- [Mathigon](#)
- [CODAP](#)

Administrators

- [Complex Instruction - Stanford University](#)
- [Research Brief From OSU on Classroom Discourse](#)
- [Research Brief from OSU on Math Modeling](#)
- [Modern Math Classes with Data](#)

School Counselors

- [Evaluation Tool for Alternative Math Credit Bearing Courses](#)
- [Letter to Teacher](#)

Math Educators & Specialists

- [Complex Instruction - Stanford University](#)
- [Research Brief from OSU on Classroom Discourse](#)
- [Research Brief from OSU on Math Modeling](#)
- [Modernizing Math Classes with Data](#)
- [OMP Math Task Improvement Tool](#)



Pathways Cornerstone

p. 22 - 26

Introduction (No Links)

Administrators

- [Pathways Overview for Parents - Presentation](#)
- [High School Math Pathways FAQ](#)
- [Designing +1 Math Courses](#)
- [Dana Center's Launch Years Recommendations](#)
- [Oregon Department of Education Equity Lens](#)

School Counselors

- [How is Higher Education Changing in Oregon?](#)
- [Just Equations Report](#)
- [Harvard Admissions](#)

Math Educators and Specialists

- [Pathways Overview for Parents - Presentation](#)
- [High School Math Pathways FAQ](#)
- [Designing +1 Math Courses](#)
- [Dana Center's Launch Years Recommendations](#)

p. 27 - 32

Belonging Cornerstone

Introduction

- [Detracking Research - Boaler & Foster \(2021\)](#)
- [Lessons Learned from Detracked Math Departments - Horn, 2006](#)
- [Keeping Track: How School Structure Inequality](#)
- [40+ Years of Education Research](#)
- [High School Math Pathways FAQ](#)

Administrators

- [Introduction to Detracking Mathematics - Presentation for Teachers](#)
- [Introduction to Detracking Mathematics - Presentation for Parents](#)
- [OSU Research Brief on Tracking](#)
- [Detracking Math in Oregon Series, Hosted by the Math Coaching and Leadership Network](#)
- [ODE Social Emotional Learning Toolkit](#)
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- [What is Math Identity?](#)
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- [High School Math Pathways FAQ](#)

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- [ODE Social Emotional Learning Toolkit](#)

Key Talking Points about the Oregon Math Project



Key Communication

We are not alone in this work. We are a part of national movement focused on aligning K-12 math programs with college mathematics, with student goals and needs, and with the ways math is used in our society.

Why is this Important?

Many people are fearful of making changes from their own understanding of how math programs are “supposed to” operate. However, we have ample research and personal experiences demonstrating K-12 mathematics does not align with the modern ways math is applied in postsecondary learning and careers. Change is needed.

“Tell me about your high school math courses and how you experienced mathematics.” [Listen and relate the changes to their own experience remembering to center historically and currently marginalized students.]

“We have heard from our post-secondary partners that our pathway focused on getting students ready for college is not preparing the majority of our students. In fact many colleges have deemphasized Calculus because courses like Statistics/Data Science. Our +1 courses like [name them here] are much more relevant for [name postsecondary majors & careers they align to]. “

“Another district [name the district] in Oregon, similar in [size, demographics: share the ways it is similar], is also engaged in this work. When they changed [name the equity-centered reform], their students [name the positive student impact]. We believe this is worth trying in our district and think it will benefit our students in similar ways.”

Key Communication

We have a vision for how we will make math meaningful for every student. Our stakeholders and student data are guiding our work.

Why is this Important?

Engaging your community early and often is critical. From this work you must be able to clearly state what is working and not working in your math program - and for whom.

“As a part of our community engagement events, we heard that mathematics courses are a major barrier for students. We know that our math program has been working well in some ways, like [name assets in your program]. Through work with our students, district families, and larger community, we have identified ways our program needs to change, like [name prioritized areas of reform work]. At the heart of this work, our vision is to make our math programs meaningful for every student in our district.”

Key Talking Points about the Oregon Math Project



Key Communication

We have a plan for this work, and it is something we are excited to iterate on over time, based on student data and community engagement.

Why is this Important?

Sharing plans, timelines and evaluation criteria will build trust that this ambitious work is possible and in good hands. Making it clear that plans are always adjustable guided by stakeholder input and data, will take away the “top down” feel of your work.

“Our plan is always a work in progress based on what we see in student impact data. We are tracking how [name reform, example: Core 2 heterogeneous grouping paired with new curriculum and classroom practices] is impacting our students [share data focus, example: high school students taking an optional 4th math credit]. We see that [name pattern/impact] and this tells us our next step is [share how you are adjusting/finding success in your plan].”

Key Communication

We are ready to do the on-going, complicated work of building a math program that helps every student reach their goals and continuously engages stakeholders.

Why is this Important?

Doing truly transformative work means that you are ready to dig into complexity and will shift systems in multiple ways. Showing that you understand this complexity and are focused on action will build confidence and buy-in in your stakeholders.

“We know that it isn’t enough to change our course offerings and pathways. We need to make sure our courses work well for all of our students when they are heterogeneously enrolled [Share the professional development you have and will be providing for teachers]. We will collect data on [share your plan] and will use this data to decide our next step [name when this will happen and how stakeholders will be engaged].”

Where Are You Now?



To begin this work, district leaders must engage multiple stakeholders in a visioning process to understand if and how a filter is operating in your system.

District Tool for Planning and Implementing Equity-Centered Math Reforms

Document Template: [Math Visioning Process](#)

Slide Template: [Making Math Meaningful for Every Student](#)



If you believe that your district is ready to start taking on this work, make sure you can agree to the following assumptions.

- We are committed to doing the hard work of reflecting on our math program, and how it must be improved to fully meet the needs of students who are marginalized and racialized in our societal and educational structures.
- We will be asset-based as we interrogate our math program.
- We will center asset-based views of learners, their experiences, and outcomes in this work.
- We will continuously recognize and dismantle ways that our math programs and systems have marginalized students.
- This tool will be used to drive on-going collaboration with our math program stakeholders.



Gresham-Barlow School District

In the 2021-2022 school year, Gresham-Barlow SD, guided by research and work done by the National Council of Teachers of Mathematics (NCTM), ODE, and other districts, engaged with stakeholder groups to define their district's "math vision." Their visioning team interviewed teachers and community members, and also conducted empathy interviews with elementary, middle, and secondary students.

Based on stakeholder input and student interviews, they developed this draft math vision statement:

"Math Students of GBSD . . .

- Believe they are capable doers of math and have a positive self concept in our community of mathematicians
- Make sense of mathematics in ways that are creative, interactive, authentic and relevant.
- Engage in discourse to problem solve and think critically about rigorous mathematics.
- Demonstrate academic success not predictable by race, ethnicity, gender, socioeconomic status, language, religion, sexual orientation, cultural affiliation, or special needs.
- Graduate from high school college and career ready with the math skills that will allow them to contribute to a global society"

In addition to their guiding vision statement, this stakeholder engagement work also supported updates to [Gresham-Barlow's Draft K-12 Universal Math Framework](#)

Putting Your Vision Into Action

Gresham-Barlow's math adoption teams will consider ways to apply this vision and framework as they review, pilot, and select math materials. Other applications (example: redesigning math pathways) and next steps are currently being considered.

Modernizing Math Classes with Data



The 2021 Oregon Math Standards include a new K-10 Data Reasoning domain. This emphasis on data will help modernize and build engagement in our math programs. Additionally, many Oregon high schools are considering or already offering +1 Data Science courses. “Data reasoning” and “data science” are often conflated; read this page to understand the similarities and differences, and how both can help transform your math program.

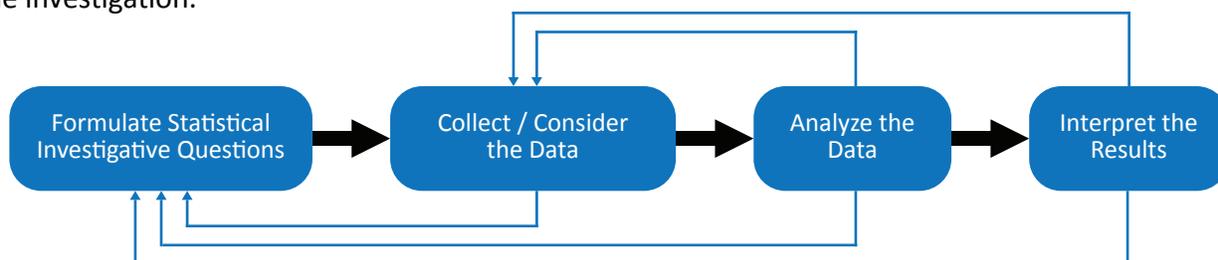
Data Reasoning: A new Domain in the 2021 Oregon Math Standards

All students in Oregon will now experience Data Reasoning, K-10, as part of their math learning.

See Link to Learn More: [2021 Oregon Math Standards for Data Reasoning](#)

What is Data Reasoning?

The [GAISE II Data Reasoning Framework](#) shows the statistical problem-solving process Oregon students will experience as they reason with data. A key component of this process is starting with a relevant question to drive the investigation.



Why is this new domain important?

Modern mathematics programs equip every K-10 student with the data literacy skills needed to make informed decisions in our modern world. Students engaging in data reasoning will have abundant opportunities to integrate technology into their data collection, analysis, and data interpretation. These skills open doors to higher education, high-paying careers, and align with many students’ goals.

Data Science: An Exciting New Option for +1 Math Courses in Oregon

As students complete their learning of the K-10 Data Reasoning standards, they are well-positioned to go deeper with data in a +1 (third credit) math course.

What is Data Science?

Data Science is a rapidly growing field and very popular college major that primarily focuses on deep knowledge discovery through data exploration and inference. A good data scientist must possess both the statistical knowledge and computer skills that are needed for solving complex problems. ([Discover Data Science](#)) Data Science courses for high school students are [rolling out at many US high schools](#); many Oregon high schools are planning to, piloting, or already offering Data Science as a +1 math course.

