# THE OREGON STATE BOARD OF EDUCATION

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

**AGENDA**
**Regular Meeting**
**The Mill Casino and Hotel**
**3201 Tremont Ave**
**North Bend, OR 97459**
**Thursday, April 18, 2024**

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

**Please note: all times are approximate.**

1. **Call to Order**
   - A. **Roll Call**
   - *Time: 9:00 AM*
   - B. **Board Member Reports**
   - *Time: 9:05 AM*
   - C. **Break**
   - *Time: 10:00 AM*
   - D. **Director's Report** **3**
   - *Time: 10:05 AM*
2. **Public Comment**

*Time: 10:35 AM*

- A. The State Board of Education will hold space for virtual public comment. Individuals must register to provide virtual comment. Written public comment received will be posted to BoardBook. 24

3. **Consent Agenda**

*Time: 10:55 AM*

- A. Safe School Culture Grant: OAR 581-017-0283 73
- B. Homeschool Test Rule Cleanup: OAR 581-021-0026 81
- C. Process for Approval of Private School or Preschool as a Contractor with Public Agencies: OAR 581-015-2280 87
- D. Community Eligibility Provision (CEP) Incentive Program Rule Revision: OAR 581-051-0610 111
- E. Professional Learning Criteria to Support Inclusive Social Science Instruction: OAR 581-020-0700 117
- F. Proposed Changes to the Program Budgeting and Accounting Manual (PBAM) for 2024-2025 122

4. **Adoptions**



255 Capitol St NE, Salem, OR 97310 | Voice: 503-947-5600 | Fax: 503-378-5156| http://www.oregon.gov/ode/about-us

A. Policies and Procedures Updates 225
*Time: 11:00 AM*
B. Standards for Approved Recovery Schools 254
*Time: 11:15 AM*
Brenda Martinek and Kate Pattison, Office of the Director
C. Student Investment Account Focal Student Group Definition Updates: OAR 581-014-0001 272
*Time: 11:30 AM*
Blake Whitson and Rachael Moser, Office of Education Innovation and Improvement
D. Oregon Career Technical Education (CTE) Strategic Plan 280
*Time: 11:45 AM*
Jennell Ives, Office of Education Innovation and Improvement and Shalee Hodgson, Higher Education Coordinating Commission/Community Colleges and Workforce Development

5. **Break for Lunch**

*Time: 12:00 PM*

6. **Adoptions (continued)**

A. Schedule Update for Instructional Materials Adopted by the State Board of Education 319
*Time: 1:00 PM*
Jenna Montgomery, Alexa Pearson, and Angelica Cruz, Office of Teaching, Learning, and Assessment

7. **First Readings**

A. Senate Bill 992 (2023) Implementation: Certificate of Attendance Updates 335
*Time: 1:30 PM*
Don Dorman and Shava Feinstein, Office of Enhancing Student Opportunities
B. Senate Bill 3 (2023) Implementation: Course Requirements for Personal Financial Education & Higher Education and Career Path Skills 375
*Time: 1:55 PM*
Aujalee Moore, Beth Wigham, and Alexa Pearson, Office of Teaching, Learning, and Assessment
C. Administration of Medication: OAR 581-021-0037 412
*Time: 2:45 PM*
Ely Sanders, Office of Enhancing Student Opportunities
D. Corrections Education Funding Model: OAR 581-015-2940 450
*Time: 3:05 PM*
Sam Ko, Office of Enhancing Student Opportunities

8. **Informational Reports**

A. Computer Science Education Implementation Strategies and Standards Updates 477
*Time: 3:25 PM*
Andrew Cronk and Beth Blumenstein, Office of Teaching, Learning, and Assessment

9. **Adjourn**

*Time: 3:50 PM*



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# Director's Update

## Oregon State Board of Education

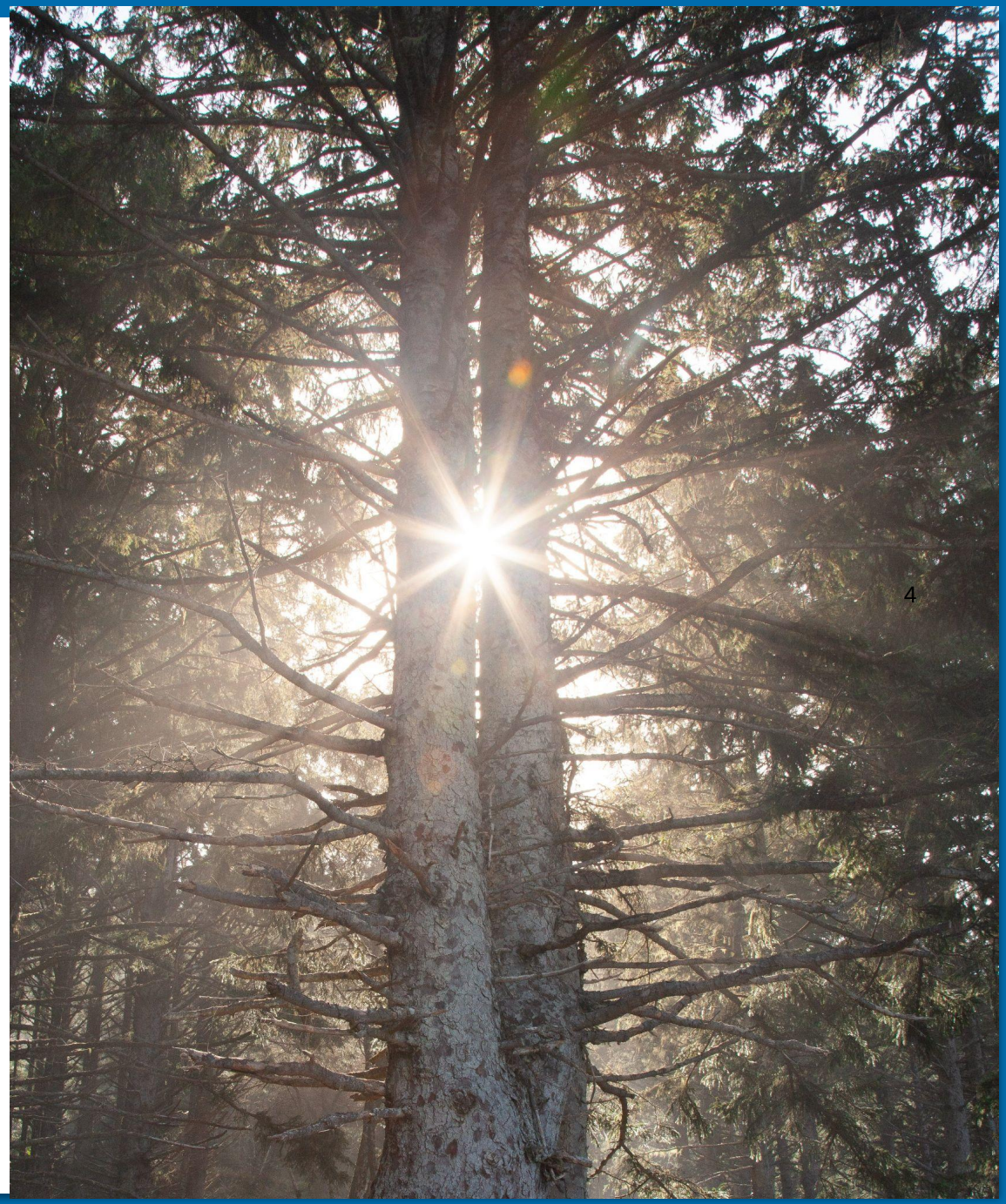
3

Dr. Charlene Williams

April 18, 2024

# Overview

- Priorities
  - Academic Excellence
  - Belonging and Wellness
  - Reimagining Accountability



# Academic Excellence:

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# Summer Bill Signing!



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# Belonging and Wellness

7

# Regular Attendance Matters

- There's a very strong correlation between good attendance and success in school, both social-emotionally and academically.

- Missed days add up quickly.

- While the causes of irregular attendance are often outside of a child’s control, the impacts are often acute and pervasive.

# Root Causes of Chronic Absenteeism

## Barriers

- Chronic and acute illness
- Family responsibilities or home situation
- Trauma
- Poor transportation
- Housing and food insecurity
- Inequitable access to needed services
- System involvement
- Lack of predictable schedules for learning
- Lack of access to tech
- Community violence

## Aversion

- Struggling academically and/or behaviorally
- Unwelcoming school climate
- Social and peer challenges
- Anxiety
- Biased disciplinary and suspension practices
- Undiagnosed disability and/or disability accommodations
- Caregivers had negative educational experiences

## Disengagement

- Lack of challenging, culturally responsive instruction
- Bored
- No meaningful relationships to adults in the school (especially given staff shortages)
- Lack of enrichment opportunities
- Lack of academic and behavioral support
- Failure to earn credits
- Need to work conflicts with being in high school

## Misconceptions

- Absences are only a problem if they are unexcused
- Missing 2 days per month doesn't affect learning
- Lose track and underestimate TOTAL absences
- Assume students must stay home for any symptom of illness
- Attendance only matters in the older grades
- Suspensions don't count as absence

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# Regular Attendance:

## The Data

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# How COVID Affected Attendance Reporting

| Time Period | Attendance Data Collected | 10 - Day Drop Rule |
|---|---|---|
| Pre-COVID | Physical attendance for in-person/ twice weekly check-ins for remote | In effect |
| Spring 2020 | None | None |
| 2020-21 School Year | Expanded Definition (daily participation, interaction, or coursework completion) | Suspended |
| 2021-22 School Year | Physical attendance for in-person/ Daily participation or interaction for remote | In effect |

# Impacts on the Data & What's True

- Data from 2020-21 should not be directly compared to other school years due to widespread remote learning and the suspension of the 10-day drop rule
- Data from 2021-22 and beyond is much more comparable to pre-pandemic data, since most students returned to in-person instruction
- Even though data are now comparable to pre-pandemic data, regular attendance rates have dropped
- There are still large disparities in the rates of regular attendance between student groups

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# No Easy Answers

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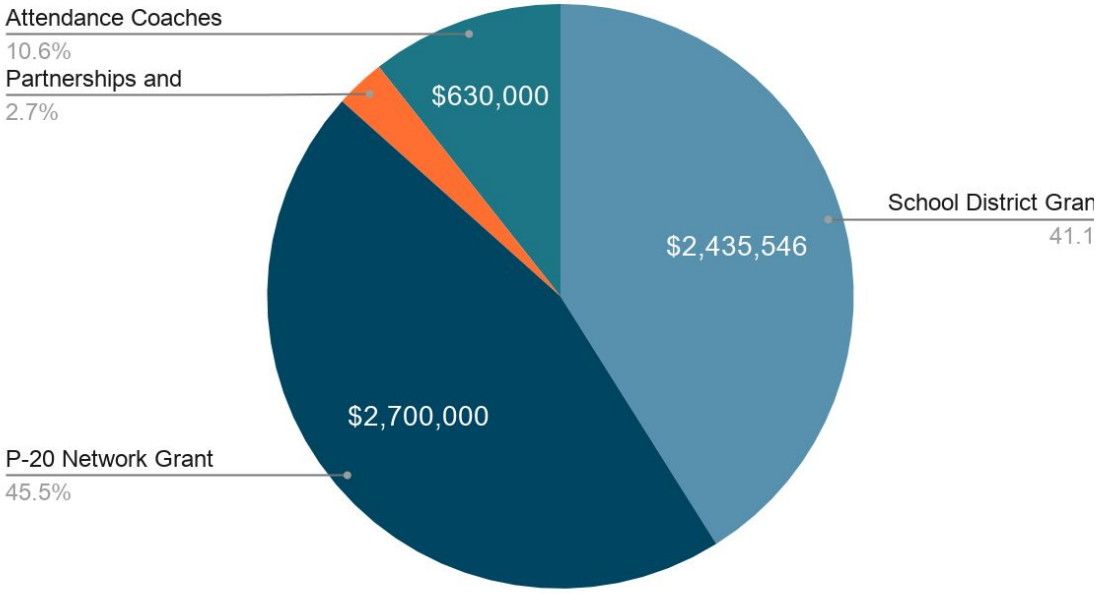
# An Integrated Approach:
## Attendance, Belonging, Engagement

- Every Day Matters (EDM)
- High School Success
- Tribal Attendance and Promising Practices
- Integrated Community Partnerships Grant