Consider offering this high interest and relevant course in your district! Check out available high school data science curricula and lessons (some are free to use):

[Youcubed](#) [Bootstrap](#) [IDS](#) [CourseKata](#) [DataScience for Everyone](#)

Modernizing Math Classes with Data

How Do We Talk About It?



Someone Says . . .

“What if my child chooses the Data Science +1 and then changes their mind about their pathway. Can they do that?”

You Might Say . . .

“Yes! The intentional design of math pathways allows students the agency to choose their third and fourth year courses. A student could complete a Data Science course during 11th grade and then take Advanced Algebra/Pre-Calculus during 12th grade. A student who pursues advanced courses in multiple pathways will be well-positioned for additional mathematics courses in postsecondary education, regardless of their program of study.”

Someone Says . . .

“Can you learn Data Science without Calculus?”

You Might Say . . .

“According to the [University of Chicago Initiative](#) supporting K-12 Data Science integration, “if you’re drawing insights from data, that’s Data Science” and we don’t need Calculus for that. Start by reading the [Data Reasoning Standards for Oregon](#) which lay the foundation from K-10th grade for an engagement with Data Science. These standards were based on recommendations from the [American Statistical Association](#).”

Someone Says . . .

“What is the benefit of splitting Calculus and Data Science tracks vs. offering a higher-level familiarity with both?”

You Might Say . . .

“To be honest, we are WELL overdue offering students ANY experience with Data Science in K12 education. To “make-up” for this - Data Science is now a requirement for all high school students via the new [2021 Grade 9/10 standards](#) (equivalent to at least 0.5 credits). The [pathways](#) that follow do offer students a choice between a deeper dive into data science, quantitative reasoning or a pathway to Calculus. These ideas are grounded in research out of the [Charles Dana Center](#) and their experience working in other states to create meaningful career & college aligned pathways.

In short, the benefit is there are no bad options; just modern mathematics relevant for a career pathway that will help them develop an identity as a mathematician that sticks with them when they inevitably change their minds about that pathway.”

How is Higher Education Changing in Oregon?



Academic leadership at all seven of Oregon’s public universities have agreed to adopt the following admissions policies:

Students interested in attending a State of Oregon Public Higher Education Institution should take at least three years of high school math. The third year could be satisfied by any math course with a primary focus on concepts in algebra, calculus, data science, discrete mathematics, geometry, mathematical analysis, probability, or statistics.

Prospective students are encouraged to take a fourth math course in their senior year of high school. Those intending to study a STEM (Science Technology Engineering and Mathematics) major or another field for which calculus is required are strongly encouraged to take pre-calculus and, if possible, calculus in high school.

See Link as an Example: [Oregon State University Admission Requirements](#)

Strong Start Oregon

Students with remedial math needs take college-level math courses with appropriate supports, such as co requisite math classes rather than pre-requisite or “developmental” classes, reducing time to complete a credential.

Guided Pathways

Colleges implement comprehensive, “student-focused” redesign to streamline college offerings and increase student success.

Common Course Numbering

Common Course Numbering, or CCN, has been adopted by 20 states as of July 2022. CCN focuses on the creation of a uniform numbering convention for lower-division courses to ensure course equivalency and to facilitate transfer of course credit. Ultimately, CCN seeks to reduce the number of credits lost (sometimes referred to as “fallthrough” credits) when transferring institutions. For students, this means real savings in time and money.

See Link: [Common Course Numbering](#)





Junior and senior year + 1 math courses are key for launching students into college and career success. Well-designed +1 courses center the Oregon Math Project cornerstones, align with student goals, prepare students for workforce needs, and position students for college admissions success.

Course Design Guidelines

+1 math courses need to attend to all four of the Oregon Math Project's Cornerstones:

See a Cornerstone-Focused Syllabus: [Example Syllabus](#)

- **Focus:** Course content prepares students for (or already is) college-level math courses at the 100 level.
- **Engagement:** Course content centers mathematical modeling and is anchored in relevant and career-related contexts.
- **Pathway:** Student choice determines placement - no gatekeeping, no prerequisites - and aligns with post-secondary goals.
- **Belonging:** Student enrollment is not predictable by student demographics. Social Emotional Learning skill development is embedded and lessons are culturally relevant.

2+1 Slide Deck for Parent Night: [Making Math Meaningful for Every Student](#)

Tips for Designing +1 Courses

- **Survey your students:** design +1 options around your students' interests, goals, and post-secondary plans
- **Integrate with CTE:** align +1 courses with your [CTE programs of study](#) and your region's workforce goals
- **Partner with Higher Ed:** ensure all of your +1 pathways prepare students for (or already are) college-level mathematics, and [articulated with 100 level courses](#) .
- **Clearly communicate student options:** Clearly communicate student options: help students and families understand how your +1 courses prepare students for their future plans (examples from Ohio: [course descriptions](#), [pathways diagrams](#), and [student profiles](#))

Key Readings

- [Calculating the Odds Fact Sheet](#)
- [Calculating the Odds Report](#)
- [More university systems are moving away from using standardized tests, such as the ACT/SAT, in admissions](#)





Messaging for Students and Families

- Pick a +1 math course that:
 - Is best aligned with your goals.
 - Fits admission requirements at the higher education institutions where you will likely apply
 - Will expand and/or deepen your interest in math.
- Dual credit and CTE aligned math courses are excellent options!
- Every student should consider taking an optional fourth year of math; this is a great opportunity to experience other math pathways and earn college credit in high school.

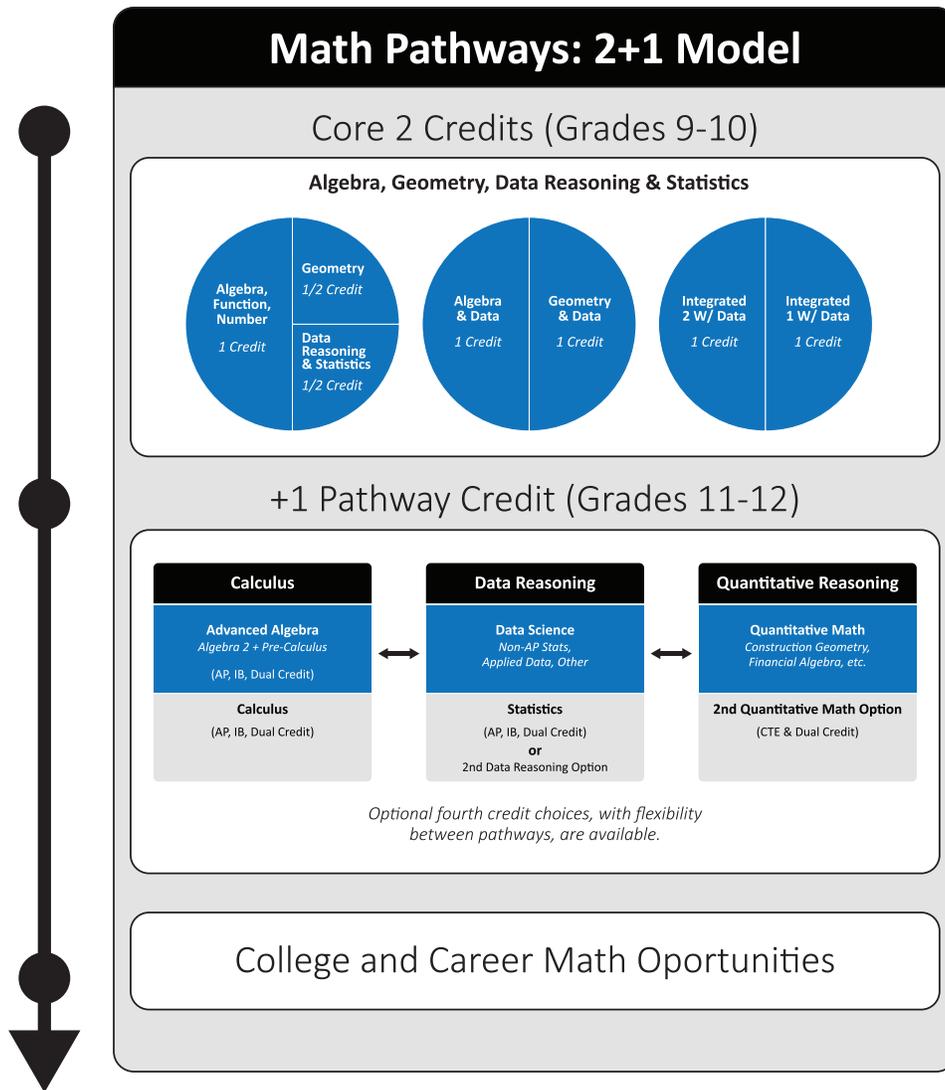
Myth Busting

- Algebra 2 is no longer an admissions requirement at Oregon public colleges and universities (starting Fall '24).
- Colleges and universities admissions departments are increasingly encouraging non-calculus math courses like data science and statistics: check current math admissions requirements at any colleges/universities you might attend.

Work Toward School-Wide Equity

- Pay attention to enrollment patterns in +1 courses. Do they reflect your school's demographics? If not, it's time for action. Track enrollment data and promote classes to students who might not otherwise take them.
- Invite students back after they graduate. Ask them how they are using the math they learned in high school and how your +1 offerings are helping them reach their goals. Make sure school staff and your current students learn from their experiences.





Tracking sounds / looks like . . .

Pathways sound / look like . . .

"We have a + 1 math course for college-bound kids."



"All our +1 math courses lead to or earn college-level math credit."

"We have applied options for our CTE kids."



"All our +1 math courses use relevant and career-related context."

Classes are homogeneous by one or more demographic group.



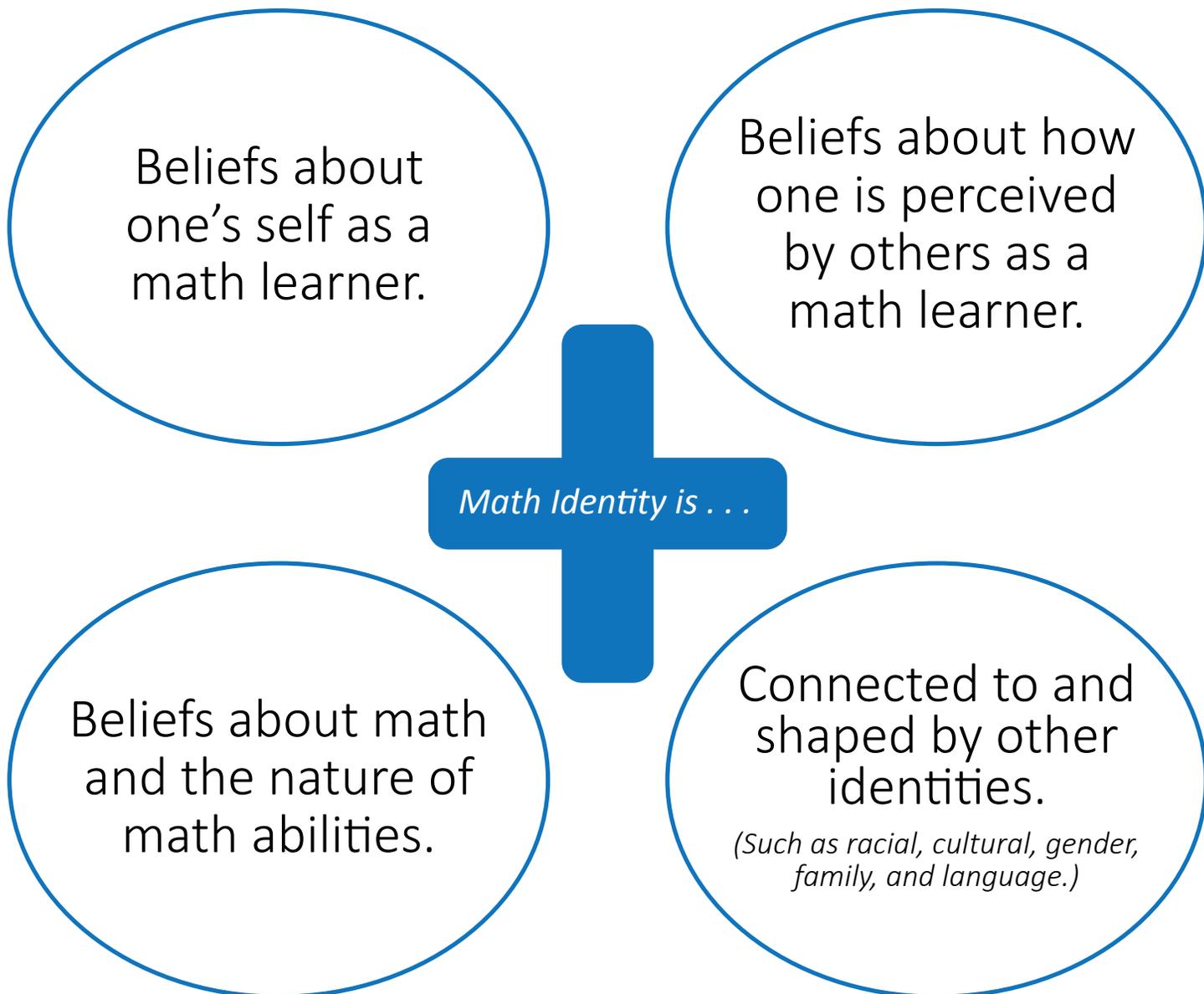
Course enrollment can not be predicted by demographics.

Teachers recommendation process for +1 enrollment.



Student choice is the only factor for placement into +1.

What is Math Identity?



Solomon, Y. (2008). Mathematical literacy: Developing identities of inclusion. Routledge.

How Do We Ensure Access for All?



Historic practices of tracking and acceleration have caused some student populations to expect particular sequences of courses. Here are helpful resources to use when you are communicating about changes to course sequences.

Curricularly . . .

Our current high school sequence of courses (Algebra course followed by Geometry and then another course in Algebra) dates back to at least 1890 as evidenced in documents from the [Committee of Ten](#) who were charged with documenting current high school practices at the turn of the 20th century.

Structurally . . .

We can trace the roots of our math sequencing practices to the early 20th century. At this time the American school system underwent a substantial shift. The rise of manufacturing, immigration, and intelligence testing were among the leading causes of these shifts. “Tracking students to situate them for specific roles in the economic hierarchy helped to replicate existing social and racial hierarchy, and to provide ‘scientific’ justification for doing so” ([Grading for Equity](#), Feldman, pp. 21-22).

These discriminatory practices of sorting students based on perceived ability and perceived potential are very much ingrained in our mathematics education system today.

Dive Into Your Data with an Equity Lens

- Who is successful in mathematics in your district? How do you measure that?
- Who is accessing advanced math courses? Does this reflect the diversity of your student population?
- How do students gain access to math courses? Are there barriers to access such as prerequisites?
- What assumptions are you making in our course placement processes? What assumptions are you making in your course placement process?

Learn More

- [Dr. Jo Boaler on Ability Grouping](#)
- [Excerpt from Catalyzing Change](#)
- [San Francisco USD Overview](#)
- [Article about SFUSD and Oakland SD pathway reforms](#)
- [Quick Facts about Math and Tracking](#)
- [Video Overview of North Clackamas](#)
- [Q&A from North Clackamas](#)
- [IB programs in support of detracking](#)

Supporting Gifted Learners

- Schools are encouraged to [Rethink Giftedness](#).
- Accelerating students as the means of meeting their TAG plans is akin to “[reckless acceleration](#),” as Angela Allen, ODE TAG Specialist names it.
- Gifted learners deserve individualized supports through Multi-tiered Systems of Support planning.

Read More: [Branching Out: Designing High School Math Pathways for Equity](#)

“Positive academic identity and agency cannot happen without deliberate work on the part of educators to address implicit bias, assumptions about student capabilities, and the ways that math traditionally reinforces privilege.”

How Do We Ensure Access for All?



Engineering for equity means designing at the margins – centering students who math education is currently not serving. In Oregon, students receiving special education services and multilingual learners have been particularly marginalized and underserved by our mathematics education system.

Designing with Special Education Students at the Center

At the District Level

- Establish a culture of “our kids” - sending the message that everyone is a teacher of special education.

At the School Level

- Choose curriculum that authentically integrates [Universal Design Principles for Learning](#)
- Design your schedule for co-teaching models that allow for collaboration between classroom teachers and special education teachers.

At the Lesson Level

- Plan lessons using strategies from [Universal Design for Learning](#)
- Increase access for students:
 - by being flexible about the physical environment, tools, means of expression, etc.
 - by allowing ample processing time - never emphasize speed in a math class.
 - with the use of assistive technology, manipulatives, visual aids, graphic organizers, and intentional brain breaks.

Rethinking Intervention

Intervention curriculum, double-dosing math, and math support classes are common practices in math education systems. The following guidance can support your district in ensuring that interventions have a positive impact:

- 1. Focus on conceptual development:** “Efficiency is the issue though. In our rush to ‘catch our students up’ we are jumping to the efficient language too early” ([Dixon, 2022](#)). Intervention time is the time to ensure students understand WHY. It is not the “shortcut” or “trick” time.
- 2. Provide a clear connection between concepts and procedures:** When you move to the HOW during intervention time, make frequent call backs and explicit connections the WHY.
- 3. Prioritize a strategic selection of content:** All math instruction should be focused on the “big ideas,” but intervention time should be even more focused on the “biggest” of these ideas and then make explicit connection to what is being studied in their grade level math course.

Designing with Multilingual Learners at the Center

At the District Level

- Establish a culture of “our kids” - sending the message that everyone is a teacher of multilingual learner.

At the School Level

- Choose curriculum that authentically integrates [SIOP Strategies](#)
- Design your schedule for co-teaching models that allow for collaboration between classroom teachers and English language development (ELD) teachers.

At the Lesson Level

- Language-rich mathematics instruction is necessary to support multilingual learners. Rather than removing text, use these strategies to support access.
 - [Teaching Academic Vocabulary](#)
 - [Reading and Understanding Written Math Problems](#)
 - [Building Background Knowledge](#)
 - [Increasing Student Language Production in the Content Area](#)
 - [Using Technology](#)



Appendix B – Oregon’s Education Equity Lens

Purpose of Oregon’s Education Equity Lens

The purpose of this equity lens¹ is to clearly articulate the shared goals we have for our state and the intentional investments we will make to reach our goal of an equitable educational system.

This equity lens helps educators and decision-makers recognize institutional and systemic barriers and discriminatory practices that have limited student success in the Oregon education system. The equity lens emphasizes underserved students, such as out of school youth, English Language Learners, and students of color with a particular focus on racial equity.

The focus of this equity lens is on race and ethnicity. This is based on an understanding that when we focus on racial disparities as a lens to consider investments for each and every student and community, we can and will generate opportunity and improvement in every area of educational practice and performance. Centering racial equity is rooted in the historical context of Oregon and is the path through which we can heal while targeting areas of action, intervention and investment.

The questions offered below can and should be adapted to ask questions regarding each of the focal groups named in the Student Success Act as being farthest away from opportunity and deserving our collective attention.

The passage of the Student Success Act directly calls upon educators and leaders across the state to act together, with a shared sense of purpose and possibility.

¹ This equity lens was first generated by the Oregon Education Investment Board in 2011 and then was adopted by the Oregon Department of Education and the State Board of Education. It is lightly adapted here to provide an equity lens that SIA applicants can apply in their planning and decision-making processes. SIA applicants can utilize a different equity lens which they are asked to provide and describe how they utilized it within the SIA application.



Questions to Support Ongoing Equity Work

The following questions should be used to examine investments and priorities:

1. Who are the racial/ethnic and underserved groups affected? What is the potential impact of the resource allocation and strategic investment to these groups?
2. Does the decision being made ignore or worsen existing disparities or produce other unintended consequences? What is the impact on eliminating the opportunity gap?
3. How does the investment or resource allocation advance student mental or behavioral health and well-being and/or increase academic achievement and address gaps in opportunity?
4. What are the barriers to more equitable outcomes? (e.g. mandated, political, emotional, financial, programmatic or managerial)
5. How have you intentionally involved stakeholders who are also members of the communities affected by the strategic investment or resource allocation? How do you validate your assessment in (1), (2) and (3)?
6. How will you modify or enhance your strategies to ensure each learner and communities' individual and cultural needs are met?
7. How are you collecting data on race, ethnicity and native language?
8. What is your commitment to professional learning for equity? What resources are you allocating for training in culturally responsive and sustaining instruction?