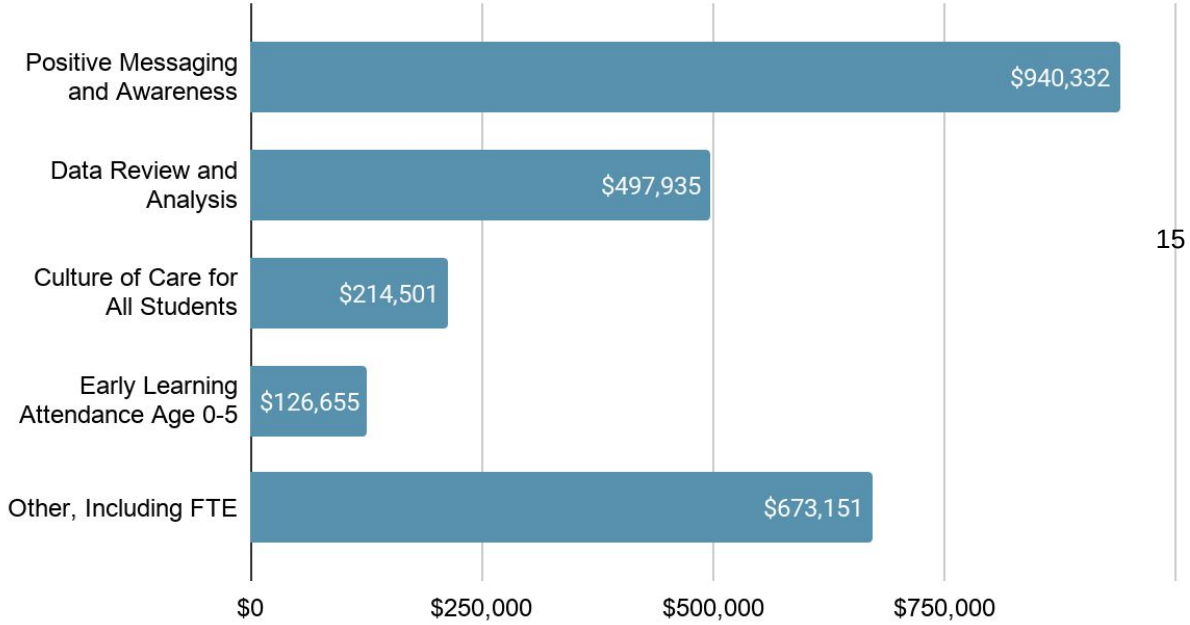


# 2017-2019 Investments

Funding by Allocation Area, 2017-19

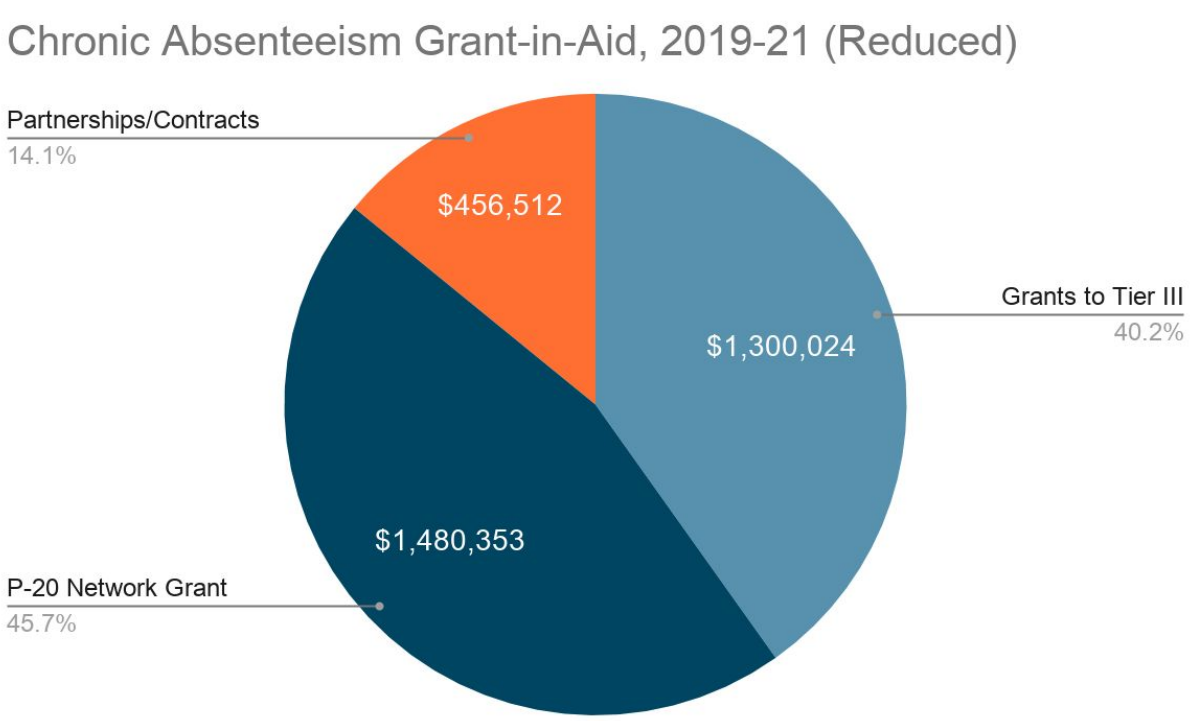


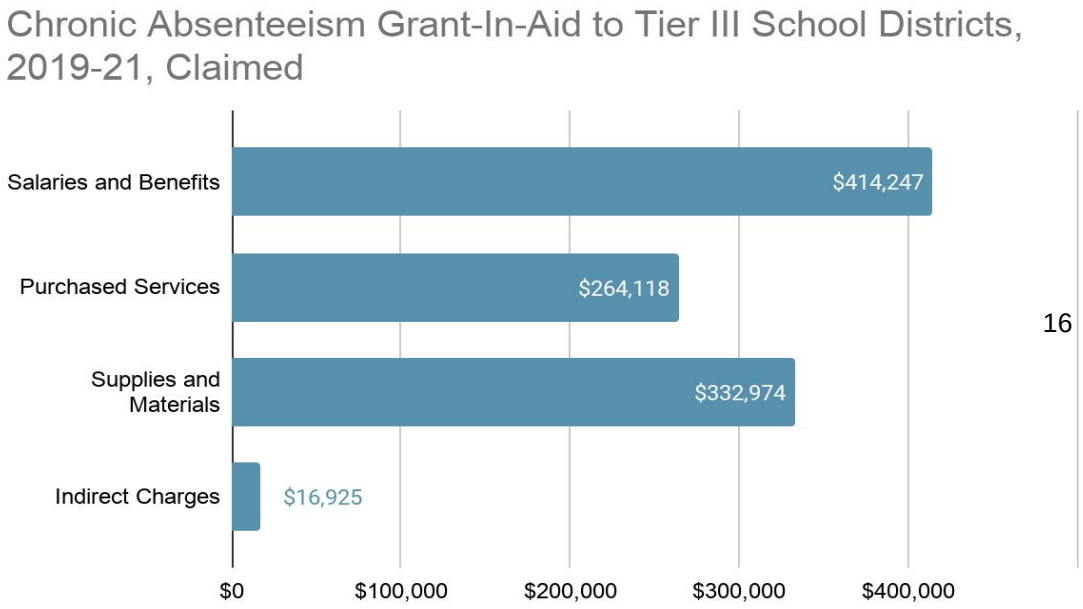

Tier III School District Grants by Area, 2017-19




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# 2019-2020 Investments

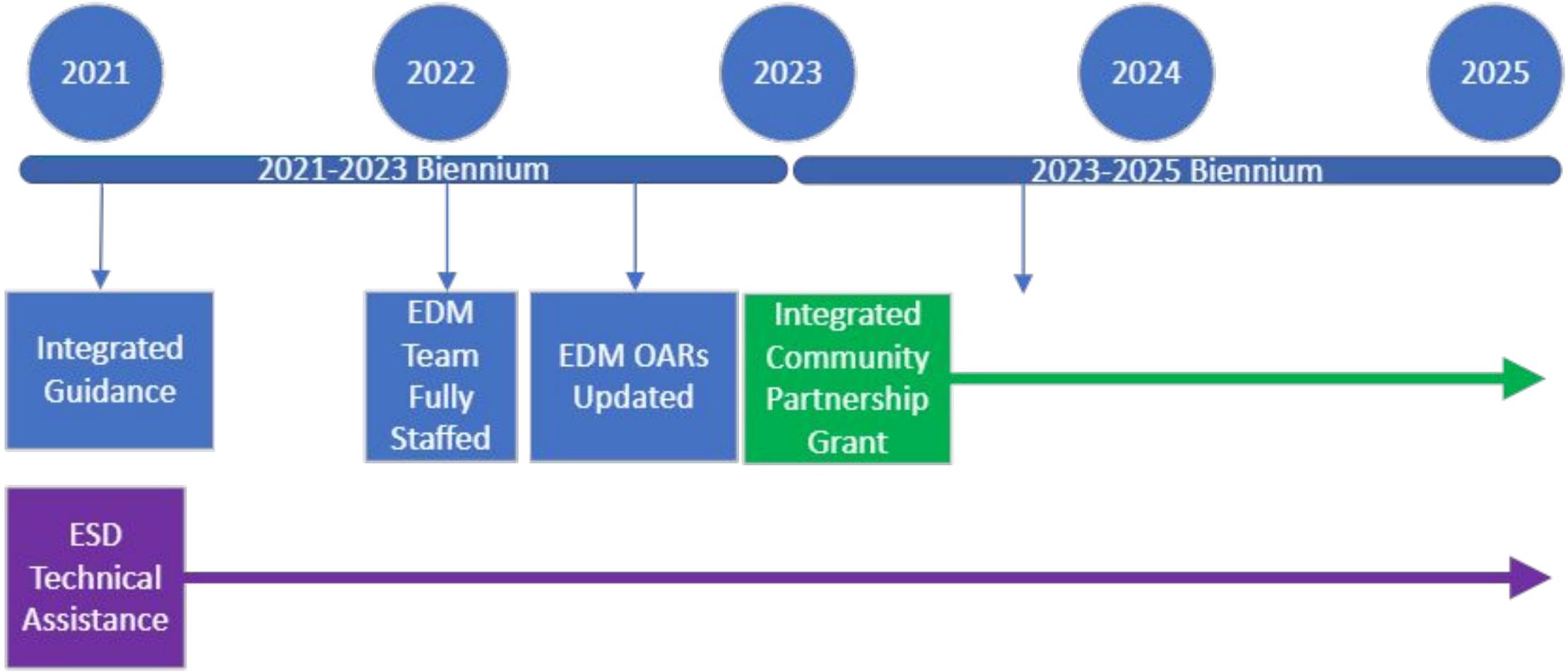



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*Funding was paused in August 2020*

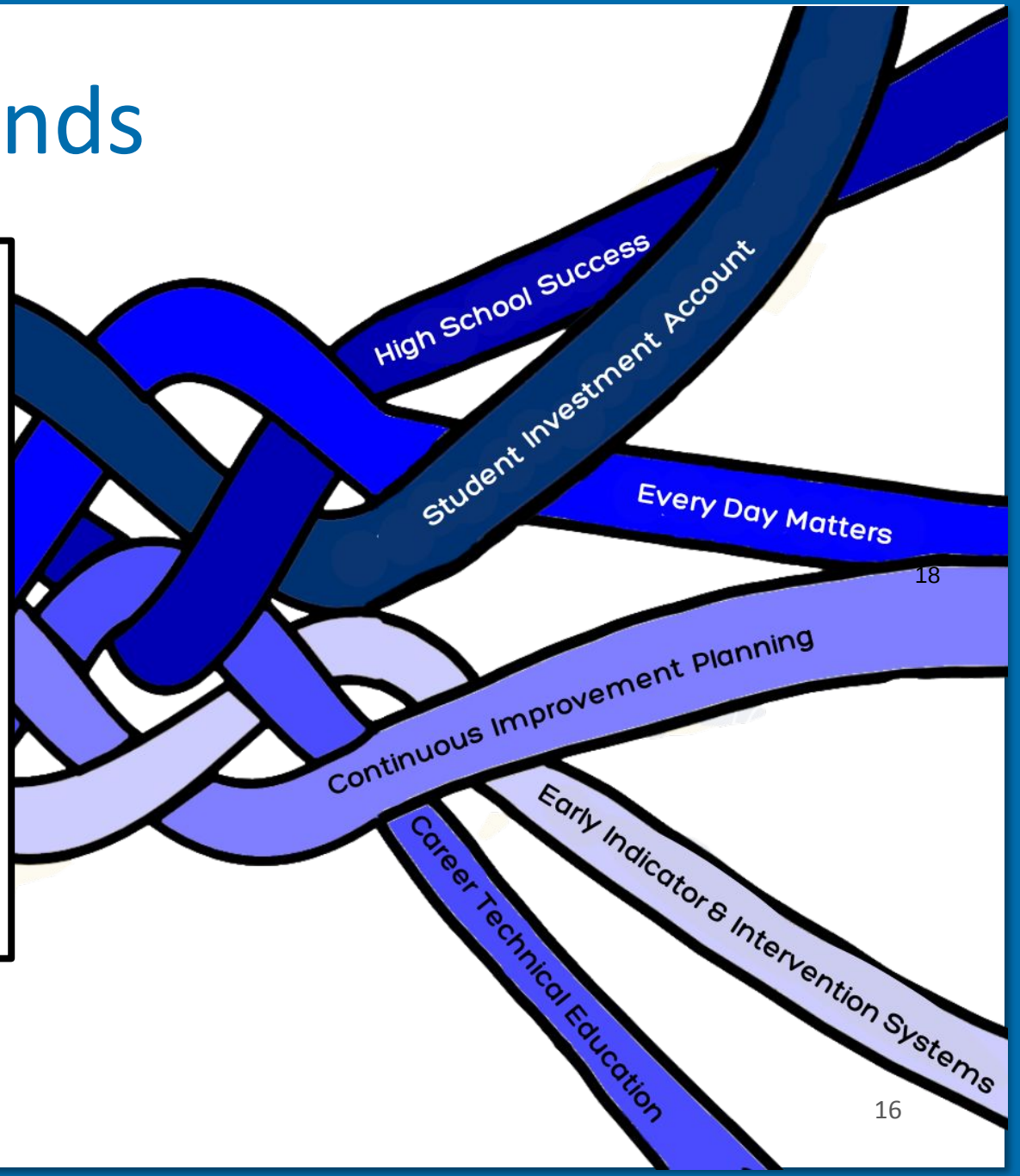
# EDM Today


2021
2022
2023
2024
2025
2021-2023 Biennium
2023-2025 Biennium
Integrated Guidance
EDM Team Fully Staffed
EDM OARs Updated
Integrated Community Partnership Grant
ESD Technical Assistance

# Braiding and Blending Funds

EDM foundational understandings:

- Create a positive school climate and culture extending beyond the school campus
- Utilize disaggregated data to identify evidenced-based supports to build or adjust student support systems
- Develop strong partnerships with students and families that center engagement and re-engagement strategies
- Coordination of support between educators and community service providers, particularly across focal student groups.

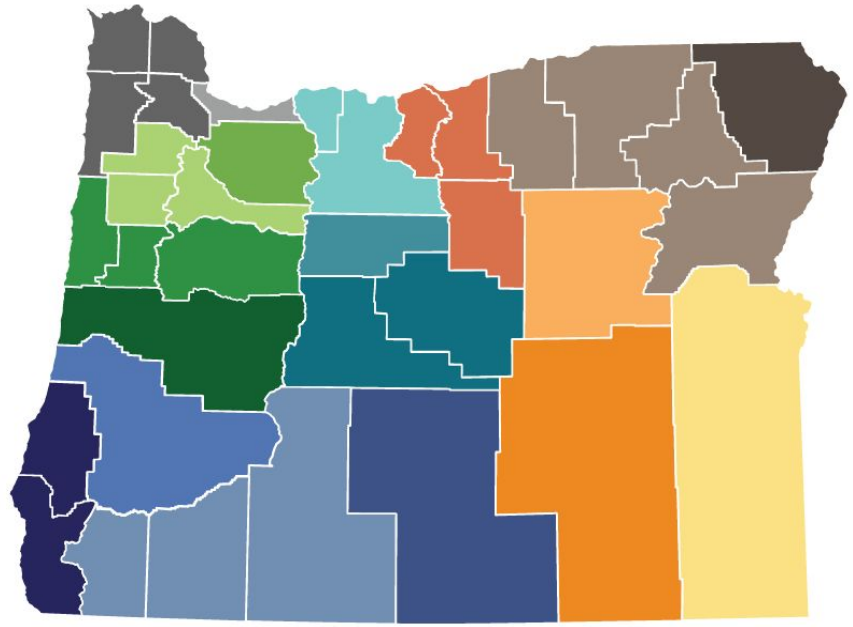


# Partnerships with all 19 ESDs

Technical Assistance grants to all ESDs

Primary expenditure areas

- FTE for Student Engagement Specialist
- Professional Learning  and Communities of Practice with districts
- Contracting with National Organizations
- Translation Services
- Student Engagement Tools



| | | | |
|---|---|---|---|
| Clackamas ESD | Columbia Gorge ESD | Douglas ESD | Grant County ESD |
| Harney ESD | High Desert ESD | InterMountain ESD | Jefferson County ESD |
| Lake ESD | Lane ESD | Linn Benton Lincoln ESD | Malheur ESD |
| Multnomah ESD | North Central ESD | NW Regional ESD | Region 18 - Wallowa ESD |
| South Coast ESD | Southern Oregon ESD | Willamette ESD | |

# District Actions, Strategies, and Outcomes

- Attendance Teams, Student Support Teams
- Student Success Coordinators
- Family and Community Engagement Specialists
- Enhance EIIS and MTSS, develop practices across district
- Enhancing student information systems and data tools
- Increase equitable access to social, mental and behavioral health
- Increase breadth of co-curricular opportunities for students



# Emerging Strategies

**Nationwide**

- Building stronger relationships with student and families
- Partnering with medical community
- Providing high-dosage tutoring
- Increasing summer learning and extended or afterschool learning time
- Adoption of Early Indicator & Intervention Systems
- Effective use of data

**Grantees**

- Increase parent/family agency to navigate systems and meet their family's basic needs
- Build school cultural awareness and recruit mentors from the community
- Partner with mental and behavioral health professionals in the field
- Address barriers to attendance for youth experiencing houselessness
- Implementation of data-informed practices which support the unique characteristics and social experiences of BIPOC children/youth
- Provide one-to-one tutoring
- Increase summer learning and extended or afterschool learning time

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# Promising Practices Across the State

Relationships:

- School administration and staff have increased the amount of personal contacts with families that have students who are absent

Creating a safe and welcoming environment:

- Improving bilingual support
- Incorporating student voice in decision making
- District-wide events

Student Engagement:

- Increased access and options to CTE programs across focal student groups
- Community based hands on learning opportunities that connects to the curriculum

Community Partnerships:

- College and career connections - field trips to internships and more

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# Questions?

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ASHA
American
Speech-Language-Hearing
Association

April 10, 2024

Mr. Haedon Brunelle
Oregon Department of Education
255 Capitol St. NE
Salem, OR 97301

RE: Speech-Language Stipend Program

Dear Mr. Brunelle:

On behalf of the American Speech-Language-Hearing Association (ASHA), I write to

- express support for the Speech-Language Stipend Program in providing stipends to both speech-language pathologists (SLPs) and speech-language pathology assistants (SLPAs) working in school districts for a minimum of two years; and
- recommend amendments to the proposed regulations.

ASHA is the national professional, scientific, and credentialing association for 234,000 members, certificate holders, and affiliates who are audiologists; SLPs; speech, language, and hearing scientists; audiology and speech-language pathology assistants; and students. Over 2,400 ASHA members reside in Oregon.[1]

SLPs are uniquely educated and trained to assess and treat speech, language, swallowing, and cognitive communication disorders in children and adults. These services help children acquire language and enable people to recover essential skills to communicate about their health and safety; swallow adequate nutrition safely; and have sufficient attention, memory, and organizational skills to function in their environment.