Beliefs

We believe that everyone has the ability to learn and that we have an ethical and moral responsibility to ensure an education system providing optimal learning environments that lead students to be prepared for their individual futures.

We believe that speaking a language other than English is an asset and that our education system must celebrate and enhance this ability alongside appropriate and culturally responsive support for English as a second language.

We believe students receiving special education services are an integral part of our educational responsibility and we must welcome the opportunity to be inclusive, make appropriate accommodations and celebrate their assets. We must directly address the over-representation of children of color in special education and the under-representation in “talented and gifted.”

We believe that the students who have previously been described as “at risk,” “underperforming,” “under-represented” or minority actually represent Oregon’s best opportunity to improve overall educational outcomes. We have many counties in rural and urban communities that already have populations of color that make up the majority. Our ability to meet the needs of this increasingly diverse population is a critical strategy for us to successfully reach our collective goals.

We believe that intentional and proven practices must be implemented to return out of school youth to the appropriate educational setting. We recognize that this will require us to challenge and change our current educational setting to be more culturally responsive, safe and attending to the significant number of elementary, middle and high school students who are currently out of school. We must make our schools places where every learner feels welcomed and a sense of belonging.

We believe that ending disparities and gaps in achievement begin in the delivery of quality early learning programs and through family and community engagement and support. This is not simply an expansion of services -- it is a recognition that we need to provide services in a way that best meets the needs of our most diverse segment of the population, 0-5 year olds and their families.

We believe that resource allocation demonstrates our priorities and values and that we demonstrate our commitment to rural communities, communities of color, English language learners and out of school youth in the ways we allocate resources and make educational investments.

We believe that communities, families, teachers and community-based organizations have unique and important solutions to improving outcomes for our students and educational systems. Our work



will only be successful if we are able to truly partner with the community, engage with respect, authentically listen -- and have the courage to share decision making, control and resources.

We believe every learner should have access to information about a broad array of career/job opportunities and apprenticeships that will show them multiple paths to employment yielding family-wage incomes, without diminishing the responsibility to ensure that each learner is prepared with the requisite skills to make choices for their future.

We believe that our community colleges and university systems have a critical role in serving our diverse populations, rural communities, English language learners and students with disabilities. Our institutions of higher education, and the P-20 system, will truly offer the best educational experience when their campus faculty, staff and students reflect this state, its growing diversity and the ability for all of these populations to be educationally successful and ultimately employed.

We believe the rich history and culture of learners is a source of pride and an asset to embrace and celebrate.

And, we believe in the importance of supporting great teaching. Research is clear that “teachers are among the most powerful influences in (student) learning.”² An equitable education system requires providing teachers with the tools and support to meet the needs of each student.

² Hattie, J. (2009), Visible learning: A synthesis of over 800 meta-analyses relating to student achievement. P. 238.



What is the Issue?

A primary task of mathematics educators is to support students in understanding the usefulness of mathematics outside of the classroom setting. Mathematical modeling is one way we can utilize math to analyze situations, create and test solutions, and make decisions based on sound reasoning. Researchers have explored how students at all grade levels can successfully engage in mathematical modeling. However, they are still exploring how teachers can engage students in authentic modeling tasks. This practice brief shares ideas in support of mathematical modeling, opportunities for students to see the usefulness of mathematics connected to their communities and lives, and emerging ideas for modeling instruction.

Why it Matters:

- **Bringing the classroom into the community**: Mathematical modeling asks students to engage with rich, complex problems. Incorporating tasks and scenarios that are directly relevant to students' lives and communities are opportunities for students to see themselves echoed in the curriculum. They are able to draw upon their varied expertise and funds of knowledge to solve problems which can lead to richer mathematical discourse. Authentic modeling tasks can also help students learn to analyze current issues using mathematics and to determine and communicate solutions to stakeholders.¹ Modeling can be a space for learning mathematics and learning about the world.
- **Opportunities to develop student agency and mathematical identities**: Modeling tasks align well with recommendations for increasing agency and identity in mathematics.² When students are actively engaged in the lesson they deepen their understanding and see themselves as mathematically capable.³ Teachers can increase opportunities for student agency and voice in the learning process by providing choice in tasks and centering modeling on contexts in which students have experience and interest. Building mathematical identities can occur through the use of relevant contexts and explicit recognition of the way students are engaged in their own and others' mathematical reasoning.
- **Building mathematical proficiency**: School mathematics is often experienced as memorization and carrying out procedures. Mathematics is more than this! It includes cultivating reasoning and justification, strategically examining problems, identifying reasonable solution paths, iterating solutions, and persevering through problems. Mathematical modeling directly connects to these elements of mathematical proficiency and asks students to experience mathematics as a cycle of initiating a problem, identifying assumptions and variables, using mathematical tools and representations, analyzing a model for given situations, and validating a model for the initial problem or refining the problem to begin the cycle again.³ Students who engage in modeling tasks begin to see mathematics as a way of reasoning and doing mathematics that involves mistakes and revision, rather than only a focus on getting an answer. Mathematical modeling actively engages students to see the usefulness of math.⁴

Big Questions:

1. How are we providing opportunities for students to engage in the cycle of mathematical modeling?
2. How is mathematical modeling different than using a mathematical representation?
3. How do we assess students' modeling process as opposed to focusing on just the model?



In Oregon & Beyond:

- **Oregon's Pilot of High School 2+1 Math Pathways:** The '2' of '2+1' is the first two years of high school mathematics that integrates modeling across all mathematical domains. The '1' is a variety of advanced mathematics courses aligned to student interest and college and career aspirations that also may integrate mathematical modeling in authentic ways.
- **Math in Real Life (MiRL) & Pilots of the First Two Years:** Oregon teachers are exploring ways to incorporate math modeling in their classes. MiRL teachers have designed projects that allow students to engage in robust mathematics and explore their communities. Other MiRL teachers have designed *mathematical modeling routines* to use with a variety of math tasks across math curricula. These routines are being shared across districts.
- **GAIMME Report and Math Modeling HUB resources:** The GAIMME report provides an in-depth exploration of the modeling cycle and ways to assess math modeling available via COMAP.³ The Math Modeling Hub is an online community with K-16 modeling tasks.

Future Steps:

- **Incorporate routines and build norms for participation in each step of the modeling process:** The modeling cycle is complex and can be overwhelming to do immediately with students. Incorporate instructional routines that focus on specific elements of the modeling cycle can support both teachers and students to get started with modeling. Two routines for mathematics modeling developed by Oregon teachers ask students to (1) consider assumptions, variables, and parameters that lead to a model and (2) analyze a model and consider its validity by coordinating a justification with assumptions and parameters. Teachers have found that these routines can be used with content more familiar to teachers and students before launching an authentic modeling task. Preparing for each step of the modeling cycle by organizing resources, anticipating student methods, and developing discussion questions is essential to supporting students modeling.²
- **Modifying task to become modeling tasks:** Typical mathematics tasks in textbooks can often be modified to become modeling tasks by removing scaffolds or steps in problems.⁶ To support students' engagement in modeling ensure tasks involve communicating with others, developing strategies, asking good questions, and persevering when solutions are not obvious.
- **Connect to community and student interests:** Math is everywhere. Using the local newspaper and community issues, especially on topics of interests to students or where they spend their time outside of school, is a great source for modeling tasks.¹ Provide opportunities for students to do research into questions of interest. Use modeling as a way to develop, analyze, and justify solutions. Encourage and support students to bring those solutions to the appropriate stakeholders.

¹Aguirre, Anhalt, Cortez, Turner, & Simic-Muller. (2019). Engaging Teachers in the Powerful Combination of Mathematical Modeling and Social Justice: The Flint Water Task. *Mathematics Teacher Educator*, 7(2), 7. <https://doi.org/10.5951/mathteaceduc.7.2.0007>

²Hernández, M. L., Levy, R., Felton-Koestler, M. D., & Zbiek, R. M. (2017). Mathematical Modeling in the High School Curriculum. *The Mathematics Teacher*, 110(5), 336. <https://doi.org/10.5951/mathteacher.110.5.0336>

³Horn, I. S. (2017). *Motivated: Designing math classrooms where students want to join in*. Portsmouth, NH: Heinemann.

⁴Garfunkel, S., & Montgomery, M. (2016). GAIMME: Guidelines for assessment & instruction in mathematical modeling education.

⁵Tran, D., & Dougherty, B. J. (2014). Authenticity of Mathematical Modeling. *The Mathematics Teacher*, 107(9), 672. <https://doi.org/10.5951/mathteacher.107.9.0672>

⁶Wendt, T., & Murphy, K. (2016). Integrating Modeling Steps into the High School Curriculum. *The Mathematics Teacher*, 109(5), 374. <https://doi.org/10.5951/mathteacher.109.5.0374>

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What is the Issue?

Classroom research has established that all students learn by participating in meaningful discourse, and many teachers are changing the ways they teach to incorporate more student reasoning, ideas, and questions. Unfortunately, much of student talk in math classrooms is often limited to students providing short responses to teachers' questions. This practice brief explores how robust discourse can positively impact student learning and identity in math and it details steps educators can take to incorporate more meaningful discourse in their classrooms.

Classroom Discourse

The gestures, speech and written text used by teachers and students to communicate. These depend on the social relationships and communication system cultivated by teachers and students.¹

Why it Matters:

- **Affords deeper understanding:** When classroom discourse asks students to justify their own thinking and make sense of the thinking of others, learning becomes a collaborative process in which students are able to make connections to mathematical concepts and gain insight into their own (mis)understandings.² Students develop the skills to support their thinking with examples, counterexamples, and logic, which are critical to mathematical proficiency. Constructing viable arguments and critiquing the reasoning of others (Math Practice #3, Common Core State Standards) is an essential part of mathematical discourse.³
- **Positions everyone as a knower and doer of math:** If the ideas and voices of only a select group of students are recognized as mathematically correct or useful, it may position other students as incapable or unworthy of learning mathematics. However, research demonstrates there are certain discourse moves which help to position students as knowers and doers of mathematics, particularly English Language Learners.⁴ For example, when teachers “revoice” student ideas or ask another student to “repeat or rephrase” to highlight key mathematical thinking, students are recognized by their peers as having valuable ideas.⁵ Using tasks that have multiple entry points and solution methods and that require students to work collaboratively provide opportunities for students to see themselves and each other as mathematically competent.⁶ When students’ identities are grounded in being mathematically capable, they are more comfortable sharing their own ideas, questioning others, and taking on the cognitive load of tasks and problem solving.
- **Provides opportunities for formative assessment:** By having students voice their thinking, rephrase peers’ thinking, or add on with reasoning by agreeing or disagreeing to peers’ thinking, teachers can assess understanding of concepts and gain insight into students’ methods and reasoning.⁵ Class discussions allow for frequent, formative, informal assessment, to gauge reasoning and comprehension. Activities where students capture their thinking through reflections can serve as both a check-in and an artifact of student progress.

Big Questions:

1. Do students feel they have the authority and responsibility to ask questions and drive discussions?
2. How can all student ideas be seen as valuable contributions?
3. What instructional opportunities engage students in meaningful discourse that deepens their understanding of mathematics?



Future Steps:

- **Rough draft talk:** Create a space where students share their initial ideas (i.e., rough drafts) without being evaluated. Instead, have students ask questions to help clarify ideas and give them time to revise their thinking before sharing ideas as a final draft. When students can share without the fear of being wrong and have the opportunity to revise their thinking, they develop the confidence to take intellectual risks and the understanding that learning/doing mathematics is an iterative process.⁷
- **Model the discourse you expect:** Since this type of discourse may be different from students' previous experiences, teachers must intentionally support the discourse practices expected from students.¹ This includes providing sentence stems, asking open-ended questions, using appropriate terminology, and providing enough time for students to think about and revise their responses.⁸
- **Act on opportunities:** In addition to incorporating high cognitive demand tasks which provide opportunities to leverage student thinking⁹, teachers can also modify current tasks to incorporate more discourse by considering question that ask students to make their thinking visible.¹⁰ Talk moves such as revoicing, restating, agree/disagree with reasoning, adding on, and wait time are discourse practices that can be used on a regular basis.⁵ Additionally, look for ways to structure activities for students to work collaboratively and capture their in-process thinking using technology.
- **Trust the process:** Changing classroom discourse norms takes time for both teachers and students. Making explicit new discourse routines and behaviors helps to establish norms as does practice with authentic tasks that elicit reasoning.⁹ Establishing and maintaining robust discourse norms requires persistence especially when students face challenging content or shifting norms across courses.¹¹

In Oregon & Beyond:

- **Curriculum for developing norms for discourse:** District that utilize curricula that embed opportunities to build routinized structures for classroom discourse are providing teachers with resources and opportunities to build math classroom discourse. Curricula such as CPM¹⁶, New Visions¹⁴, and Illustrative Math¹⁵ emphasize communication and justification as students collaboratively solve tasks. They also embed instructional routines for regular use to build classroom discourse norms.
- **Bend La Pine School District:** Teachers are encouraged to regularly use classroom discourse practices as a part of their instruction. To work on math discourse department wide, teachers engage in Studio Cycles¹² where they lesson plan and make teaching public via observation multiple times a year.
- **Conferences:** Teacher professional development opportunities around building mathematical classroom discourse include:
 - Teachers Development Group Leadership Seminar,
 - Oregon Math Leaders Conference
- **Integrating Effective Teaching Practices¹³:** A brief report that explains three teacher moves to use in establishing mathematical discourse with students and provides tips for structuring class time effectively.

¹Cazden, C. (2001). *Classroom discourse: The language of teaching and learning* (2nd ed.). Portsmouth: Heinemann.

²Staples, M., & Colonis, M. M. (2007). Making the most of mathematical discussions. *Mathematics Teacher*, 101(4), 257-261.

³Standards for mathematical practice | Common Core State Standards Initiative. (n.d.). Retrieved September 5, 2019, from <http://www.corestandards.org/Math/Practice/>

⁴Turner, E., Dominguez, H., & Maldonado, L. (2013). English learners' participation in mathematical discussion: Shifting positionings and dynamic identities. *Journal for Research in Mathematics Education*, 44(1), 199. <https://doi.org/10.5951/jresmetheduc.44.1.0199>

⁵Chapin, S. H., O'Connor, C., & Canavan Anderson, N. (2009). *Classroom discussions: Using math talk to help students learn. Grades 1-6, 2nd Edition*. Sausalito, CA: Math Solutions Publications.

⁶Horn, I. S. (2017). *Motivated: Designing math classrooms where students want to join in*. Portsmouth, NH: Heinemann.

⁷Jansen, A. (2020). *Rough draft math: Revisiting to learn*. Portland, ME: Stenhouse Publishers.

⁸<https://educationcloset.com/wp-content/uploads/2015/09/AccountableTalk-Stems.pdf>

⁹Leatham, K. R., Peterson, B. E., Stockero, S. L., & Zoest, L. R. V. (2015). Conceptualizing mathematically significant pedagogical opportunities to build on student thinking. *Journal for Research in Mathematics Education*, 46(1), 88. <https://doi.org/10.5951/jresmetheduc.46.1.0088>

¹⁰National Council of Teachers of Mathematics (2014). *Principles to actions: Ensuring mathematical success for all*. Reston, VA: Author.

¹¹Hufferd-Ackles, K., Fuson, K. C., & Sherin, M. G. (2004). Describing levels and components of a math-talk learning community. *Journal for Research in Mathematics Education*, 35(2), 81. <https://doi.org/10.2307/30034933>

¹²<https://www.teachersdg.org/services/>

¹³<https://tinyurl.com/EffectiveTeachingPractices>

¹⁴<https://curriculum.newvisions.org/math/course/getting-started/instructional-routines/>

¹⁵<https://www.illustrativemathematics.org/curriculum/>

¹⁶<https://cpm.org/>

Oregon Math Project

Practice Brief: Tracking



Elyssa Stoddard, Megan Brunner, & Rebekah Elliott, Oregon State University

What is the Issue?

Tracking, also known as ability grouping students into particular courses, has been commonplace in K-12 schools and particularly in mathematics classrooms since the 1920s. While some argue that tracking allows for more targeted instruction based on student ability and need, research has demonstrated that tracking often results in inequitable teaching and learning for students. Certainly, students have different needs and abilities that need to be attended to, however tracking isn't the answer given the persistent inequalities that result from it. This practice brief discusses the impact tracking has on students and describes alternatives for teachers and schools.

Why it Matters:

- **Tracking is inequitable**: Students minoritized in schools are placed in lower track courses at higher rates than their white peers.¹ This contributes to what opportunities students have to learn and how they see themselves as capable learners. This contributes to the inequalities documented in system level assessments.
- **Impact on student learning**: Lower track classes frequently focus on below grade-level content and over-reliance on procedures thus not preparing students to advance in mathematics. These courses are often taught by the least experienced teacher or by teachers with minimal certification or licensing. One study found that students who were given grade-appropriate assignments met the demands of those assignments the majority of the time regardless of the track where they were enrolled.² Additionally, students who began the year testing behind their peers demonstrated more than 7 months of academic gains when they had greater access to grade-appropriate assignments.
- **Labels send a message**: How courses are labeled (i.e. advanced, college preparatory, regular, foundational) can perpetuate status issues among students.¹ Status based on perceived academic, social, or other capabilities, when unattended to, can perpetuate biases and systemic inequality. Course labels often send a message that “advanced courses” are somehow more important than applied courses such as those in career and technical education departments.
- **Students see the inequity of tracking**: Research on detracking documents that students are aware of the inequity of being tracked in courses. Students in one study expressed how easy it was to be moved to a low track course yet widely experienced great difficulty to shift into a high track course.³ They also recognized that some teachers give more attention and effort to higher track courses than to lower track courses and thus students received less attention and quality of instruction.³
- **Teacher tracking hinders system coherence**: Teachers are also tracked, meaning they teach a limited scope of courses or are assigned courses with particular course titles (regular, foundational, etc.). This limits teachers' professional growth and the school's or department's instructional coherence.⁷



Big Questions:

1. What process does your school use to assign students to a course?
2. What is the impact of tracking on students' status, course taking, and access to grade level math in your school/district?
3. How can students' diverse needs and abilities be met and challenged in a heterogeneous setting?
4. Who needs to be a part of conversations on tracking?

In Oregon & Beyond:

- **Oregon Schools**: Districts are exploring ways to grade level mathematics in every grade.² For example, for those entering a trimester system, teachers may offer first trimester courses so that all students, even those who were tracked to a “lower level” course, can enter into “grade level” mathematics in trimester two and three. First trimester content provides robust opportunities to work on procedural fluency and standards for math practice such as modeling.
- **San Francisco Unified School District**: Mathematics courses were de-tracked started in middle school with students completing the same core course sequence during grades 6 through 9, including Algebra I. Afterwards, course options allow for students to choose the path of rigorous mathematics they wish to pursue.⁶
- **Look to the National Council of Teachers of Mathematics**: Read their recent publication *Catalyzing Change*.⁷

Future Steps:

- **Create supportive routines and structures that attend to grade level learning and status when detracking courses and schools**: When systems change from traditional ability grouping to detracked courses, teachers need routines and structures built within courses to support each and every student to learn grade level content and to establish norms for addressing status. Co-requisite courses that support student success with grade-level content must attend to problem solving and concepts, not just procedures.
- **Create multidimensional courses**: Utilize mathematical tasks that have multiple entry points and solution paths. Often these tasks ask students to work together in groups.⁴ This way all students can participate and find success, while also seeing that success in mathematics is not just getting an answer. Mathematics involves communicating with others, developing strategies, asking good questions, and persevering when solutions are not obvious.
- **Work to change community beliefs**: Teachers, students, and community members need to believe that all students are mathematically capable if detracking efforts are going to be sustainable and successful.⁵ To change beliefs, teachers should be provided with supports such as common planning time, professional development, and curricular resources. Students previously in low track courses should be supported academically so they feel capable of taking on detracked courses. All students should feel supported and understand that they are capable of being successful in mathematics.