ASHA supports the Speech-Language Stipend Program that would provide a

- $9,000 stipend per academic year for qualifying SLPs; and
- $2,000 stipend per academic year for certified, appropriately trained, and supervised SLPAs.

SLPs working in school settings often face high caseloads and high volumes of paperwork while working with a range of students who may have complex communication disorders or may be considered medically fragile.[2] In addition, school practitioners may have to take on duties outside of their normal scope due to personnel shortages.[3] As a result, schools may have challenges with recruiting and retaining SLPs. Providing annual stipends can help lessen the burden on SLPs and the SLPAs they supervise. It may also help cut down on the many contractors who are temporarily filling vacant positions at higher costs.

ASHA recommends the following amendment to the proposed regulations:

In Section 581-017-0880 (f), we recommend substituting “student” with “speech-language pathologist or speech-language pathology assistant” in order to clarify that the stipend applies to the time that the practitioner is in their district employment year.

Thank you for considering ASHA’s support for this program and our proposed amendment. These regulations will help to ensure both enhanced recruitment and retention of highly qualified, licensed, and certified professionals who serve students of Oregon’s schools. If you or your staff have any questions, please contact Eileen Crowe, ASHA’s director of state association relations, at ecrowe@asha.org.

Sincerely,



Tena L. McNamara, AuD, CCC-A/SLP
2024 ASHA President

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[1] American Speech-Language-Hearing Association. (2022). *Oregon* [Quick Facts]. https://www.asha.org/siteassets/advocacy/state-fliers/oregon-state-flyer.pdf.

[2] American Speech-Language-Hearing Association. (2022). *2022 Schools Survey: SLP Caseload and Workload Characteristics*. https://www.asha.org/siteassets/surveys/2022-schools-survey-slp-caseload.pdf.

[3] American Speech-Language-Hearing Association. (2022). *2022 Schools Survey: SLP Workforce and Work Conditions*. https://www.asha.org/siteassets/surveys/2022-schools-survey-slp-workforce.pdf.

Vice-Chair Scurlock, 2nd Vice-Chair Montgomery, members of the Board: my name is David Fortney. I work at Portland General Electric and recently joined the CTE Advisory Council as a business and industries representative and honored to be its co-chair.

Thank you for the opportunity to provide a few comments on Oregon's CTE State Plan. I am very excited about the State Plan and believe it articulates clear outcomes and strategies to achieve them.

I believe that CTE plays a critical role in helping sustain and grow our economy and provides the opportunity for individuals to learn and pursue meaningful careers and gain livable wages. Portland General Electric, like many businesses, rely on Career and Technical Education to grow the next generation of our workforce.

There are 3 things in the State Plan that I am really excited about and want to share with you.

One. It outlines a vision for how we align education and workforce systems toward leveraging resources, building learning pathways, and optimizing career connected learning opportunities in multiple programs of study

Two. It is set up to meet the business demands of our economy and grow the workforce of tomorrow. As a representative of business, this is very important to me. The economy is not static, and the systems that support it shouldn't be either. I am specifically excited about how we set up our learners to be successful for the future by strengthening the quality of CTE Programs of Study.

Three. The plan centers on equity and builds on and leverages the diverse representation of learners that currently participate in CTE. It starts to answer how we can further expand opportunities for diverse learners and how we align our policies and decisions to ensure everyone in our state has the opportunity to participate and make a living in our economy.

I'm excited for the CTE Leadership Team to engage key stakeholders over the next few weeks to create a shared understanding of the plan.

With that, I conclude my statement. Thank you for your time today.

**From:** Brad Gerards
**To:** StateBoard Public Email
**Subject:** public comment: 7.B. Senate Bill 3 (2023)
**Date:** Wednesday, April 17, 2024 2:53:39 PM

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You don't often get email from gerards@gresham.k12.or.us. Learn why this is important

Hello.
I'd like to comment on ODE's potential proposal to allow the standards set forth by SB3 to be met by other courses and not a stand-alone course. As a high school educator, I understand why districts are asking for this flexibility, but it is not a good idea. The whole reason SB3 came up in the first place was intended for it to be a stand-alone course. Research from NEFE suggests that financial education is most effective and appropriate when done in a stand-alone course, and American adults reflecting on their own financial education experiences say the same thing.
My own experiences as a business and finance educator also tell the same story. Students are most impacted by a financial education when it is done on its own and the proper time, depth, and experiences can be applied.
Please keep the original intent of HB3 and require a stand-alone financial education course.
Thanks for your time. Your efforts are very much appreciated.

--
**Brad Gerards**
Business/Technology Teacher
Springwater Trail High School

**From:** Leong, Brent
**To:** StateBoard Public Email
**Subject:** Public comment: 7.B. Senate Bill 3 (2023)
**Date:** Wednesday, April 17, 2024 2:09:46 PM

You don't often get email from brent.leong@orecity.k12.or.us. Learn why this is important

Hello,

I would like to comment about Senate Bill 3 in regards to Personal Financial Literacy for high school students, beginning with the graduating class of 2027. I am a CTE Business educator who has taught at the secondary level for the last 27 years. Oregon is in desperate need of ensuring that students who leave our K-12 environment are prepared for their futures, especially in regards to personal financial literacy. I along with many others have advocated for personal financial literacy as a graduation requirement in all high schools in Oregon.

I and others have seen that students graduating are not prepared for all of the financial world that comes with adulthood. We need a **STAND ALONE** class that teaches students how to manage credit and their credit score, purchase and utilize insurance to their benefit, learn how to invest for their future, understand how taxes work and how it affects them, and understand how to manage their money safely in today's digital universe. As an educator, I have even invested many hours being part of the Senate Bill 3 work committee who were in charge of helping guide the standards for the Personal Financial Literacy **STAND ALONE COURSE!**

We have advocated for a Personal Financial Literacy **STAND ALONE** class and the legislature of Oregon listened and Senate Bill 3 has come to fruition. We DO NOT want the Oregon Dept. of Education to WATER DOWN the intent of the **STAND ALONE** Personal Financial Literacy class to include economics or financial math. These courses have not and will not be a fit for the STAND ALONE Personal Financial Literacy class. Don't let ODE lower what the people of Oregon wanted in this lesligation.

ODE MUSTfollow through with what is expected and keep Personal Financial Literacy as a STAND ALONE CLASS!

Thank you,

Brent Leong

--
Brent Leong
CTE Business/Computer Science teacher
Oregon City School District
brent.leong@orecity.k12.or.us
(503) 785-8945

Clackamas Community College Part-time Instructor - brent.l@clackamas.edu

OCSD Synergy secondary assistance - brent.leong@orecity.k12.or.us

OCSD CLASS Coordinator - class@orecity.k12.or.us

**If you need someone to talk to:**

- Oregon YouthLine:  Call 877-968-8491 or text "teen2teen" to 839863
- Trevor Project (LGBTQ Youth support): Call 866-488-7386 or text 678-678

**For urgent mental health concerns:**

- Clackamas County 24/7 Crisis and Support Line: 503-655-8585
- Willamette Falls Emergency Department: 503-656-1631

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Date: April 17, 2024

To: Oregon State Board of Education

From: Morgan Allen, Coalition of Oregon School Administrators
Reed Scott-Schwalbach, Oregon Education Association
Efren Zamudio, Oregon School Boards Association

Subject: Agenda Item 7B. Draft Rules regarding Senate Bill 3 (2023) Implementation: Course Requirements for Personal Financial Education and Higher Education & Career Path Skills

Dear Chair Martinez Zapata, Vice Chair Scurlock, and Members of the Oregon State Board of Education:

On behalf of the Coalition of Oregon School Administrators, Oregon Education Association, and Oregon School Boards Association, we submit this letter regarding Agenda Item 7B – the draft rules relating to Senate Bill 3 (2023) Implementation: Course Requirements for Personal Financial Education and Higher Education and Career Path Skills.

Our members lead 197 school districts and 19 education service districts that serve over half a million students in Oregon. Collectively, we speak for those doing the work on the ground every day in our schools to support student success and well-rounded learning.

In providing feedback on this draft rule, we are centering the educational experiences of Oregon students, particularly our students from different focal populations and students who are attending small, rural, and remote schools.

We want to be clear: we support the instruction of i) Personal Finance Education, and ii) Higher Education & Career Path Skills as we help prepare students for their next step after graduation. We also want to express our appreciation to the team at the Oregon Department of Education for their work in engaging many different partners in this rules engagement process.

**Our Recommendation:**

**As you review the draft rules and the key policy considerations, we strongly recommend that the State Board adopt Option A.**

Option A would allow Higher Education & Career Path Skills and Personal Financial Education standards to be integrated into other content area courses and vice versa.

This two-way integration model approach for both i) Personal Finance Education and ii) Higher Education & Career Path Skills are critical for centering the educational experiences of students, and supporting implementation of the Senate Bill 3.

**Two-Way Integration Model Examples Featuring Personal Finance**

In our schools, there is a breadth and range of current course offerings that students could take to potentially fulfill a personal finance credit and the legislative intent of SB 3, as long as these courses meet the learning standards.

**For example:**

- Economics course fulfilling a personal finance credit – and vice versa
- Financial algebra course fulfilling a personal finance credit – and vice versa
- CTE courses such as business or accounting fulfilling a personal finance credit – and vice versa

We strongly recommend that you adopt a two-way integration model so that students may fulfill the Personal Finance credit through other courses that meet the Personal Finance learning standards – ensuring our schools have the flexibility to incorporate the standards in ways that make the most sense for students, as is currently allowed and practiced in all other content areas. Additionally, as described in the rule docket, Oregon already has successful examples of this kind of integration.

**Our Shared Concerns Regarding Option B Outlined in the Draft Rules**

Option B outlined in the draft rule would allow two-way integration for the Higher Education & Career Path Skills, **but** requires that Personal Financial Education standards are taught in a standalone course. Other content area standards may be integrated into a Personal Financial Education course, but Personal Financial Education Standards could not be integrated into a different content area course.

In other words, Option B requires a one-way integration model for Personal Finance, where districts must create a standalone course on Personal Finance – and while that course could fulfill other credit requirements, such as math – it could not work the other way. Setting up the rule this way would make Personal Finance education unique among all other content areas in Oregon.

**We believe that one-way integration will cause a number of unintended impacts for students, educators, and staff.**

**Potential Unintended Impacts**

- **Limiting multi-disciplinary course offerings for students.** For example, Option B could create barriers for students in meeting the Personal Finance credit, due to limited course offerings, and the lack of two-way integration (reciprocity). With this rule set – when a student takes a Math course, it would not be able to fulfill the Personal Finance credit requirement even if the Personal Finance standards are covered. No other content area in Oregon works this way.

- **Crowding already packed class schedules for students and straining the capacity of educators, especially in small, rural, and remote schools.** For example, if there is only one-way integration for the Personal Finance credit and a standalone Personal Finance course would be required – we believe that this would add additional strain on already packed class schedules for students; it would also impact the capacity of our educators and staff given the timeline of implementation, and the fact that no resources were provided to schools to implement Senate Bill 3.

It is important to note that when it comes to Option B, two-way integration for Higher Education & Career Path Skills would be permitted – which means that different courses (Math, Language Arts, Social Studies, Career and Technical Education, etc) could fulfill the Higher Education & Career Path Skills credit, and that Higher Education & Career Path Skills courses could also help fulfill a math, language arts, social studies, and CTE credit, etc, provided that the courses align with the learning standards. Unfortunately, this same reciprocity would not be allowed for Personal Finance under Option B.

**In closing, we urge that you adopt Option A, which would permit a two-way integration model approach for both i) Personal Financial Education and ii) Higher Education & Career Path Skills. The two-way integration model is critical for continuity, clarity, and consistency for our students, educators, and staff.**

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

**From:** Bender, Lisa M - (lisabender)
**To:** StateBoard Public Email
**Subject:** Support of SB 3 Financial Education
**Date:** Wednesday, April 17, 2024 12:04:19 PM

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You don't often get email from lisabender@arizona.edu. Learn why this is important

Greetings,

My name is Lisa Bender. I am an education and marketing specialist for Take Charge Today, one of the free, premier financial education programs in the country and based out of the University of Arizona. Previously, I taught Business Education and Economics in Maryland Public Schools for 30 years. I write to you today in support of SB 3 which suggests the need for a **standalone personal finance course for all students graduating from Oregon's school system.**

As a former classroom teacher on the front lines of financial education, I can't begin to tell you how many student graduates circled back to me (and continue to do so) with thanks and gratitude for being able to take my standalone personal financial management course. In Maryland Public Schools, the teaching of personal finance is mandated to be embedded into the curriculum for grades 3-12. However, Maryland's county school districts can "step up to the plate" and go further than simply embedding it into a course. Counties can mandate that students must complete a full standalone course. I was so fortunate to teach in a county where this was graduation mandates was passed and implemented by the elected school board officials. As a result, my students were able to receive a full and robust curriculum that allowed them to gain knowledge and skills that can last them forever! We covered all the national and state standards in this class to provide a comprehensive walk through many of adult life financial decision-making events (i.e. credit cards, higher education exploration, school loans, saving and investing, fraud and ID theft protection, financial well-being, insurance, earning and careers, receiving from government, receiving help from friends and family, wills and estate planning).

My district in Maryland provided students the opportunity to complete the graduation requirement by taking an Economics Course, but guess what happened every time that course was taught? Not much/no time left to teach personal finance topics. Students undoubtedly learned lots of macro and microeconomic concepts, but time and again the instructor didn't leave

any class time to teach students personal finance skills. Therefore, they never got hands-on practice creating a budget, practicing investing in stocks, and practicing the management of a paycheck and checkbook, and how to prepare and file their income taxes.

In the real world of school life, when a financial literacy curriculum is embedded into an existing course, time runs out to cover personal finance topics with the exception of a personal finance story here or there from their instructor. The students truly lose out on a significant opportunity to build and boost their money management skills, skills that can last them a lifetime.

Having a full standalone course to provide young people time to practice making financial decisions in a safe environment with fictional scenarios based on real life, hands-on learning is the winning framework that young people need and want! By providing the time and attention with a full course, students are exposed to the many complex and challenging financial decisions they will soon face as adults. A full course allows students to safely practice making mistakes and learning from them as the navigate scenarios and simulations based on real life. Mandating a full, standalone course prepares students with knowledge and skills they're craving to learn.

When I transitioned from the classroom to my full-time position working with Take Charge Today, where I design and write financial education curriculum and train teachers (some from Oregon) all over the country, I hear the same stories: Financial Literacy is simply embedded into an existing course and the students never get the full scope and sequence of these truly important lessons.

I write to encourage each and every one of Oregon's Public Schools Board of Education members to vote in favor of mandating a full stand-alone personal finance course for all students to graduate. This vote will truly make a difference during the formative years of students in high school and impact their lives for years to come. And those Oregon teachers asked to teach the standalone course will hear from graduates as they circle back, just like my students circle back now, to say "Thank you! This (full, standalone mandated course) has made all the difference!"

Regards,
Lisa Bender

***"Becoming financially literate is not just beneficial for an individual,***
***it's also beneficial for the employer for whom they work,***
***the community in which they live, and for our nation as a whole."*** **- Lisa Bender**

*Lisa M. Bender, M.Ed., NBCT*
Take Charge Today
Education & Marketing Specialist TCT
National Master Educator Team Director
lisabender@arizona.edu
lisatctoday@gmail.com
301-616-4390 mobile

**From:** Morgan Wadlow
**To:** StateBoard Public Email
**Subject:** Public Comment: 7.B. Senate Bill 3 (2023)
**Date:** Wednesday, April 17, 2024 2:11:43 PM

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You don't often get email from morgan.wadlow@albany.k12.or.us. Learn why this is important

To whom it may concern,

I am writing to ask legislators to ensure that the fulfillment of SB3 be through a Personal Finance class that is taught by a licensed business teacher or teacher with an endorsement in personal finance. This should not be a math or economics class, but should be one focused entirely on teaching the Standards outlined in the draft for SB3.

It is important that the personal finance class focus on behavior, budgeting, spending, saving, taxes, and insurance. These topics are not the same as those taught in a Financial Math or Economics class.

Thank you,

Morgan Wadlow

--

**Morgan Wadlow**
**Marketing Education Teacher**
**Head Cheerleading Coach**
**West Albany High School**

**West Albany Cheerleading Website:**
**bit.ly/wahscheer**

*The content and views expressed in the e-mail are those of the sender, and may not represent the School District. The e-mail may contain confidential information or communication relating to an individual student that is a confidential student record under Oregon and/or federal law, and may not be reviewed, distributed, or copied, by any person other than the individual(s) to whom it is addressed. If you are not the intended recipient, please advise the sender by reply e-mail and immediately delete the message without copying or disclosing the contents.*

Oregon State Credit Union

Board of Education

State of Oregon

RE: Rulemaking on SB 3

I am Rick Metsger, representing Oregon State Credit Union. OSCU has long been an advocate for a robust financial education graduation course requirement and helped move SB 3 to passage in the 2023 session.

The legislative history, text and testimony, including testimony provided by the Oregon Department of Education on March 7th, 2023 to the Senate Education Committee clearly provided the intent that financial education, and quoting now from the ODE Testimony: "From statewide engagement and testimony before the Senate Education Committee, it is clear that financial literacy courses are most successful when offered as stand-alone courses."

We worked hard with all parties to meet the needs of administrators and other professionals who expressed concern about adding additional graduation requirements. We came to an agreement that the personal finance course could also, depending on the instruction techniques utilized, also might count for other credit requirements. But the Financial Education Course was controlling. For example, a Financial Education course taught by a math teacher who used algebraic principles in teaching how to calculate mortgage amortization or compute credit scores might be able to count the Financial Education Course as fulfilling an Algebra requirement as well. But it was NEVER the other way around. That would be the status quo which is why the Legislature stepped in to ensure a robust, comprehensive financial education curriculum. The legislative history is clear. There was no other interpretation by members of the Legislature in their testimony of support.

Responding to a request from Sen. Kim Thatcher on the text of the enrolled bill, Legislative Counsel wrote the following:

***"…the primary focus of the course would need to be higher education and career path skills or personal financial education in order to satisfy the credit requirements. Adding layers related to higher education and career path skills or personal financial education to an existing course most likely would not satisfy the legislative intent of providing that specialized instruction because the instruction must be focused on those subject matters."***

Hannah Lai

Deputy Legislative Counsel



PO Box 306, Corvallis, Oregon 97339-0306
800-732-0173 • oregonstatecu.com

Oregon State
Credit Union

Especially troubling, is that the final draft rule was released a week ago that was true to that intent, and now, out of nowhere, there is suddenly an alternative rule being presented ( listed as Option “A”) that eliminates the core requirement and essentially takes us back to the way things have always been. That is unacceptable. It is also unacceptable that this was done without transparency to the public and is being presented to you differently than the original published draft we all relied upon.

The option “A” draft rule destroys the legislative intent of SB 3. Option “B” ( interesting how this has now become choice “B”) is the original rule and what we all collaborated in good faith during the legislative process and needs to be adopted. Transparency of process and commitment to the good-faith collaboration we honored needs to be honored by the Board as well. The people of Oregon expect the legislative process and intent will be respected and advanced.

Sincerely,

Rick Metsger



PO Box 306, Corvallis, Oregon 97339-0306
541-714-4000 800-732-0173 • oregonstatecu.com

**From:** Pamela Leavitt
**To:** StateBoard Public Email
**Subject:** Rule Implementation on SB3
**Date:** Wednesday, April 17, 2024 12:01:40 PM

You don't often get email from pleavitt@gowest.org. Learn why this is important




April 16, 2024

Members of the Oregon State Board of Education,

Thank you for the opportunity to provide comments and feedback on the implementation of Senate Bill 3 and the draft rules being adopted by the State Board of Education.

As not-for-profit cooperatives, credit unions' commitment to the community is in their everyday DNA. Across the state, credit unions look out for consumers' financial well-being by providing financial education, helping them save for a brighter future, helping them get the keys to their dream homes, and open businesses on Main Street.

The GoWest Credit Union Association worked with Senator Rob Wagner and Senator Tim Knopp to develop and introduce SB3 in the 2023 legislative session and was the lead advocate working the bill through the full session. As stated in the ODE background paper, the bill's concepts received broad support from educators, parents, students, and business and community partners.

As you consider the development of the new courses focused on a 0.5 credit in Personal Financial Education and a 0.5 credit in Higher Education and Career Path Skills, as part of the 24 credit requirements, we ask that you consider the written and oral testimony during the discussion on SB3. For example, from ODE, "In considering Senate Bill 3, a possible consideration would be to remove financial literacy standards from social science and develop standards that create a framework for instruction and classroom assessment of the future planning and financial literacy standards and related course(s). From statewide engagement and testimony before the Senate Education Committee*, it is clear that financial literacy courses are most successful when offered as* ***stand-alone courses****."*

While we believe the legislative intent clearly planned these credits as individual courses, we also understand that Legislative Counsel has ruled that the State Board of Education is authorized to adopt rules that allow a course in higher education and career path skills or a course in personal financial education to also satisfy other credit requirements for graduation. Oregon credit unions understand the many factors going into rulemaking, like teacher training, and want to be good partners working with the Department of Education on the implementation of this critical legislation. As you consider the proposed rules, both Options A and B, we asked that you approve Option B, which fulfills the goals of a personal finance class.

Expanding financial literacy opportunities for local students is a logical step for our state, and credit unions can be effective partners given our ongoing community outreach and missions. Empowering young people with the financial tools they need to be successful as adults is critical and we're excited to work with the State of Oregon to offer this curriculum to students.

For Oregon credit unions, teaching people about money is more than just keeping them informed about how much they have in their accounts. It's about arming them with the knowledge to make smart choices to secure a better future. When credit unions show the outcomes of financial literacy, like financial freedom, they can help lead people down a path of lifelong financial learning.

The rule implementation requires the development of new standards designed to support students in developing skills they will need to be successful in their future lives. Oregon credit unions will be effective partners in your execution of these new standards.

Thank you for the opportunity to provide these comments.

Pam

Pamela Leavitt
Sr. Vice President Regional Grassroots & Political Programs/Legislative Affairs for Oregon
503.887.2336 | 800.995.9064
gowestassociation.org
Oregon Credit Unions - GoWest Credit Union Association



**ROSENBERG Corey * ODE**

**From:** Art <professorwit@gmail.com>
**Sent:** Sunday, April 7, 2024 5:58 PM
**To:** MARTINEZ-ZAPATA Guadalupe * STBRD; ROSENBERG Corey * ODE
**Cc:** WILLIAMS Charlene * ODE; RICHARDSON Cynthia * STBRD; WHEELER Bridgett * STBRD; FORDE Libra * STBRD; Gustavo Morales; Shimiko Montgomery; LOPEZ SANCHEZ Vicky * STBRD; SCURLOCK Jennifer * STBRD; URBINA Carmen * ODE; WETHERELL Tenneal * ODE
**Subject:** Missing: Pledge of Allegiance. Found: Opportunity for Unity

Some people who received this message don't often get email from professorwit@gmail.com. Learn why this is important

Dear Chairman Guadalupe Martinez Zapata,

I've noticed the absence of the Pledge of Allegiance in recent Board meeting videos, suggesting a shift away from this patriotic tradition.

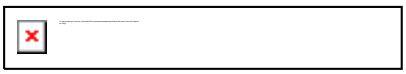
## Key Points:

- Tradition Missed: The Pledge has unified 197 Oregon school districts and 20 educational service districts, setting a patriotic example of leadership.
- Legal and Rule Adherence: Oregon Administrative Rules (OAR) support reciting the Pledge during the school day, highlighting its educational value.
- **Proposal for the upcoming April 18th Meeting:**
  - Immediate Action: Reintroduce the Pledge of Allegiance as the first agenda item for all Board meetings, starting on April 18th.
  - Backup Plan: If not feasible by the 18th, I'll request to lead the Pledge during the public comment section via Zoom, assisted by a group of disabled veterans, until it becomes a regular agenda item.

## Reminder:

- **It's Not Your Flag or Pledge, It's Theirs!**
- The Pledge and the flag represent our nation's collective heritage and values, not the preferences of any single group or individual.

### It's Their Flag!



## Considerations:

- The Pledge has been foundational in Oregon Education since 1951. Its removal, influenced by modern "woke" perspectives, overlooks its historical importance.
- Action Needed: Reinstating the Pledge affirms our commitment to unity and patriotic values.

## Conclusion:

Let's honor our educational heritage and our nation's principles by bringing back the Pledge of Allegiance. I look forward to your support and collaboration on this matter.

Lead by example.

Best regards,

**ProfessorWit**

## ROSENBERG Corey * ODE

**From:** Art <professorwit@gmail.com>
**Sent:** Thursday, April 11, 2024 12:09 PM
**To:** MARTINEZ-ZAPATA Guadalupe * STBRD; ROSENBERG Corey * ODE; WILLIAMS Charlene * ODE; RICHARDSON Cynthia * STBRD; WHEELER Bridgett * STBRD; FORDE Libra * STBRD; Gustavo Morales; Shimiko Montgomery; LOPEZ SANCHEZ Vicky * STBRD; SCURLOCK Jennifer * STBRD; URBINA Carmen * ODE; WETHERELL Tenneal * ODE
**Subject:** Request for American and Oregon Flags at Upcoming Remote Board Meeting in North Bend

Some people who received this message don't often get email from professorwit@gmail.com. Learn why this is important

Dear Members of the Oregon Board of Education,

I hope you are doing well. I am writing to you to prepare for the upcoming remote board of the Board of Education meeting in North Bend, Oregon. As we adapt to the changing dynamics of public meetings, I want to express my appreciation for the Board's efforts in facilitating these crucial gatherings in a remote format.

In keeping with tradition and to underscore the themes of my upcoming remarks, I request that the American flag and the State of Oregon flag be visibly displayed during the meeting. These national and **state heritage symbols** are integral to the points I plan to discuss, particularly relating to patriotism and its role in our educational system.

I am pleased to inform you that the remote location selected for this meeting and its accessibility to the public is ideal and should serve our purposes well. I will participate from the audience via my laptop, which will enable me to address the Board effectively.

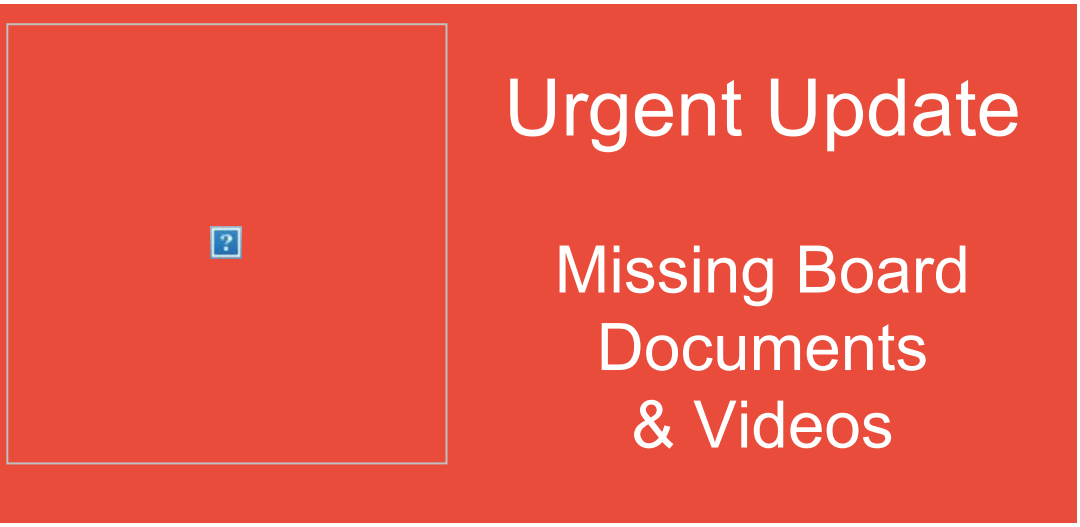
Thank you very much for considering this request. The presence of our flags will enrich our discussions and serve as a reminder of the values we strive to embody and instill through our educational endeavors.

I'm looking forward to a productive meeting.

Warm regards,

Art Witkowski

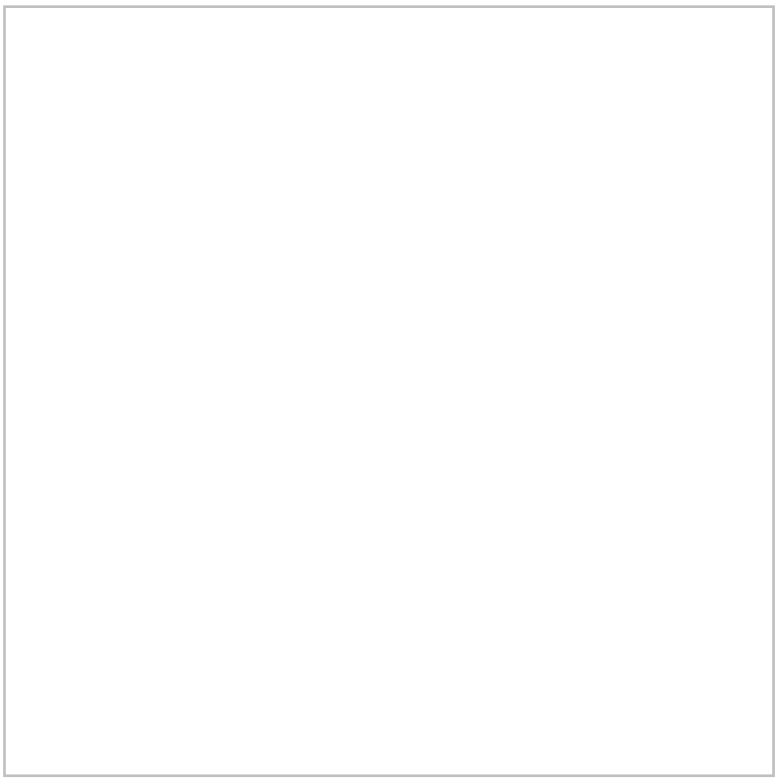
**From:** Oregon Parents" Rights
**To:** ROSENBERG Corey * ODE
**Subject:** Urgent Update: Missing Board Records & Our Next Steps
**Date:** Wednesday, April 17, 2024 9:14:46 AM




**Dear Supporters,**

As we approach the Oregon Board of Education meeting on April 18th, it has come to our attention that dozens of previously available video recordings of Oregon Board of Education meetings, along with vital documents such as agendas and minutes, have disappeared from online archives.

While we would like to attribute this to an innocent oversight, the timing and nature of these omissions raise serious questions.



[Check the Oregon Board page link for yourself]

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### Behind the Firewall: A Challenge to Transparency

The Oregon Department of Education (ODE) shields the Board of Education with a robust firewall that prevents the public from accessing essential information. These communication barriers hinder our ability to stay informed and actively participate in our children's education. Despite YouTube statistics showing dismal viewership for board meetings, the importance of these records cannot be overstated.

### What Changes Tomorrow: SB 1502 and Our Commitment

In response to these challenges, Oregon Parents' Rights will intensify its efforts to monitor and report on all Board activities. **Thanks to Senate Bill 1502**, school districts will begin posting videos of their meetings, enhancing transparency and accountability.

### Upcoming Features in Our Newsletter

- Oregon Board Meeting Breakdowns - Expect comprehensive play-by-play analyses and summaries on critical discussions and decisions.
- Oregon Rule Review: We will provide detailed summaries of new

Administrative Rules proposed or passed, keeping you informed and prepared to take action if necessary.

- Meet Your Oregon Board Members - in our upcoming editions, we'll introduce you to the Oregon Board Members. Learn about their backgrounds, their roles in shaping education policy, and how they were appointed to their positions.

- Condensed Viewing Experience - Understanding that a full day of board meetings can be overwhelming, we will condense these lengthy videos into short, easily digestible segments. We aim to highlight notable contributions from each board member at every meeting, simplifying your ability to see their involvement and perspectives.

Stay tuned, stay peaceful, and remember, it's all about improving the educational landscape for our students. Together, we will continue to advocate for transparency and accountability within Oregon's educational system.

Best regards,

Art Witkowski
Oregon Parents' Rights

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# Every Oregon Student, Every Day!

I hold dear this image that portrays all children as equals, devoid of divisiveness or offense. This image was a part of my email signature throughout my tenure at ODE, accompanying each email I sent. I hope you find it as meaningful as I do.