¹ Wells, C. L. (2018). Understanding issues associated with tracking students in mathematics education. *Journal of Mathematics Education*, 11(2), 68–84.

² TNTP. (2018). The opportunity myth: What students can show us about how school is letting them down - And how to fix it. Brooklyn, NY: TNTP. Retrieved from <https://tntp.org/publications/view/student-experiences/the-opportunity-myth>

³ Yonezawa, S., & Jones, M. (2006). Students' perspectives on tracking and detracking. *Theory into Practice*, 45(1), 15–23. Retrieved from JSTOR.

⁴ Boaler, J. (2006). How a detracked mathematics approach promoted respect, responsibility, and high achievement. *Theory Into Practice*, 45(1), 40–46.

⁵ Rubin, B. C. (2006). Tracking and detracking: Debates, evidence, and best practices for a heterogeneous world. *Theory Into Practice*, 45(1), 4–14.

⁶ San Francisco Unified School District Mathematics Department. (n.d.). Retrieved September 16, 2019, from SFUSD Mathematics website: <http://www.sfusdmath.org/>

⁷ *Catalyzing Change - National Council of Teachers of Mathematics*. (n.d.). Retrieved August 19, 2019, from <https://www.nctm.org/catalyzing/>

What is the Issue?

In education, we often hear the word “equity” used in conversations about programs and in policy. Knowing what is meant by equity and attending to who is served and more importantly who is not served by our programs and policies is complex and not typically central in our discussions. The lack of a shared definition of equity and attention to who is served in policies and programs can result in perpetuating the status quo. This practice brief introduces a commonly used framing of equity in mathematics education and provides ideas for how teachers, administrators, and families can work together to improve instruction towards more equitable ends.

Equity

The inability to predict mathematics achievement and participation based solely on student characteristics such as race, class, ethnicity, sex, beliefs, and proficiency in the dominant language.¹

Why it Matters:

- **Access:** The first step into making schooling more equitable focuses on students’ access to grade level opportunities for learning. Without access to resources and opportunities, students can be positioned from a deficit perspective instead of acknowledging that students will have different needs in the classroom. When planning, enacting, and assessing a lesson, we need to provide equitable access to materials, people, content, and a community that supports the learning of all students. However, providing access to opportunities is not enough.²
- **Achievement:** The definition of equity presented above centers achievement as a key piece for measuring equitable schooling. That is, unless we teach our students in ways that support them to show what they know on assessments that determine their futures as well as empower them to use mathematics as a critical tool in their lives and communities, we have not prepared them to succeed in a society that values mathematics. We need to prepare students to “play the game” in order to “change the game.” This means that we must support students from non-dominant communities’ access to math *and* math achievement so they may pursue STEM and change STEM culture.²
- **Power:** Power dynamics shape teaching and learning mathematics. These dynamics can be seen through questions such as, “whose voice is heard in the classroom?”, “who is able to author mathematical ideas?”, “where is mathematical authority located?”, and even regarding how mathematics is seen as useful by students. Students need to experience their power as mathematical thinkers and do-ers, thus requiring us to decenter our own thinking and center theirs.²
- **Identity:** Studies have shown that students who hold positive mathematical identities are more likely to succeed in math and continue in the field. A linchpin in the development of positive mathematical identities is the classroom learning environment. Supporting students’ development of positive math identities is intentional work that comes through planning, enactment, and assessment of a learning segment. The learning environment must welcome and draw upon students’ cultures, communities, and identities to learn content just as the design of curricular tasks must recognize the valid and valuable³ mathematical activity students bring from their everyday lives.²



Big Questions:

1. How are our expectations of students shaped by biases and perspectives on learning that we bring to the math classroom?
2. Is each and every student receiving a high-quality education with equitable opportunities to participate in learning?
3. How are math classes empowering students to meaningfully participate in their future and community and to see themselves as

In Oregon & Beyond:

- **Escondido Union High School District**¹¹: A common vision of equitable instruction was developed by EUHSD teachers and leaders to guide their work in creating an equitable math program.
- **Conferences**: Many conferences for teachers include sessions specific to equity in math education or are equity-focused as a whole. Opportunities for professional learning include:
 - **TODOS**
 - **Teachers Development Group Leadership Seminar**
- **Resources for reflecting on practice**: Teachers can use tools such as the TRU Framework⁸ to critically reflect on their practice, or apps like EQUIP¹⁰ to set goals and capture evidence of teaching.

Future Steps:

- **Set norms for interaction that attend to status issues**: Regularly position students as competent, recognizing their participation in mathematical activity publicly. Ask students to engage in groupworthy tasks, where all members of a group are needed to contribute to the solution. Structuring peer discussions can support deeper connections to the math and build positive classroom relationships.⁴
- **Consider assessment policies used in class**: Provide opportunities for students to revise reasoning and demonstrate understanding in multiple forms over the course of a unit in order to reflect the iterative nature of mathematics.⁵ Utilizing a variety of assessments that integrate student choice and self-assessment can build agency and connect mathematics with student interests.
- **Incorporating questioning into curriculum**: Fore-fronting student thinking and discourse provides a way to meet students where they are and allow *their* ideas to drive discussion. Asking questions that elicit mathematical reasoning allows students opportunities to explain their thinking, learn to question each other's reasoning, and build on each other's ideas.⁶
- **Connect classrooms with the community**: Our students live and interact in complex environments, and we do them a disservice when we expect them to leave their lives at the door. Pose problems around student or community interests and empower your students to analyze scenarios and propose solutions using mathematics as a critical tool.⁷
- **Engage in critical conversations**: Learning how our commitments to equity connect to our instruction is challenging. It requires hard work, critical reflection, and accountability to goals for improvement. It requires reflecting on our biases and the ways they shape instruction. Observing colleagues and reflecting on our instruction can support growth.⁸ Collective, sustained focus across a system is needed to move toward equitable and inclusive mathematics education.⁹

¹Gutiérrez, R. (2002). Enabling the practice of mathematics teachers in context: Toward a new equity research agenda. *Mathematical Thinking and Learning*, 4(2–3), 145–187. https://doi.org/10.1207/S15327833MTL04023_4

²Gutiérrez, R. (2009). Framing equity: Helping students “play the game” and “change the game.” *Teaching for Excellence and Equity in Mathematics*, 1(1), 5–7.

³Moll, L. C., Amanti, C., Neff, D., & Gonzalez, N. (1992). Funds of knowledge for teaching: Using a qualitative approach to connect homes and classrooms. *Theory into Practice*, 31(2), 132–141.

⁴Nasir, N. S., Cabana, C., Shreve, B., Woodbury, E., & Louie, N. (2014). *Mathematics for equity: A framework for successful practice*. Teachers College Press.

⁵Kalinec-Craig, C. (2017). The rights of the learner: A framework for promoting equity through formative assessment in mathematics education. *Democracy & Education*, 25(2), 1–11.

⁶Staples, M., & Colonis, M. M. (2007). Making the most of mathematical discussions. *Mathematics Teacher*, 101(4), 257–261.

⁷Gutstein, E. (2016). “Our issues, our people—math as our weapon”: Critical mathematics in a Chicago neighborhood high school. *Journal for Research in Mathematics Education*, 47(5), 454–504.

⁸Schoenfeld, A. H., & The Teaching for Robust Understanding Project. (2016). *The Teaching for Robust Understanding (TRU) observation guide for mathematics: A tool for teachers, coaches, administrators, and professional learning communities*. Retrieved from <http://truframework.org>

⁹Gutiérrez, R. (2016). Strategies for creative insubordination in mathematics teaching. *Teaching for Excellence and Equity in Mathematics*, 7(1), 52–60.

¹⁰EQUIP App. (n.d.). Retrieved October 9, 2019, from <https://www.equip.ninja/>

¹¹https://www.nctm.org/uploadedFiles/Standards_and_Positions/Escondido-Union-High-School-A-Systemic-Approach-to-Change.pdf

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OREGON MATH PROJECT

Meaningful Math for Every Student

For more information on the High School Math Pathways Project, email or visit the ODE website.

ODE.MathProject@ode.oregon.gov

www.oregon.gov





NCSD MATHEMATICS RESEARCH RESOURCES:

Español *Русский* *Việt* *中文*
Reviewing and Revising NCSD's Middle School Math Program



****ALL UNDERLINED TEXT LINKS TO OTHER SITES****

Research	NCSD Work	Instructional Shifts
<p>Articles about math education</p> <ul style="list-style-type: none"> • Forbes, Dec. 2020 • USA Today, Feb. 2020 • Edutopia, Aug. 2019 • NCTM, March 2018 <p>Research & Position Papers</p> <ul style="list-style-type: none"> • YouCubed Study • Student Experience Network Study • National Council of Teachers of Mathematics • National Education Policy Center • Research Overview Statement • Research References • Oregon Math Project: Tracking Brief • Oregon Math Project: Equity Brief <p>Case Study: San Francisco</p> <ul style="list-style-type: none"> • San Francisco USD Overview 	<p style="text-align: center;"><u>June 2021 Math Update</u> <u>Video Overview</u></p> <p style="text-align: center;"><u>Math Considerations</u></p> <p style="text-align: center;"><u>Rationale and Frequently Asked Questions</u></p> <p style="text-align: center;">Oregon Department of Education Information</p> <ul style="list-style-type: none"> • <u>Presentation to NCSD teachers (video)</u> • <u>ODE Mathematics Website</u> 	<p>Videos</p> <ul style="list-style-type: none"> • Five Principles of Extraordinary Math Teaching • Rethinking Giftedness • Dr. Jo Boaler on Ability Grouping • Understanding “Old” and “New” Mathematics • Rich Tasks: Square Counting video <p>Sample Math Lessons</p> <ul style="list-style-type: none"> • Number Talk • Using a Worked Example • Multiple Ways to Solve a Problem