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**Send your comments to ODE**

Director of ODE - **Charleen Williams**
Governor's New Educational Advisor - **Racheal Moser**
Board Chairman - **Guadalupe Martinez Zapata**
ODE DEI Czar - **Carmen Urbina**

Oregon Parents' Rights | 6564 WHISPER CREEK LOOP NE, KEIZER, OR 97303

Unsubscribe corey.rosenberg@ode.oregon.gov

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Sent by arthur@oregonparentsrights.ccsend.com powered by



Try email marketing for free today!

**From:** Bryan Lee
**To:** StateBoard Public Email
**Subject:** Pledge of Allegiance
**Date:** Monday, April 15, 2024 2:22:17 PM

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> You don't often get email from bryan@stpaulfire.org. Learn why this is important

To whom it concerns,

I am writing to bring to your attention a matter of utmost importance regarding our nation's foundational values and traditions. As a concerned citizen deeply invested in the principles of patriotism and civic duty, I am urging the state to consider implementing a mandate ensuring that the Pledge of Allegiance remains an integral part of our educational system, safeguarded from any potential bans or restrictions.

The Pledge of Allegiance represents a solemn oath of loyalty and allegiance to the ideals upon which our nation was founded. It serves as a unifying force, transcending cultural, racial, and socioeconomic barriers, instilling in generations of Americans a sense of pride, unity, and reverence for our country. By reciting the Pledge, individuals of all backgrounds affirm their commitment to the values of liberty, justice, and equality for all.

In recent years, there have been instances where the recitation of the Pledge of Allegiance has come under scrutiny, facing challenges and even bans in certain educational institutions. Such actions not only undermine the fundamental principles of our democracy but also deprive students of an invaluable opportunity to connect with their heritage and foster a sense of national identity.

By mandating the continued observance of the Pledge of Allegiance in schools and public gatherings, the state can reaffirm its dedication to preserving the cherished traditions that have long defined the American experience. Moreover, it sends a powerful message to future generations that the values encapsulated in the Pledge – including liberty, justice, and unity – are not merely words but guiding principles that must be upheld and defended at all costs.

In conclusion, I urge you to take proactive measures to enshrine the significance of the Pledge of Allegiance in our educational curriculum and public life. Let us ensure that the solemn vow of allegiance to our flag and the republic for which it stands remains an enduring symbol of our shared heritage and commitment to the ideals of freedom and democracy.

Thank you for your attention to this matter.

Sincerely,

Bryan G. Lee

| | |
|---|---|
| **From:** | Camille Hammond |
| **To:** | StateBoard Public Email; peterw@osaa.org; kyles@osaa.org; kirsw@osaa.org; missys@osaa.org; kellyf@osaa.org; monicam@osaa.org; chrisb@osaa.org |
| **Subject:** | trans female runner in girls race |
| **Date:** | Wednesday, April 17, 2024 3:58:01 PM |

You don't often get email from camillehammond27@gmail.com. Learn why this is important

To Whom it may concern,

I am hopeful that I am not the only person who has emailed my concern about the policy Oregon has to accept any athlete who declares a gender to be allowed to participate in whatever sex category they choose in sports competitions. Oregon says that it prides itself on women's rights and celebrating women, but Saturdays events show me, and more importantly they show every biological teenage girl in Oregon, including my daughter who was there at the race and watched Galligar run, that fairness only runs in one direction, quite literally, and that is in the direction of a biological male. What is Oregon going to do to protect these teen girls? Most of them will not be going on to race collegiality, they run for the love of the game. And that love was stolen from them on Saturday, and it will be again and again, for the next 3 years as Galligar is only a sophomore, and beyond. While I understand Oregon wanting to treat people who identify as different than their biological gender with compassion and respect, it is absolutely absurd that this is allowed to be done at the detriment of HALF of Oregon's student population. Seeing the look on the girls faces after the 200 race and on the podium was absolutely heartbreaking. While unfortunately I don't see anything happening in Oregon, because Oregon has literally shown they don't care for biological women, by having no guidance to protect them, I feel like I would be doing my daughter a disservice to not speak out, and I hope and pray I'm proven wrong.

Sincerely,

Camille Hammond

**From:** Jamie Dozier
**To:** StateBoard Public Email
**Subject:** Keep sports separate between sexes
**Date:** Tuesday, April 16, 2024 4:32:55 PM

---

[You don't often get email from dozier.jamie@gmail.com. Learn why this is important at https://aka.ms/LearnAboutSenderIdentification ]

To Whom It May Concern,

As a child I played multiple sports all through high school and competitive soccer. I have a young daughter who I hope gets to experience the same teamwork, competition and hard work that I did. Winning big after working hard is the best feeling ever!

On any day, the average boy could have bested me in pretty much any sport. Any boys team would have annihilated us.

It is unfair to women/girls to have to compete against biological males in sports in any level. Not only will they almost certainly not win, but because the boys/men are on average stronger, bigger and faster more injuries will happen.

Please keep biological male and biologic females in separate sports so everyone can experience fair competition.

Sincerely,

Jamie Seastrom-Price

Sent from my iPhone

| | |
|---|---|
| **From:** | jenny maguire |
| **To:** | peterw@osaa.org; kyles@osaa.org; Krisw@osaa.org; missys@osaa.org; kellyf@osaa.org; monicam@osaa.org; chrisb@osaa.org; StateBoard Public Email |
| **Subject:** | OSAA Gender Identity Participation |
| **Date:** | Tuesday, April 16, 2024 5:52:09 PM |

You don't often get email from jennymaguire15@gmail.com. Learn why this is important

Oregon State Board of Education and OSAA members,

I respectfully request that you stop the insanity.

Policy 38, “Gender Identity Participation” (pg. 80) of the 2023-2024 OSAA Handbook says that your gender identity rule “promotes harmony and fair competition among member schools."

What we have seen nationwide, and last weekend in Sherwood, is the opposite of "harmony and fair competition."

***If "identifying" as something is enough to qualify "as something," what is to stop . . .***
an able-bodied person competing in the Special Olympics if they **self-identify** as disabled?
An adult from competing in high school events if they **identify** as a minor?
A boy in the 285lb wrestling weight class from **identifying** as 106lbs and demanding reclassification?

Absurd you say? Is it any less absurd than a XY identifying as a XX? *Wanting it* and *verifiably being it* are two very different things.

So where does it stop? ***If one person's self-identity trumps rules based on identifiable and verifiable traits or facts, why do we have rules and classifications at all?***

Rules are in place to promote fairness and safety. Is that not the most important thing for any athlete in any competition?

Please do your job to keep sports fair and safe. If you don't, you'll find a lot of athletes and their families taking a knee and refusing to participate or attend your events. Girls will lose competitions, state titles and scholarships. Some will be seriously injured. Is that foreseeable outcome worth perpetuating this insanity?

Do the right thing. **Stop the insanity.**

Jenny Maguire
Former Salem Keizer Public School educator

**From:** Kristin Tomlin
**To:** StateBoard Public Email
**Subject:** Remove boys from girls sports now!
**Date:** Monday, April 15, 2024 4:59:10 PM

---

You don't often get email from kristitomlin7@gmail.com. Learn why this is important

Dear OSAA and State Board of Education,

What an egregiously sick, wrong, and dangerous thing to do to allow MEN competing in womens' sports.

I was a volleyball collegiate athlete--EARNING my accolades, tuition, opportunity, and degrees with my female athletic abilities honed over 14 years in the sport. I also served as a coach of various sports and genders--seeing firsthand how DIFFERENT men and women play volleyball, sprint, play baseball and softball.

Imagine  having that opportunity ripped away by a MAN-- someone built biologically with more strength, speed, agility, a higher vertical, more power, different fast-twitch muscles--even quicker lateral and arm speed, 20% more muscle mass, a higher ability to take in oxygen for longer periods of time, quicker reflexes, and better depth perception.

This is just a START of the biological differences! What did Title 9 achieve--equal OPPORTUNITY for women in sports! We deserve the RIGHT to compete safely against females ONLY! Ban this form of cheating, mysogony, and harm against women. Ban the unfair and dangerous practice of adding non-biological women to female sports.

Protect women from harm.
Protect female athletics.
Protect female safe spaces like locker rooms, team rooms, and bathrooms.

Protect female opportunity.

This needs to happen NOW.

| | |
|---|---|
| **From:** | Lisa Shepard |
| **To:** | StateBoard Public Email; HILDEBRANDT Kate * ODE; STONEROAD Patricia * ODE; BAKER Traci * ODE; BOYD Meg * ODE; RUDY Peter * ODE; SIEGEL Marc * ODE |
| **Subject:** | Public Comment for 4/18 ODE meeting: Urgent Appeal for Fairness in Athletics |
| **Date:** | Wednesday, April 17, 2024 11:10:57 AM |

[Some people who received this message don't often get email from lisashepard143@gmail.com. Learn why this is important at https://aka.ms/LearnAboutSenderIdentification ]

Dear Kate, Patricia, Traci, Meg, Peter, Marc and the entire Oregon State Board of Education

I'm reaching out to urge the Oregon State Board of Education to address policies regarding transgender athletes in girls' sports. The current situation, exemplified by Aayden Gallagher's recent participation in the girls' races in Sherwood, raises significant concerns regarding documented goals for a "fair and safe environment for all students."

After Saturday's races, Aayden currently holds the #4 ranking in the state in the Girls' 200m and 400m. Aayden's times would rank 935th and 404th in the Boys' division in those races!

This disparity undermines fair competition. Deserving female athletes will be booted off of podiums and out of record books. In fact, going off of these current race results, Lulu Kennybrew (Benson High School) and Elizabeth Ghazi (Franklin High School) would be stripped of their opportunity to represent their district in the State 6A Championships because Aayden would take their spot.

What happens when the next transgender athlete enters a Girls' race. Or 3 more. Or 5 more. Girls will be erased from girls' sports. This trend jeopardizes the integrity of girls' athletics and contradicts the principles of fairness outlined in Title IX.

I implore the Department of Education to prioritize fairness and inclusivity for all students. While supporting transgender participation, something must be done to ensure that girls' sports remain a fair playing field.

Thank you,
Lisa Shepard

**From:** Mike Condon
**To:** StateBoard Public Email
**Subject:** Public Comment on HB4054
**Date:** Monday, April 15, 2024 10:29:01 AM

---

> You don't often get email from mikecondon@hotmail.com. Learn why this is important

Hello,

I am writing to express my concern regarding the participation of male born individuals in the female category of high school OSAA sports. While I understand the desire to be inclusive and understanding of all athletes, our genders are not something we can simply change and males have an indisputable and innate advantage when it comes to athletic competition. Allowing males, regardless of how they identify, to compete in female athletics is unfair to women and takes away their opportunities to excel. Please create protections for women to have the same opportunities for fair competition in high school sports that their male classmates experience.

Mike Condon
Previous OSAA athlete, HS Coach and father of a future HS girl athlete

| | |
|---|---|
| **From:** | Riette Steyn |
| **To:** | StateBoard Public Email; katherine.hildebrandt@state.or.us; HILDEBRANDT Kate * ODE; timothy.sell@ed.gov; STONEROAD Patricia * ODE; BAKER Traci * ODE; BOYD Meg * ODE; RUDY Peter * ODE; SIEGEL Marc * ODE |
| **Subject:** | Public Comment for 4/18 meeting: Urgent request for safe and fair competition for girls |
| **Date:** | Wednesday, April 17, 2024 3:18:59 PM |

Some people who received this message don't often get email from riette05@gmail.com. Learn why this is important

Dear Peter, Kyle, Kris, Missy, Kelly, Monica, Chris, Steve and Kathi

I want to implore you to reconsider your Gender Identity Participation policy listed in the OSAA handbook. I am specifically referring to Aayden Gallagher's recent participation in the girl's races in Sherwood.

I understand that this is a very difficult situation, having to make decisions that can possibly alter an athlete's future. For that you need a lot of wisdom. I do not envy you this.

Unfortunately you cannot please both sides, you will have to choose between protecting our girls, allowing them to compete in a fair and safe environment, something women have fought for for generations and which should be protected under Title IX, or you can choose to support transgender males who need to do nothing more than decide from one season to the next that they now identify as female.

There is no doubt that the current OSAA policy leaves room for exploitation. Nothing is defined, no standards are set in place. You are leaving room for any male to compete as a female in the next season. They do not even have to commit to transitioning or taking hormones. The fact is, boys run faster, jump higher, hit harder and perform physically better than girls. This was also proven by the fact that Aayden's time ranks as #4 in Oregon for girls, but #935 for boys for the same distance.

If an athlete wants to compete in a club, they need to compete in a certain age group. A small, short 17-year old is not allowed to compete as a 14-year old, just because his body looks like a younger athlete.

If we allow biological males to be on girls' volleyball teams, the boys can spike the ball so much faster and harder than any girl, this can, and already has, caused great harm to female athletes on the opposing team. This is a huge safety issue!

It was so encouraging to see the NAIA recently choose to protect girls sports. Please help our girls to compete in fair and safe environments and put them first! This matters because our girls matter!

Thank you.
Riette Steyn

**From:** Rob Goodwin
**To:** StateBoard Public Email
**Subject:** Public Comment: OSAA Safety Concern for Girls
**Date:** Monday, April 15, 2024 5:12:47 PM

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You don't often get email from aboutwd@gmail.com. Learn why this is important

State Board of Education Members,

My daughter competed in the OSAA "Need for Speed" track and field event last Saturday, where a male athlete was allowed to directly compete against females. Clearly this is unjust and cannot be permitted to stand. It's shameful and inexcusable. By allowing this, the OSAA (and you by extension) have failed to protect these girls from obvious and blatant sexism. Allowing a male to steal from and abuse these girls in this way is completely unacceptable.

The girls that participate in these events have worked and trained for years. Many have college aspirations on the line, only now to be cheated and stolen from by someone whom the OSAA organization failed to screen.

I will be petitioning my school district to boycott this event, as well any future event that fails to protect the safety and well being of their female participants. Please do what's right and demand the OSAA correct this problem immediately.

In short, men forcibly stealing women's wins is a direct form of violence. If this continues, a ground-swell of well deserved public outrage is guaranteed follow.

Thanks.
Rob Goodwin
Concerned Parent

**Rob Goodwin**
(503) 984.1443
Rob@AboutWD.com

**From:** Sheri Bauer
**To:** StateBoard Public Email
**Subject:** Public Comment: Boys Competing in Girls Sports
**Date:** Tuesday, April 16, 2024 1:19:43 PM

You don't often get email from sherilhancock@gmail.com. Learn why this is important

I am writing to voice my strong objection and utter astonishment at the OSAA allowing boys to compete in girls sports. I have to assume the State Education Board supports this as well or it wouldn't be happening.

**Biology Matters**
Boys have physical advantages over girls. It is for this reason we have separate sports for girls and boys. This has been common sense for decades and decades. Science backs this up - on average boys are bigger, stronger and faster than girls - and you can easily see it in the recent Sherwood Track Meet times.

Are you really comfortable and "just fine" with a boy competing and winning against girls? What about Title IX and Women's Rights. What about all the Safety Regulations you require for schools and sports - yet allow boys to compete athletically against girls putting everyone at higher risk.

What about "fairness and equity" which is thrown about all the time - what is fair and equitable about allowing a boy to steal victories from girls who have worked hard to earn their chance on the playing field.

Too many parents, teachers, administrators, coaches, athletic directors, leaders in our schools, athletic associations, government officials, schools boards and just ADULTS in general are inexplicably silent on the issue.

Shame on the OSAA and shame on the Oregon Board of Education..

To the Oregon, State Board of Education,

My name is Tim Winn and I have a history of participation in the Oregon Highschool athletic system as an Assistant Wrestling coach at Crescent Valley High School, for 12 years prior to the 2020-21 season. I have also served the local Corvallis area as the head instructor of the Corvallis Judo Club for 10 years prior to 2012, when I accepted the paid position as Crescent Valley's Lead Assistant Wrestling Coach. Although I still participated as a Judo instructor, I passed the leadership control over to a new generation of younger leaders. I graduated high school from CVHS in 1978. My love for the sport of Wrestling and the needs of my struggling high school alma mater, Crescent Valley, called me to dedicate myself to the instruction of high school athletes. In my case, Wrestling is the sport that I have the most skill and experience as an athlete and coach. I am now 64 years old and am still considering going back to the mat room as a volunteer coach again, seeing a need for guidance and counsel within a challenging environment for our young athletes. I felt it important to share this short personal background to give some frame of reference to who is offering an opinion to you folks.

I want to begin my discussion by saying how much I appreciate the work and sacrifice that you all give to the high school sports programs of Oregon. I know it's not an easy job and yet it's vital that the opportunities afforded our high school students in all sports are offered to everyone who wishes to participate. The skills and personal growth that comes from this experience cannot be duplicated inside any classroom. Thank you for all that you do and all the effort that you give to meet the challenges that come before you.

That being said, I am very disappointed to see that the issue of cross gender athletic competitors has become another challenge that you are needing to address. I suppose that it was only a matter of time before Oregon's Highschool athletic system would have this issue visited upon it. That having now been made the case and it being imperative that it is not ignored or made light of, your organization is going to need to take a position and set policy that is realistic and respectful to the overwhelming majority of all the high school athletes in Oregon. As a Wrestling coach, I had the unique experience of coaching during the transitional era when females were not only allowed to compete on male teams but were also required if they were going to compete in high school wrestling. There were not any opportunities for females to participate in a female only version of the sport. I found this to be both a ridiculous and ironic situation, as it was the only sport in which this situation existed, yet it was the most physically engaging sport that two athletes could engage in. During my coaching, I had the opportunity to coach several young women in the program at CVHS. As females became more common in the sport, I was very happy to see OSAA develop policy and structure to support the female athletes. When a formal female competition structure began to be developed, I was excited to see the opportunities for these talented and dedicated athletes be given the platform and support to be acknowledged at the level that they deserved. As you can now see, the female Wrestling programs have grown across the state. Hopefully, as female wrestlers come back to the sport as I did, to be coaches for a new generation of athletes, there will be a genesis of growth within an already growing opportunity for young women in Oregon. It would be an enormous tragedy to see all these years of forward growth as a sport be unraveled by the lack of forward-thinking policy regarding males competing against females.

It would be best if this question was never asked, but now the cat has left the proverbial bag. This issue can and has been made to seem extremely complicated, due to the emotional and psychological based points that both sides make part of their talking points. It's best to keep it all about

facts and base your policies on that alone. This issue isn't about the 1/million biological anomaly. There is the outlying exception in every circumstance that can be thought of. The fact is that there are only two human genders, Female, represented genetically by two X chromosomes, and Male, represented genetically by one X and one Y chromosome. There are distinct differences in the physical display of these different genetic combinations. Dead Stop!

We need to ask ourselves, why was Title 9 created and are we going to allow the destruction of decades of work that has been put into the development of a fair system of opportunity for our female athletes. The question should not be how to allow males to compete within the female athletic system? The appropriate question is how are we going to help males who want to compete, but are unwilling to compete within the existing male sports systems? This is a totally different discussion.

Thank you for your attention and time.

Respectfully, Timothy Winn, Corvallis, Oregon

P.S. I have also submitted this same letter to the leadership staff of the OSAA




ReplyReply allForward

Add reaction

Public Comment:

Dear Oregon State Board of Education,

I am writing to ask for the Board to pay attention to the continuing impact of COVID-19 for Oregon's students and teachers, which is intricately tied to many topics that ODE is currently facing. Despite minimizing language often used, COVID-19 continues to affect everyone, including with increased absences and with a common occurrence of developing Long COVID. COVID-19 especially impacts more vulnerable kids and educators, such as people of color and disabled people. Due to ODE's current policies, some disabled students can no longer attend school in person due to allowing COVID-positive children at school. No longer trying to prevent the spread of disease also means that more Oregon students are developing Long COVID and will have debilitating long-term and/or lifelong symptoms and conditions.

Oregon has recently informed national public health policy; Oregon's isolation policy - which it appears from public records may have been connected to no longer wanting to have children sick with COVID-19 stay home for a five day period - was a basis for the CDC's new federal isolation policy, a new policy that many public health experts have said is harmful. It is not accurate to say that isolation policies do not impact transmission, and we know that each person who stays home while infectious stops a chain of transmission to fellow classmates or teachers who will develop severe disease or Long COVID. We should be concerned that it was Oregon that contributed to a national CDC policy based in herd immunity ideas that does not follow the science, and that this may be connected to Oregon's educational policies. Oregon's present approach is making children in Oregon, and their family members, sicker, and it's denying many children equal access to their education, because they cannot safely go to school.

Please re-establish a priority and accompanying policies and approaches to reduce the transmission of respiratory diseases in Oregon's schools and provide better and more scientifically-based guidance on COVID-19 and Long COVID for families. This would include updating the Schools Communicable Disease Guidance with more effective guidance on COVID-19, including staying home when you have tested positive whether symptomatic or asymptomatic and returning when testing negative. This also could effectively include ODE creating and distributing statewide informational materials on preventing COVID and how to recognize Long COVID - something many families are struggling with as children develop sudden illness - as well as efforts to provide tools to help students and families, including the long-term free distribution of high-quality masks and easy access to vaccines and tests at school. ODE encouraging the increased development and stability of virtual school programs in districts would better help students who prefer online school to be able to access activities and services within their own school district. Please also advocate with OHA for better state isolation policies, as found in the state investigative guidelines on COVID-19, and better messaging on the continued importance of reducing COVID-19 infections as a way to protect family health and reduce Long COVID.

COVID-19 hasn't gone away; we've just averted our eyes and left the most vulnerable people to bear the outsized burden of it. Please help protect Oregon's students and improve the difficult situations that Oregonians are still currently facing as they try to access education.

A. Smith

**From:** Erin Moore
**To:** StateBoard Public Email
**Cc:** OnPoint Government Relations
**Subject:** Rule Implementation - SB3 (Personal Finance/Higher Education & Career Path Skills)
**Date:** Thursday, April 18, 2024 9:17:42 AM

You don't often get email from erin.moore@onpointcu.com. Learn why this is important

Members of the Oregon State Board of Education,

Thank you for allowing us to provide feedback on the implementation of Senate Bill 3 and the draft rules under consideration by the Board.

As an educator-founded financial cooperative, OnPoint Community Credit Union is committed to supporting the financial well-being of our 550,000 members and all Oregonians. In 2023, we volunteered more than 500 hours and invested $350,000 in financial education programming with community-based organizations, benefiting over 20,000 students of all ages. Post-class surveys consistently reveal that participants earnestly request more time dedicated to understanding the language of finance and building skills to navigate financial decision-making.

OnPoint strongly supported the work of GoWest Credit Union Association with Senator Rob Wagner and Senator Tim Knopp to advance SB3 in the 2023 legislative session. Throughout the process, educators, administrators, students, and their families, as well as community organizations and business leaders, broadly supported SB3.

We thank the Oregon Department of Education (ODE) for thoughtfully addressing the complex considerations required to shape this legislation. We understand there are complex factors that must be accounted for with any change affecting Oregon students and educators. Of the draft rule options before you today, we respectfully ask you to consider **Option B**, which provides students the greatest opportunity to successfully explore and master personal finance skills in a **stand-alone course**.

Through our engagement in the legislative process, we believe lawmakers intended a 0.5 credit in Personal Financial Education and a 0.5 credit in Higher Education and Career Path Skills, a request echoed in many comments, including written and oral testimony provided to ODE during public engagement opportunities. OnPoint is committed to offering any type of support that will help ensure the successful implementation of this essential legislation. The most recent Oregon Financial Wellness Scorecard* reports that even as Oregon households report higher income and fewer households are in poverty, Oregonians are borrowing more, and bankruptcy filings increased in 2023. More than half of respondents to a statewide survey say they have never taken any sort of class to learn how to manage money. Respondents who took a class experience less financial stress, are more likely to spend less than they earn, and express more confidence in their decision-making.

Young people with a better understanding of personal financial concepts are more likely to build their savings, make well-informed decisions about post-secondary debt, and prepare to achieve their life goals. A stand-alone class will afford students more time to master the curriculum and explore how emotional, cultural, and social factors impact their relationship with money and their future decisions.

As you consider the proposed rules, we ask that you approve **Option B**, which fulfills the goals of a personal finance class to prepare young Oregonians for the opportunities and challenges ahead of them.

With deep appreciation,

**Erin Moore** (*she/her)*
Government Relations Director | OnPoint Community Credit Union
PO Box 3750 | Portland, OR | 97208
P: 503.228.7077 Ext. 5106 | C: 971.645.3653 | 800.527.3932 | www.onpointcu.com

* https://www.oregon.gov/treasury/financial-empowerment/Documents/FEAT-Meeting%20Materials/2024/240205-FINAL-2024-Financial-Empowerment-scorecard.pdf

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| | |
|---|---|
| **From:** | Audrey K. Bailey |
| **To:** | StateBoard Public Email |
| **Subject:** | Public comment: SB 3 Implementation of Course Requirements for Personal Financial Education Correction from Oregon State Credit Union |
| **Date:** | Thursday, April 18, 2024 10:19:27 AM |
| **Attachments:** | image001.png |

Dear Oregon Department of Education Board Members,

I am writing to urge you to maintain the intent of Senate Bill 3 and keep the Personal Financial Education requirement as a standalone class. Senate Bill 3 is a huge victory for Financial Education educators like me, but especially for the many, many parents, teachers, and students who have testified to the empowerment that this education creates.

We know Oregonians need Financial Education and we must prioritize getting this right the first time. The void in our schools has existed for too long. The intent of the bill is to require this content to stand alone. We cannot allow this requirement to be something to squeeze into a class to check a box. Not only does this dilute the content, it undermines the importance of this topic for the well-being of every student.

In my role as Community Education Director at **Oregon State Credit Union**, I travel all over Oregon providing guest speaker talks, events, and free lesson plans and materials to educators who want to bring Financial Education into their classrooms.

Some may think that not requiring Personal Financial Education to be its own class will mean schools have more flexibility to blend it into relevant classes. However, I have heard from several teachers already that they are worried that without a requirement for Financial Education to be a standalone class, it will be tossed into classes like Home Room. At some schools, this is merely 25 minutes, once a week. If we do not hold the bar up to the standards we expect, I and the teachers and families I speak with about this new requirement, know that many schools will fall short of providing what our students need.

Personal Financial Education is a relevant and highly requested course for young Oregonians. We all have come together and agreed that these new requirements will create a healthier financial future for Oregonians. I urge you to ensure that we implement this transformative class correctly the first time and require it to be a standalone half credit as the intent of Senate Bill 3 expresses.

Sincerely,

Audrey Bailey
She/her
Community Education Director
(541) 714-4093
(541) 714-4179 (fax)
PO Box 306, Corvallis, OR 97339
oregonstatecu.com



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**From:** Joey Running
**To:** StateBoard Public Email
**Subject:** "Public comment: 7.B. Senate Bill 3 (2023)
**Date:** Thursday, April 18, 2024 11:00:53 AM

You don't often get email from joey.running@albany.k12.or.us. Learn why this is important

Good morning. My name is Joey Running, Personal Finance, Accounting, Economics, and Work Experience teacher from West Albany High School. I am here to support Option B, which you will hear more about in Section 7B of your agenda

The purpose of the ODE is to foster equity and excellence for every learner through collaboration with educators, partners, and communities. To increase equity in our education system, you have the opportunity to correct the error made previously when a stand-alone Personal Finance graduation requirement was removed from our requirements over two decades ago. A strong financial foundation is necessary for ALL of our learners. We know our schools with lower-income families and more BIPOC students are less likely to have stand-alone personal finance courses unless required.

When I testified last year in support of Senate Bill 3, I did so because the legislature's intent was a STAND-ALONE course for each of the two components of the bill. My 30+ years of teaching experience, very current research, AND student/former students/Family feedback support this format. Embedding this content in other courses does NOT change what Oregon is currently doing to serve students in these two curriculum areas. The Original, Option B, was presented after a robust process, of which I, and many of my business education colleagues, participated in. We hope the Original, Option B, moves forward. ODE recently assured a group of experts in a public meeting, two weeks ago, that Option B would be presented as the Final Draft. Only to find out yesterday, mid-morning, this was not the case.

Research links are provided in my written testimony, but support the following:
Equality and implementation.
As an elective, 38.5% of Oregon's students receive Personal Finance standards
46.3% do when it is an embedded course
6.6% are not receiving this critical curriculum at all
Only 8.5% of students attend a school that requires the course today vs. 53% nationally. Full list provided in written testimony, but only 25 high schools in Oregon require PF as a stand-alone course--Culver, Creswell, Sweet Home, Tillamook, and Crook County High School to name a few.

Over 60 percent of trained educators are *not* math teachers - they are teachers with other backgrounds who are trained specifically in personal financial education. The bill's intent was never to replace a required math credit, but to allow for a math credit beyond the requirements.

The numbers regarding equity on a national basis are that students are roughly 1/2 as likely to get the course if you are in a district serving predominantly Black and Hispanic students or a high %age of free and reduced lunch

As an educator on the frontline, I believe both parts of SB3 should be stand-alone courses. Student voices support this, and I hope ODE is able to listen. Across the board, having curriculum disseminated--not taught, or embedded, or checked off is an injustice to Oregon's

students and is right back where we started. Why would the legislature have passed a bill to have functionally the same results? Option A is right back where we started with Personal Finance Standards, without a required course, and no trained educators.

Students dislike advisory and would rather be in a class dedicated to teaching them about how to be successful in the real world. How do I know this? Because they testified for this bill last year, and would not have testified for Option A. Because they check in after graduating. Because their families benefit from what their students learn in class. Because they learn how to start contributing to their retirement plans sooner, they understand how to file taxes, and they understand how their behaviors and relationship with saving/spending can be affected by outside influences, and so much more. Embedding this critical content in other courses, in my opinion, is negligent (please refer to ODE's purpose to foster equity and excellence for every learner). Option A will not have the same impact on their futures as a dedicated, stand-alone course.

Again, Option A does not follow the intent of the passed bill. Option A is a do-nothing rule. It is my hope, that you will listen to the students, the trained teachers, their families, personal finance experts, research, and do what is best for students as is the purpose of the Oregon Department of Education. Adopt Option B.

Please find links to supporting research and other concerns in my written, submitted testimony.

https://www.ngpf.org/blog/advocacy/unique-insights-ngpf-annual-report/
Pages 6-8 reference **implementation and equality**. As an educator on the frontline, I believe both parts of SB3 should be stand-alone courses. Student voices support this, and I hope ODE is able to hear them. I understand there are some exemplary "advisory" sections or other courses that can serve as examples, but across the board, this format of delivering curriculum is ineffective. Having a curriculum disseminated, not taught, embedded, or checked off is an injustice to Oregon's students.
* Latest data from 2024 State of Financial Education report shows how uneven this course is being taught in Oregon:

- Only 8.5% of students attend a school that requires the course today vs. 53% nationally. Only 25 high schools.
- Here's the list and you can pick out which ones are high-income neighborhoods or rural (as we have seen discontent from rural districts who are surprised to hear that it can actually happen in rural schools and is happening)
    - Astoria Senior High School
    - Tillamook High School
    - North Valley High School
    - Riddle High School
    - Philomath High School
    - North Douglas High School
    - Dallas High School
    - Monroe High School
    - Yoncalla High School
    - Willamette High School
    - Creswell High School
    - Rainier Jr/Sr High School

St Paul High School
- Cascade Senior High School
- Scappoose High School
- Scio High School
- Stayton High School
- Silverton High School
- Sweet Home High School
- Ridgeview High School
- Culver High School
- South Wasco County High School
- Crook County High School
- Monroe School
- Ontario High School

**Math**: Personal Finance is NOT a math course. The legislature's intent in offering a math credit was NOT for any of the required math credits that are necessary for graduation; it was to provide the opportunity for math teachers to also become trained to teach Personal Finance. That is exactly what will happen if this curriculum is "embedded" into other courses. Research, again, is strong that the Personal Finance standards will not be the main focus and students will be more concerned with the algebraic/statistics of this Math105 course that I am hearing will be one of the Math plus two requirements.