Additional Link to Restructuring Math Pathways Research

<p>Acceleration and Course Pathway Restructuring (i.e. Detracking)</p>	<ul style="list-style-type: none"> • Kansas Standards for Mathematics Acceleration Task Force <ul style="list-style-type: none"> ◦ RE-THINKING MATHEMATICS ACCELERATION PRACTICES Kansas State Department of Education, White Paper October 2015 (Updated January 2019) • NCSM Position paper on Detracking (Spring 2020) • Mathematics Learning: A Journey, Not a Sprint • Oakland and San Francisco create course pathways through Common Core Mathematics (Daro, April 2014) • The Case against Acceleration (Kaplinsky) • Education Next: The Detracking Movement • Successful Detracking in Middle and Senior High Schools. - Foundational research
<p>Calculus Burnout</p>	<ul style="list-style-type: none"> • INSIGHTS from the MAA National Study of College Calculus: Students who succeed in high school calculus become discouraged and quit in college. Why? (Bressoud, 2015) • Putting Brakes on the Rush to AP Calculus
<p>Remediation</p>	<ul style="list-style-type: none"> • Remediation won't help students catch up - here's what will. • Restarting School - 2020-21
<p>School District Example: San Francisco USD Mathematics</p>	<ul style="list-style-type: none"> • Math 6-12 FAQ • Middle School Math FAQ • From Middle School to High School • Quick Facts about Math and Tracking



Math Pathways

Tammy O'Neill, Dianna Ngai, and Luke Weinbrecht

Tonight We Will Share With You:

How the North Clackamas School District K-12 math programming is aligned with:

- NCSD Strategic Plan
- NCSD Equity Lens
- Oregon state standards
- Current research
- College and career readiness

As well as the *why, how, and what* behind the shifts nationally and locally in courses, content, and practices.



We prepare each student through engagement, effective instruction, empowerment, and skill development in order to succeed in life and career.

- Strengthen and improve instructional and assessment practices that lead to meaningful academic and experiential learning for each student.
- Ensure that modes and delivery of teaching and learning are varied and responsive to students' learning needs.
- Provide frequent actionable feedback to students that leads to growth and proficiency.
- Strengthen and continue to provide opportunities for student learning through academics, arts, and extracurricular activities.
- Support the mental health and well-being of each student.
- Develop a district-wide system in which all students graduate with a post-secondary plan and pathway for success.
- Provide safe and flexible learning environments to encourage collaboration and innovation.

EVERY Student is a Mathematician

Coherent K-12 Math Programming that allows EVERY student to access to:

- Rigorous pathways that prepare them for multiple post-secondary pathways.
- Instruction focused on the development of deep conceptual understanding and procedural skills that allow for procedural fluency.

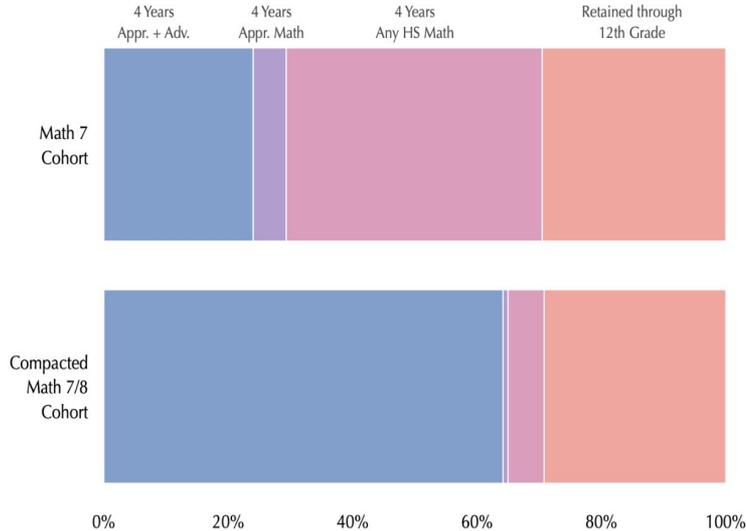
Meaningful access to four years of challenging high school math courses that develop EVERY student's:

- Mathematical mindset
- Ability to think critically and flexibly
- Collaborative skills

Course pathways that include the ability for EVERY student to access college credit.

222

By 6th grade, math pathways limited post secondary opportunities for most students. Too few students were failing to access 4 years of math and even fewer enrolled in advanced coursework.



- With the middle school two pathway system, one third of students did not take 4 years of math, *and*
- Only 63% of students in compacted math ended up taking four years of high school math that included an advanced course.

223

2019-2020

2022-2023

	12th grade students enrolled in math
RPHS	40.54%
ANHS	58.2%
MHS	43.8%
CHS	60.1%

	% of 12th Graders Enrolled in Calculus
RPHS	8.1% (21/259)
ANHS	7.8% (23/294)
CHS	18.3% (52/283)
MHS	6.7% (14/208)
NCSD Total Enrolled:	10.5% (110/1044)
NCSD Students who passed the AP Calculus Exam	.7% (8 of 31 of those registered)

224

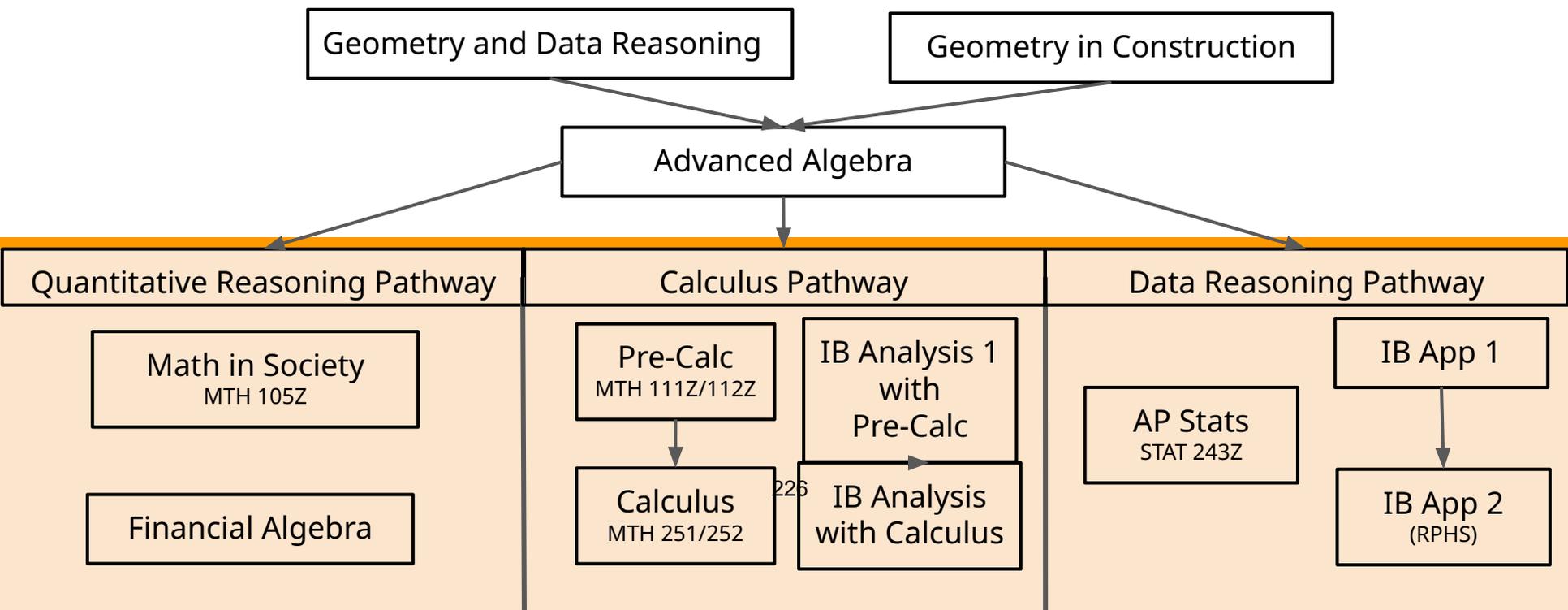
2023-2024

9th Graders

10th Graders

	Total Enrollment	Geometry & Data Reasoning	Advanced Algebra	Pre-Calculus/ IB Analysis SL1	Calculus/ IB Analysis SL2
American Indian / Alaskan Native	0.48%	0.34%	0.53%	0.00%	0.00%
Asian	12.60%	14.21%	13.17%	21.75%	30.15%
Black / African American	2.89%	2.88%	2.90%	1.62%	1.47%
Hispanic	21.18%	21.32%	23.00%	13.31%	11.76%
Native Hawaiian / Other Pacific	0.53%	0.93%	0.26%	0.65%	0.00%
Two or More	8.18%	9.39%	7.99%	6.82%	7.35%
White	54.18%	50.93%	²²⁵ 52.15%	55.84%	49.26%

Math Pathways for All: “The 2 + 1 course pathway model provides the structure for [a more modern and equitable system of mathematics]. It begins with two credits of core content for all students, and third credit pathway options that align to student interests and goals.” ([Oregon Math Project, 2013](#))



New Oregon Math Standards (2021)

Algebra 1

Linear Equations, Inequalities, and Systems
Categorical and Quantitative Data
Functions: Quadratic & Exponential

Geometry

Transformations
Congruence and Similarity
Right Triangle Trigonometry
Solid Geometry

Algebra 2

Functions: Quadratic & Exponential
Polynomials
Statistics
Rational and Radical
Trigonometric

227

8th Grade Math

Geometry/Data Reasoning

Advanced Algebra

Pre-Calc

Myth 1

Students learn more/better in homogeneous groups.

What the Research Says

A meta-analysis demonstrated that students in detracked groups performed better academically than tracked peers (Rui, 2009).

A multi-level modeling study found that students in “lower” tracks are 60% more likely to dropout of high school (controlling for other factors) (Werblow et al, 2013).

[Boaler & Foster \(2021\)](#) found 65% of students who were enrolled in accelerated classes were required to repeat the classes when they went to high school.

[High School Math Pathways Project Communication Toolkit \(Oregon Math Project, 2023\)](#)

“Deeply problematic myths are at the root of our inequitable mathematics education system... these must be replaced with research-based knowledge about teaching and learning.”

Myth 2

Students, especially those tracked into low skilled groups, feel more positive about themselves when they are in homogeneous groups.

What the Research Says

Tracking creates a self-fulfilling prophecy of behavior in students and plays an important role in defining the type of person that they believe themselves to be (Ansalone, 2009).

Tracking has a negative impact on the overall attitude and self-concept of students in lower tracks (Sukhnandan & Lee, 1999).

Student self-concept is healthier in untracked schools (Ireson and Hallam, 1999).

228

"Shifting deficit beliefs is often challenging as people.. view these perspectives as normal rather than developed over time through stereotypical, and then institutionalized, cultural narratives."

Myth 3

Placement processes accurately and fairly reflect past achievement and future potential.

What the Research Says

The result of tracking is a reproduction of social class and unequal access to resources (Battey, 2013).

Domina (2014) used multi-level modeling to discover that even when students have similar skills, characteristics such as race and class can influence MS math course placement.

With a rank-based regression discontinuity design, Card & Giuliano (2016) found that putting non-gifted students in gifted courses led to significant gains in achievement.

Myth 4

Teaching is easier when students are in homogeneous groups.

What the Research Says

Tracking creates a self-fulfilling prophecy of behavior in students and plays an important role in defining the type of person that they believe themselves to be (Ansalone, 2009).

229

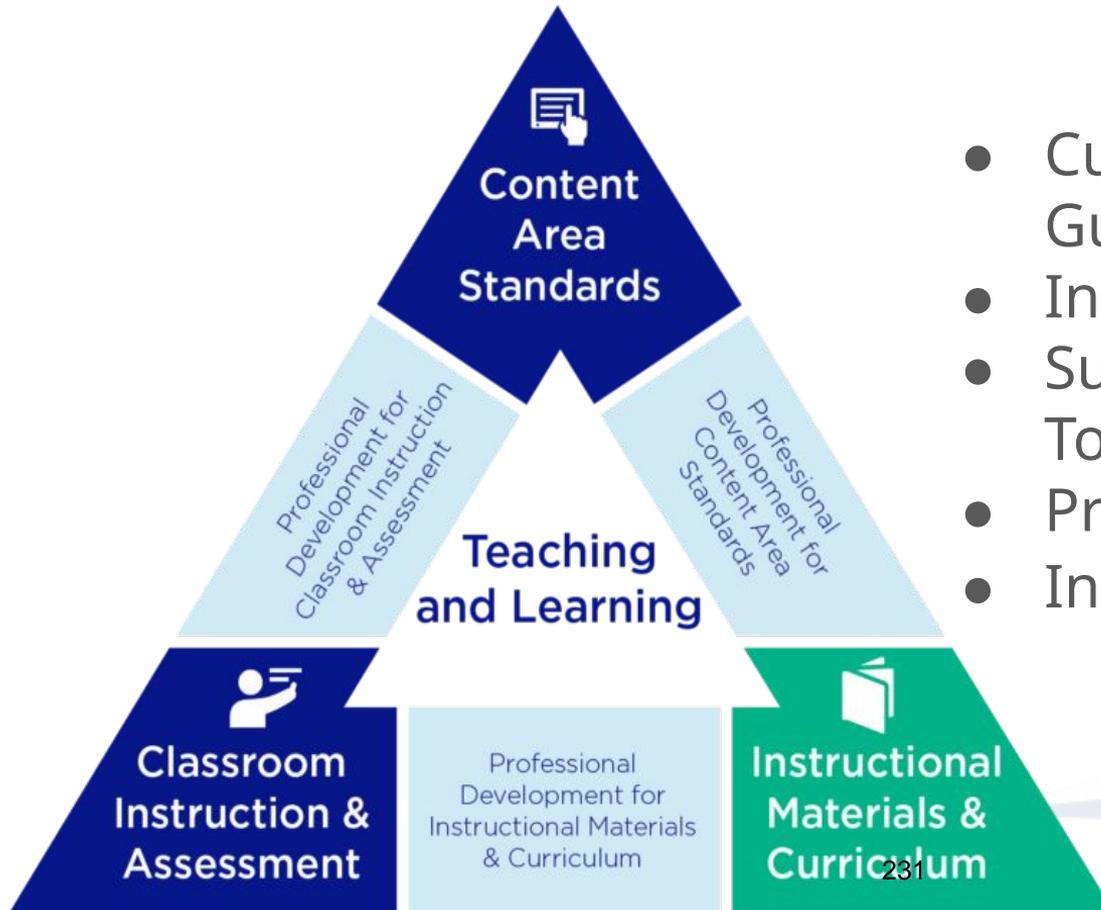
Instead, complex instruction and other heterogeneous grouping instructional strategies can promote teacher success and satisfaction ([Horn, 2006](#)).

Acceleration v. Remediation

Garrity found evidence to suggest that removing tracking and teaching all students as if they were high achievers did not "drag down" high achievers, but rather pulled up the performance of average students when math classes were detracked."

Oakes reported on research that found previously successful students seemed to do every bit as well in detracked settings as they had in tracked settings.

[NCTM position paper](#)



- Curriculum Materials and Guidelines
- Instructional Guidance
- Supplemental Learning Tools
- Professional Learning
- Instructional Leadership

Math Curriculum Adoption

Piloting 2 Elementary and 2 Secondary curricula

Key Features

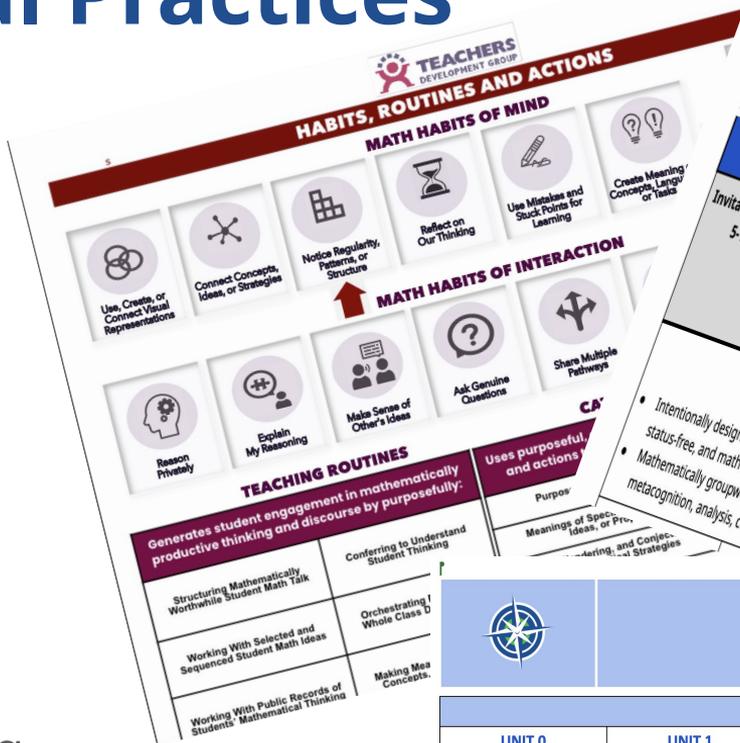
- Coherence across K-12
- Rich mathematically challenging tasks
- Centers student thinking and collaboration
- Rigorous with depth to create thinkers and mathematicians.

Research suggests that mathematical tasks which are group worthy and rich with detail are best suited for engaging students of all ability levels.



Instructional Practices

Ambitious math teaching describes inclusive moves that promote students of all abilities, racial, ethnic, and class backgrounds in understanding mathematical ideas, participating in discourse, and solving authentic problems.



North Clackamas Secondary Mathematics Instructional Model

Through the core curriculum, all students have equitable access to comprehensive, rigorous, standard-based grade-level mathematics instruction. Students have time and access to demonstrate their own understanding developed through engagement in both individual and collective sense-making.

Instructional Model

Invitation into the Math
5-10 minutes

Start with an invitation into the math through a contextual, familiar, or previously reasoned around problem(s). This invitation allows for all students to bring their own reasoning, thinking, and lived experience into the classroom through noticing, wondering, and reasoning. Formal mathematical thinking will occur throughout the lesson and/or unit as students develop their thinking.

Multiple Cycles of Inquiry
MS: 40-45 minutes HS: 60-65 minutes

- Intentionally designed student collaboration through cycles of inquiry allow for consistently equitable status-free, and mathematically productive student learning.
- Mathematically groupworthy tasks provide authentic context with metacognition, analysis, comparison, and definition.

NCSD Math 8 Curriculum Guide

Semester 1				
UNIT 0 (~5 days)	UNIT 1 (~ 20 days)	UNIT 2 (~ 15-16 days)	UNIT 3 (~ 16 days)	UNIT 4 (~ 18-20 days)
Mathematical Mindset	Rigid Transformations and Congruence	Dilations, Similarity, and Introducing Slope	Linear Relationships / Proportional and Linear Relationships	Linear Equations and Linear Systems

Semester 2				
UNIT 5 (~ 25- days)	UNIT 6 (~ 13 days)	UNIT 7 (~ 18 days)	UNIT 8 (~ 18 days)	UNIT 9 (~ 13 days) (Optional)
Functions and Volume	Associations in Data	Exponents and Scientific Notation	Pythagorean Theorem and Irrational Numbers	Putting it All Together

We create environments where students are inspired to be creative and critical thinkers as they prepare for success in life, college, and career.

- The development of +1 pathways that allow for student choice and provide opportunity for college credit.
- Exploration of additional CTE opportunities in the data reasoning pathway.
- Includes the four “keys” of college and career readiness: Key Cognitive Strategies, Key Content Knowledge, Key Learning Skills and Techniques, and Key Transition Knowledge and Skills.
- Nationally, many universities (including CAL and OUS) have removed course titles in their prerequisites.

234

Applicants to Harvard should excel in a challenging high school math sequence **corresponding to their educational interest and aspirations**. We recommend that applicants take four years of math courses in high school. Ideally, these math courses will focus on **conceptual understanding, promote higher-order thinking, and encourage students to use mathematical reasoning to critically examine the world**. Examples include rigorous and relevant courses in computer science, statistics and its subfields, **mathematical modeling**, calculus, and other advanced math subjects.

Harvard Math Requirements



Questions?