*Australia: https://financialbasics.org.au/wp-content/uploads/2023/01/FBF-Financial-Literacy-of-Young-Australians-March-2022.pdf*

*It's letter c) in key findings: ) For many students, Maths is not the most effective curriculum area for learning about personal finance. Maths tends to result in students fixating on formulas and calculations without understanding the underlying concepts. Many students also dislike Maths, resulting in more disengagement.*

The intent of SB 3 was not to make this a math class (or any other type of class) or become a required math class (or any other type of credit) at the expense of other opportunities for kids who need more math for their future. The language written in *was* intended to allow this to count for a math credit if schools chose to do that, or for a social sciences credit, or for an elective credit, or for a CTE credit, depending on how a district planned their schedules and what classes their students needed. It was to allow a stand-alone personal finance course to satisfy any of these credits, and to leave it up to districts to decide which/how/etc. The intention *was not* to allow other classes that are not specific personal finance courses to satisfy the new personal finance requirement.

**Embedding**: Carly Urban's research out of Montana...Three takeaways from Dr. Carly Urban's recent paper, "High school financial education courses in the United States.: What is the importance of setting state policies?" in @Journal of Financial Literacy and Wellbeing (thanks to Dr. Annamaria Lusardi for taking the lead to start this new journal!).

* Embedding #personalfinance in another course does not guarantee students will actually get access; standalone courses are the only way to guarantee it: "In states where personal finance graduation requirements allow for embedding in another class or content area, only 39 percent of students are in schools with personal finance content required. On the contrary, students in states in which personal finance is required as a standalone class have universal access to personal finance material."

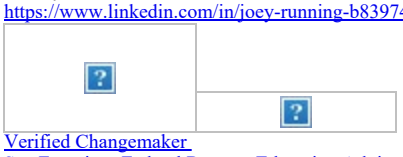
* School-level compliance with state policies requiring a personal finance course is extremely high: "The top panel shows that state policies requiring every student to complete a standalone personal finance course prior to high school graduation have nearly universal compliance (the states in dark red)."

* Multiple factors influence access to financial education: "Many factors help to predict access to financial education: rural schools are more likely to have required personal finance; schools with higher fractions of non-White students are less likely to have required personal finance; schools with close geographic neighbors are more likely to adopt the personal finance coursework of their neighbor, particularly in urban areas."

Thanks to Dr. Urban and her research team for combing through more than 10,000 high school course catalogs to develop the most complete picture of access to financial education in U.S. high schools. This research has been key to advocacy efforts by the Next Gen Personal Finance (NGPF) Mission 2030 Fund, leading to 17 states, in the past 3 years, passing laws/policies to guarantee personal finance courses to high schoolers. Thank you!

Here is the link: https://www.cambridge.org/core/journals/journal-of-financial-literacy-and-wellbeing/article/high-school-financial-education-courses-in-the-united-states-what-is-the-importance-of-setting-state-policies/ABD577136362C0289884C41676341271

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April 17, 2024

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

**Re**: Standards for Approved Recovery Schools

Chair Martinez Zapata, Vice-Chair Scurlock, Second Vice-Chair Montgomery, and members of the Board,

The Oregon Recovery High School Initiative is thrilled to write in support of the proposed rules for the Standards for Approved Recovery Schools. The Oregon Recovery High School Initiative (ORHSI) was instrumental in commissioning and championing the policy concept developed into House Bill 2767 (2023), which established the creation of Approved Recovery Schools within the Oregon Department of Education. ORHSI is thrilled to see the speedy, collaborative effort with which this rulemaking process has moved forward. As the organization that established Oregon's first high school exclusively for students impacted by substance use disorders, ORHSI is proud to see the dream we once had — ensuring access to free and recovery-focused education for kids in every corner of our state — become a reality.

In conjunction and collaboration with a highly specialized team of professionals on the Recovery Schools Advisory Committee, ODE's proposed rules seem to capture the nature of the intent of House Bill 2767 — that approved, state-funded recovery schools be public entities designed to help students with substance use disorder achieve their high school diplomas while having simultaneous access to the behavioral health services they need to survive and stay in recovery.

It is essential that students in recovery have the choice to attend an approved recovery school, rather than attend as a mandatory placement, and we are pleased to see that this intent remains intact both in the statute and in the proposed rules before the Board. It is also essential that the state has a flexible definition and understanding of what it means to be in recovery, recognizing that not all students have access to treatment services or medical diagnostic services that might — but can't always — accompany substance use disorder.

ORHSI is also pleased to see the implementation of multiple or satellite campuses for an approved recovery school, as this will help smaller and more rural communities build out capacity that reaches beyond one single location or building. It is our hope that one day, all students who need it will have access to the recovery-focused education that they deserve. We see this as an essential component to making that goal a reality.

As ODE begins funding approved recovery schools, we strongly urge for the continued attention to the funding formula and financial reporting process for these schools. We want to emphasize the importance of funding these schools at the true cost of care for each student, recognizing the complicated nature of funding schools whose enrollment fluctuates throughout the year. The legislative intent of HB 2767 requires that ODE fund each school with a combination of dollars from the State School Fund and the Statewide Education Initiatives Account, and that the combination of those dollars shall pay the difference between:

> "(a) The actual cost for providing education to students at the approved recovery school; and (b) The amounts received for providing education to students at the approved recovery school from allocations made from the State School Fund under subsection (2) of this section."

HB 2767 also instructs the department to "collaborate with the Oregon Health Authority, the Youth Development Division, the Alcohol and Drug Policy Commission, the Oregon Youth Authority, the Department of Human Services and local public health and mental health authorities or providers and shall coordinate,

to the greatest extent practicable, funding of services provided in relation to approved recovery schools," and we hope to see collaborative, cross-agency funding strategies explored more closely over the coming months, as outside health care or behavioral health resources could be utilized to ensure each approved recovery school is operating at its full potential.

Lastly, ORHSI is grateful for the speed, thoughtfulness and efficiency that ODE has brought to the implementation process for HB 2767. The collaboration and commitment to this process at the newly established Department of School Choice, Options, and Recovery Education at ODE is commendable, and we hope to see ODE achieve its ambitious goal of opening up RFPs and onboarding approved recovery schools into this program this biennium.

Thank you,

Oregon Recovery High School Initiative
Ann Highet, Chair
Tony Mann, Vice-Chair

# Oregon State Board of Education
# April 18, 2024
AGENDA ITEM: 3.A.

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| **SUBJECT:** Safe School Culture Grant - SB 283<br>**ODE STAFF:**<br>Carmen Xiomara Urbina, Deputy Director, ODE<br>Michael Elliott, Director of School Facilities, Office of Finance & Information Technology<br><br>SB 283 (2023) directs the Department to distribute funds under the Safe School Culture Grant to school districts and education service districts in the manner prescribed by the State Board of Education by rule. This agenda item includes the 1st reading of the proposed permanent rule for the distribution of these grant funds. The permanent rule would replace the temporary rule for this grant, which the Board adopted in October 2023.<br><br>☒ New Rule<br>☐ Amend Existing Rule<br>☐ Repeal Rule | ☐ **First Reading**<br>☐ **Presentation**<br>☐ **No Presentation**<br>☒ **Action**<br>☐ **Temp Rule**<br>☐ **Presentation**<br>☒ **No Presentation** |

**BACKGROUND**

In the 2023 session, the Legislature passed Senate Bill 283, which contains several programs and law changes to support the educator workforce. One of the programs contained in the legislation is the Safe School Culture Grant. The purpose of the grant is to "Develop a network of instructors who are certified in nonviolent crisis intervention methods to ensure that, for every 50 students in a school district or an education service district, at least one staff person of the school district or education service district is certified in nonviolent crisis intervention methods."

SB 283 specifies that:

Grant funds cover the following costs for participating districts and ESDs:

- Wages or stipends paid to staff attending training to become newly certified instructors. Reimbursement should be limited to the costs associated with newly certified individuals who successfully complete the certification process as newly certified instructors.
- Any unexpended moneys from grants to be used to support the costs of training district or ESD staff in nonviolent crisis intervention methods by providing stipends and reimbursement for the cost of materials.

To qualify for a grant, a district must:

- Require each newly certified instructor to conduct at least 3 trainings of at least 10 staff persons each year.
- Provide or arrange for the provision of physical space for the training
- Consult with organizations representing teachers and instructional assistants:
    - To determine the priority for training staff to ensure training is targeted to the areas in most need of support for increasing the safety of students and staff

    - About compensation in wages, stipends or other means to support staff to participate in training to become certified instructors or to participate in training conducted by certified instructors
- Meet reporting requirements

To qualify for a grant, an education service district must:

- Ensure at least one complete nonviolent crisis intervention training of at least 10 staff persons is completed each month at the verbal intervention level or the physical intervention level
- Provide or arrange for the provision of physical space for the training
- Not charge a fee to a district or a staff member for the first 10 staff persons trained by certified instructors each year
- Offer training in advanced physical skills only to individuals working in settings in which serious injuries have occurred or are at imminent risk of occurring.
- Meet reporting requirements

The allocation of funds to school districts and ESDs participating in the program is as follows *(includes matching requirements):*
School Districts:

- Districts with 1,500 or fewer students can receive reimbursement for one new certified instructor, If the District pays for a 2nd certified instructor, the grant will pay for the cost of a 3rd certified instructor.
- Districts with 1,501 – 5,000 students can receive reimbursement for 2 new certified instructors. If the district pays for a 3rd certified instructor, the grant will pay for a 4th certified instructor.
- Districts with 5,001- 8,000 students can receive reimbursement for the cost of 2 new certified instructors. Grant will match the cost of up to 4 additional new certified instructors.
- District with 8,001 – 15,000 can receive reimbursement for the cost of 4 new certified instructors Grant will match the cost of up to 8 additional new certified instructors.
- Districts with 15,001 – 30,000 students can receive reimbursement for the cost of 6 new certified instructors Grant will match the cost of up to 14 additional new certified instructors.
- Districts with more than 30,000 students receive reimbursement for the cost of 6 new certified instructors. Grant will match the cost of up to 16 additional new certified instructors.

ESDs

- Two new certified instructors in advanced physical skills and one new certified instructor in verbal and physical intervention skills. Grant will match the cost of up to 4 new certified instructors trained in advanced physical skills. Grant will match the cost of up to 2 new certified instructors trained in verbal and physical skills.

Charter Schools are included in this grant because of ORS 338.155(9)(b). Charter school allocations will follow the same requirements as the district allocations.

As noted above, SB 283 includes most requirements for the grant program. The legislature, however, directed the State Board of Education to adopt rules to determine the method of distributing funds to school districts and ESDs, rather than providing the specific method in the bill.

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**SUMMARY OF PREVIOUS BOARD ACTION**

Yes, the Board adopted a temporary rule for the Safe School Culture Grant in October. This proposed permanent rule is the same as the currently adopted temporary rule. It was first read at the Board's March 14th meeting.

**HAS THE RULE CHANGED SINCE LAST BOARD MEETING?**

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

**POLICY ISSUE OR CONCERNS**

**Does this proposed rule fulfill the rulemaking requirements for this grant under SB 283?**
Yes, pursuant to SB 283, the State Board of Education must adopt rules for the distribution of these funds under the program to school districts and education service districts that, *at a minimum*:

- Establish the manner by which reimbursement is provided to school districts and education service districts for wages or stipends paid to staff for the time spent by the staff to attend training to become certified instructors; Ensure school districts and education service districts are reimbursed only for the costs related to individuals who complete the certification process as newly certified instructors; and
- Permit any unexpended moneys from grants to be used to support the costs of training staff in nonviolent crisis intervention methods by providing stipends and reimbursement for the cost of materials.

To address these minimum requirements, the proposed rule:

- Defines: "Cost per Instructor; Initial Instructors; Small District Floor; State Match Instructors; Stipend; Student; Charter Schools;
- Prescribes the allocation method for the Instructor Training Costs, including estimated cost of course, stipends and other related costs;
- Prescribes the allocation method for Remaining Grant Funds for costs associated with in-house training of staff by school districts, charter schools and ESDs; and
- Permits the use of 3% of the grant funds for ODE administrative costs, as provided in SB 283.

This distribution method will allow the Department to provide "up front" grant allocation estimates to school districts, ESDs, and charter schools so they can know in advance how much funding they have available to certify staff to be new instructors and to provide "in-house" trainings. The Department has

found that providing districts and schools with these allocation amounts, rather than just waiting for each district to request reimbursement, encourages more participation in the program. It also supports equity because it sets aside funding for each district rather than doing a "first come, first serve" method which advantages districts with the most resources. Districts and charter schools will still need to meet the requirements of the program to receive the actual reimbursement from their "set aside" allocation.

**Does the proposed rule add any other provisions beyond the minimum requirements?**
Yes, the proposed rule adds the following items to the minimum distribution requirements:

- Adds a small school floor for the allocation amounts for districts.
- Adds public charter schools as an eligible recipient.
- Requires the training programs to be approved pursuant to OAR 581-021-0563 to qualify for reimbursement.

**What is the process for approving training programs pursuant to OAR 581-021-0563?**
The bill names Crisis Prevention Institute's (CPI's) Nonviolent Crisis Intervention program or "another program administered by a nationally recognized organization that provides training to certify individuals in nonviolent crisis intervention methods" as eligible to certify instructors.

ODE has an established list of Approved Restraints and Seclusion Training Programs

- The list was developed in accordance with ORS 581-021-0563
- It includes CPI and other programs administered by a nationally recognized organization that provides training to certify individuals in nonviolent crisis intervention methods.
- Using the already established list is the most expeditious way to determine which organizations meet the requirement of SB 283 for reimbursement purposes.

**Why are Public Charter Schools included in the rules if SB 283 only mentions school districts and ESDs?**
ORS 338.155 allows public charter Schools to apply for any grant that is available to school districts or non-chartered public schools from the Department of Education. As such, under the proposed rule, public charter schools are treated the same as school districts.

**Has the agency provided an opportunity to receive feedback on this proposed rule?**
ODE staff has requested input from the field via email. We have met three times with the Rules Advisory Committee and have held two office hour meetings with potential grantees.

## EQUITY IMPACT ANALYSIS

The Department approves training programs under OAR 581-021-0563 that are designed to include protecting and uplifting students with disabilities, BIPOC students and students from other historically underserved groups. These examples vary between vendors, but the curricula do contain inclusive practices within their training modules. For example:

- Programs include modules that educate instructors about different cultures, traditions, and communication styles within various communities. This knowledge helps instructors understand and respect the diversity among their students, fostering a more inclusive learning environment.

- Implicit Bias Awareness: Instructors typically receive training to recognize and address their own implicit biases. Acknowledging biases is a crucial step in ensuring fair treatment of all students, regardless of their racial or ethnic backgrounds.
- Trauma-Informed Approaches: BIPOC students may have experienced racial trauma. Training programs do incorporate trauma-informed approaches, teaching instructors to recognize signs of trauma and respond with empathy and support.
- Inclusive Language and Communication: Programs emphasize the importance of using inclusive language and communication techniques that respect students' identities. Instructors are taught how to avoid microaggressions and create educational atmospheres where all students feel valued.

The programs not only focus on these aspects in theory but usually also provide practical examples, case studies, and scenarios that are relevant and specifically address challenges faced by students in educational settings -- working to create a more inclusive and supportive educational experience for everyone, regardless of their racial or ethnic background. In addition to this analysis, the Department intends to include a requirement in the grant agreements for this program that require grant recipients to use training organizations that meet the equity practices as outlined above.

**FISCAL ANALYSIS**

See explanation of the funding distribution method above.

**EFFECT OF A "YES" OR "NO" VOTE**

N/A – First Read

**STAFF RECOMMENDATION**

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

**ATTACHMENTS**

Attachment 1: OAR 581-017-XXXX Safe School Culture Grant: Distribution Formula
Attachment 2: Senate Bill 283 Sections 8-12
Attachment 3: **581-017-0283** Safe School Culture Grant

581-017-0283 Safe School Culture Grant

(1) The following definitions will be used in this section:

(a) “Cost per Instructor” is the maximum amount of grant funds, as determined by the Department, provided to reasonably cover the costs of each instructor certification course reimbursed by the Department.

(b) “Initial Instructors” is the number of individuals training to become instructors that will be reimbursed by the Department regardless of any matching funds from the individual school district or ESD.

(c) “Small District Floor” is the minimum grant amount, as determined by the Department, that shall be provided to school districts and charter schools from Remaining Grant Funds.

(d) “State Match Instructors” is the maximum number of additional individuals training to become instructors that will be reimbursed by the Department assuming school district and ESD maximum matching amounts.

(e) “Stipend” is a set amount of funds, as determined by the Department, which will reasonably cover the costs of wages, stipends, travel, and other costs related to an individual attending an instructor training course.

(f) “Student” shall be calculated by the latest annual Average Daily Membership available to the Department.

(g) “Charter School” is a public charter school as provided in ORS 338.005

(2) The Department shall first allocate the Safe School Culture Grant funds to cover the Cost per Instructor training as follows:

(a) The Department shall subtract three percent of the Safe School Culture Grant funds for Department administrative costs.

(b) The number of Students shall be determined for each school district and public Charter School.

(c) The number of Initial Instructors for each school district, Charter School, and ESD shall be calculated pursuant to SB 283 (Oregon Laws Chapter 592, Sections 8 to 12, 2023).

(d) The number of State Match Instructors shall be calculated for each school district, Charter School and ESD, pursuant to SB 283 (Oregon Laws Chapter 592, Sections 8 to 12, 2023).

(e) The Cost Per Instructor shall be determined for each type of Instructor.

(f) The Department shall calculate the Total Course Costs by adding the Initial Instructors to the State Match Instructors and multiplying the total by the Cost Per Instructor.

(g) The Department shall calculate the Total Related Costs by multiplying the total of the Stipend amount plus any other related costs as determined by the Department to the total of Initial Instructors plus State Match Instructors.

(h) The Department shall calculate a Total State Grant Cost per school district, Charter School, and ESD by adding the Total Course Costs to the Total Related Costs.

(i) The Department shall sum all Total State Grant Costs for each school district, Charter School, and ESD to get the Statewide Training Costs.

(j) The Department shall calculate Remaining Grant Funds by subtracting Statewide Training Costs from the Safe School Culture Grant funds. The Department shall add to that amount any funds not expended by the school districts, ESDs, and Charter Schools in training staff to be certified instructors.

(3) The Department shall distribute Remaining Grant Funds to be used for training of staff by school districts, Charter Schools and ESDs, as calculated in (2)(i) above as follows:

(a) Determining an amount to be distributed to each ESD in the state.

(b) Dividing the Remaining Grant Funds by total number of Students in the state to get a Funds per Student amount.

(c) Multiplying the number of Students in each school district, and Charter School by the Funds per Student to get a District Grant.

(d) If a District Grant is less than the Small School Floor, then the District Grant will be increased to the Small School Floor.

(e) Calculate the Adjusted Remaining Funds by subtracting from the Remaining Grant Funds the total amount provided to ESDs and the statewide total of the difference after subtracting District Grants from the Small School Floor for those District Grants less than the Small School Floor.

(f) The Adjusted Remaining Funds will be divided by the total number of Students in the state to get the Adjusted Funds per Student amount.

(g) The Adjusted Funds per Student shall be multiplied by the number of Students in a school district, and Charter School to provide an Adjusted Allocation for each school district and Charter School.

(h) Those school districts and Charter Schools that still receive less than the Small School Floor, will have their allocations increased to the Small School Floor.

(4)  All calculations by the Department shall be final. The Department may republish allocations to correct errors or omissions as the Department determines in its sole discretion.

(5) To qualify for reimbursement, the instructor certification courses must be administered by programs that are:

(a) Nationally recognized organizations that provides training to certify individuals in nonviolent crisis intervention method; and

(b) Approved training programs pursuant to OAR 581-021-0563;

**DRAFT CREATED BY: AM 12/05/2023**

**581-021-0026 Examination of Children Instructed by Parent, Legal Guardian or Private Teacher**

(1) The following definitions and abbreviations apply to OAR 581-021-0026 unless otherwise specified within the rule:

(a) "Approved Tests" Tests approved for assessment of satisfactory progress by home school students are the two most recent versions of the following tests;

(A) Terra Nova CAT 3 Test;~~California Achievement Test~~

~~(B) Comprehensive Tests of Basic Skills;~~

(B~~C~~) Iowa Tests of Basic Skills/Tests of Achievement and Proficiency;

~~(D) Metropolitan Achievement Battery;~~

(C~~E~~) Stanford Achievement Test Battery.

(b) "Child" means a person between ages 6 and 18 whose parent or parents seek exemption from compulsory school attendance under ORS 339.030(1)(e). A child is considered to be six years of age if the sixth birthday of the child occurred on or before September 1 immediately preceding the beginning of the current school term. A six-year-old is assumed to be a kindergartner, unless the parent wishes to place the child in a higher grade.

(c) "Education Service District" means the education service district that contains the school district of which the child is a resident.

(d) "Department" means the Oregon Department of Education;

(e) "Neutral person" means an individual selected by the parent or guardian of the child to be taught at home who has no relationship by bloodline or marriage to the child;

(f) "Notification" means written notice containing:

(A) The child's and the parent's name, address, telephone number (optional), and e-mail address (optional);

(B) The child's birth date; and

(C) The name of the school the child is presently attending, or last attended, or if child has not attended school, the name of the public school district in which the child resides.

(g) "Order" means to provide formal written notice.

(h) "Parent" is the natural parent or legal guardian of a child whom the parent desires to be exempted from compulsory attendance under the provisions of ORS 339.030(1)(c) or (1)(d).

(i) For the purposes of OAR 581-021-0026 only, "Qualified person" is an individual who:

(A) Holds a current personnel service license or teaching license from Oregon Teacher Standards and Practices Commission; or

(B) Has been licensed by the Oregon Board of Psychologist Examiners; or

(C) Has met the publisher's qualifications for purchase, and has purchased at least one test from the list set forth in section (1)(a) of this rule; or

(D) Provides evidence of satisfactory completion of a graduate course in which test administration and interpretation is included in the objective; or

(E) Has previously qualified as a tester pursuant to paragraph (1)(i) of this rule, and has during the previous year administered at least one test from the list set forth in section (1)(a) of this rule.

(j) "Superintendent" is the executive officer of the education service district (ESD).

(2) The State Superintendent and the Oregon Department of Education shall make available a list of the test publishers and their addresses.

(3) The Department shall make available a list of persons qualified to administer tests under this rule, such list to be updated by July 1 of each year. To be placed on the list, an applicant shall submit to the State Superintendent of Public Instruction evidence that satisfies any one of the requirements stated in subsection (1)(i)(A) through (E) of this rule.

(4) When a child is taught or is withdrawn from a public or private school to be taught by a parent, legal guardian or private teacher, as provided in ORS 339.030(1)(c) or (d), the parent, legal guardian or private teacher must notify the education service district in writing within 10 days of such occurrence. In addition, when a child who is taught by a parent, legal guardian or private teacher moves to a new education service district, the parent shall notify the new education service district in writing within 10 days of such occurrence of their intent to continue home schooling.

(a) The ESD must acknowledge in writing receipt of any notification from a parent, legal guardian or private teacher within 90 days of having record of such notification.

(b) The ESD must also notify at least annually, school districts of home schooled students who reside in the school district.

(5) Children in grades 3, 5, 8, and 10, being taught as provided in section (4) of this rule, shall be examined no later than August 15 in accordance with the following procedures:

(a) The parent or legal guardian shall select an examination from the list of approved tests provided in subsection (1)(a) above and arrange to have the examination administered to the child by a neutral qualified person as defined in subsections (1)(e) and (i) above.

(A) If the child was withdrawn from public or private school, the first examination shall be administered to the child at least 18 months after the date on which the child was withdrawn from public or private school.

(B) If the child never attended public or private school, the first examination shall be administered to the child prior to the end of grade three.

(b) The person administering the examination shall:

(A) Score or provide for the scoring of the examination; and

(B) Report the results of the examination to the parent or legal guardian.

(c) Upon request of the superintendent of the education service district, the parent or legal guardian shall submit the results of the examination to the education service district.

(6) Testing for grade levels 3, 5, 8, and 10 shall occur in the third, fifth, eighth, and tenth year ending August 15. The first year is defined as when the child is seven on September 1, or earlier at the parent's discretion.

(7) Test score results shall be evaluated as follows:

(a) If the composite test score of the child places the child below the 15th percentile based on national norms, the child shall be given an additional examination within one year of when the first examination was administered.

(b) If the composite test score of the child on the second examination shows a declining score, then the child shall be given an additional examination within one year of when the second examination was administered and the superintendent of the education service district may:

(A) Allow the child to continue to be taught by a parent, legal guardian or private teacher; or

(B) Place the education of the child under the supervision of a person holding a teaching license who is selected by the parent or legal guardian at the expense of the parent or legal guardian.

(c) If the composite test score of the child continues to show a declining score, the superintendent of the education service district may:

(A) Allow the child to continue under the educational supervision of a licensed teacher selected by the parent or legal guardian, at the expense of the parent or legal guardian, and require that the child be given an additional examination within one year of when the last examination was administered;

(B) Allow the child to be taught by a parent, legal guardian or private teacher and require that the child be given an additional examination within one year of when the last examination was administered; or

(C) Order the parent or legal guardian to send the child to school for a period not to exceed 12 consecutive months as determined by the superintendent.

(d) If the parent or legal guardian of the child does not consent to placing the education of the child under the supervision of a licensed teacher who is selected by the parent or legal guardian, then the superintendent of the education service district may order the child to school for a period not to exceed 12 consecutive months as determined by the superintendent.

(e) If the composite test score of the child on an examination is equal to or greater than the percentile score on the prior test, the child may be taught by a parent, legal guardian or private teacher and for the next examination be examined pursuant to subsection (5) of this section.

(8) Procedures for homeschooling students with disabilities are set out in OAR 581-021-0029.

(9) A test administrator shall certify that the administrator is qualified and neutral as defined in this rule with respect to a child being tested.

(10) All costs for the test instrument, administration, and scoring are the responsibility of the parent.

(11) The parent of a child who turns six after September 1 shall not be required to provide notice of intent to home school that child until the beginning of the next school year.

(12) Violation of ORS 339.020 or the requirements of 339.035 is punishable as set out in 339.990.

Statutory/Other Authority: ORS 339.030 & 339.035

Statutes/Other Implemented: ORS 339.035

# Oregon State Board of Education
# April 18, 2024
AGENDA ITEM: 3.B.

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|---|---|
| **SUBJECT:** Update to Approved Homeschool Test List, OAR 581-021-0026<br>**STAFF NAME & OFFICE**: Annie Marges, Director's Office<br><br>The approved list of tests for homeschooled students needs to be updated. Two of the tests are no longer available, and two were merged into a new test. We propose to bring the rule up to date to reflect what is available for homeschool testers.<br><br>☐ New Rule<br>☒ Amend Existing Rule<br>☐ Repeal Rule | ☐ **First Reading**<br>☐ **Presentation**<br>☐ **No Presentation**<br>☒ **Action**<br>☐ **Temp Rule**<br>☐ **Presentation**<br>☒ **No Presentation** |

**BACKGROUND**

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

OAR 581-021-0026 provides information for homeschooling families regarding required periodic testing (at the end of grades 3, 5, 8, and 10), as well as a list of tests approved by the State Board of Education. The list of approved tests has not been updated for years and contains incorrect information. ODE proposes that the list be updated to reflect what is currently available.

Statute directs the State Board of Education to approved tests for the purpose of homeschool testing, it does not mention the maintenance of that list.

ODE has engaged ESD homeschool liaisons, as well as homeschool testers – the testers noticed the outdated list first, having tried to purchase tests that were no longer available. This proposed update to the rule will not affect the testing process.

**SUMMARY OF PREVIOUS BOARD ACTION**

1. This item was First Read by the Board at their February 15th meeting.

**HAS THE RULE CHANGED SINCE LAST BOARD MEETING?**

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

# Oregon State Board of Education
# April 18, 2024
AGENDA ITEM: 3.B.

## POLICY ISSUE OR CONCERNS

This proposed rule change does not functionally change anything, and therefore has no discernable impact on any group. Updating the rule would bring alignment between the rule and what is already true, and which tests are available.

## EQUITY IMPACT ANALYSIS

In Oregon, homeschooling exists outside of the public system and ODE does not collect student-level data on homeschooled students, therefore, an equity analysis is difficult at best. That said, this proposed rule change would not have an impact on any group.

## FISCAL ANALYSIS

There is no fiscal impact for the Oregon Department of Education.

## EFFECT OF A "YES" OR "NO" VOTE

If the Board approves the rule change, the list of tests approved for homeschool testing will match what is available.

If the Board does not approve the proposed rule change, homeschool testers will continue to be confused by the list currently in rule.

## STAFF RECOMMENDATION

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

## ATTACHMENTS

Attachment 1: Proposed changes to OAR 581-021-0026

# Oregon State Board of Education
# April 18, 2024
AGENDA ITEM: 3.C.

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|---|---|
| **SUBJECT:** OAR 581 015 2280: Process for Approval of Private School or Preschool as a Contractor with Public Agencies<br>**STAFF NAME & OFFICE**: Allyson McNeill and Rae Ann Ray, Office of Enhancing Student Opportunities (OESO)<br><br>The Oregon Administrative Rule 581-015-2280 contains the process for approval of private alternative schools to contract with public agencies. OESO would like to adjust the timeline for approval within this OAR to reduce duplication of effort for private schools, remove timeline barriers, remove dates, and to clarify the language explaining the timeline.<br><br>☐ New Rule<br>☒ Amend Existing Rule<br>☐ Repeal Rule | ☐ **First Reading**<br>☐ **Presentation**<br>☐ **No Presentation**<br>☒ **Action**<br>☐ **Temp Rule**<br>☐ **Presentation**<br>☒ **No Presentation** |

**BACKGROUND**

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

1. History:
    a. What prompted the rule (why do we have it?) State law? Federal law? Incident? Why are changes/amendments being proposed?
        i. Allowing school district IEP teams to place children in private alternative school settings has a long history. As per OAR 581 - 015 -2280, private alternative schools must complete an application process with Oregon Department of Education (ODE), also known as the "Department," to provide special education services. The Office of Enhancing Student Opportunities (OESO) collaborates with the private alternative schools to complete the approval on a particular timeline.
        ii. The current timeline for initial and renewal of approval requires private school to complete the process with a sometimes-unattainable short timeline for renewal and on specific dates.
        iii. OESO would like to adjust the timeline for approval within this OAR to reduce duplication of effort for private alternative schools, remove timeline barriers, remove specific dates, and to clarify the language explaining the timeline.
    b. What is the current requirement in rule or statute?
        i. The current timeline for initial and renewal of approval requires private alternative schools to complete the process with a sometimes-unattainable short timeline for renewal and on specific dates.
        ii. Example of timeline change: Currently, under this OAR, if a private alternative school applies for approval to provide special education in March 2024, they would be expected to "reapply" August 2024.
        iii. To review exact language changes, please see the attached rule language
    c. Why is this rule being brought forward right now?

i. Changing the timeline and removing specific dates will ease the burden on private alternative schools and help reduce duplication of effort.
ii. Amending the existing rule will help ensure that students who qualify for special education that attend private alternative schools will receive special education services in a timely and efficient manner.

2. Purpose
    a. What function does the current rule hold?
        i. The Oregon Administrative Rule 581-015-2280 is the process for approval of private alternative schools to contract with public agencies.
        ii. The Application and Review section of this OAR outlines the application process and the steps, such as: the documentation and information these institutions need to provide, as well as the review and evaluation process conducted by the ODE to determine their eligibility.
        iii. This rule impacts children eligible to receive special education services whose needs for services and supports cannot be provided in the public school and who are placed by a school district into a private alternative school setting.
    b. How long has the rule been in place?
        i. This rule originated in 1978 and was updated with IDEA revisions and renumbered in 2007.
3. Does the board have any areas of discretion or is this strictly mirroring statute?
    a. Yes, the Board could suggest an alternative approval timeline to the one being proposed in this docket.
4. Stakeholder voice/input (individual and collective i.e., groups)
    a. Who was involved in bringing this to the Board?
        i. Office of Enhancing Student Opportunities (OESO) of ODE
        ii. Allyson McNeill, ODE OESO, Director of Resource Management and Operations
        iii. Rae Ann Ray, ODE OESO, IDEA General Supervision Specialist
    b. What did engagement in this process entail?
        i. In addition to a Smartsheet survey and ongoing consultation with Annie Marges, ODE SCORE, Alternative Education Options Specialist, Engagement Sessions were held for these groups:
        ii. Private Alternative School Leaders of Oregon
        iii. Special Education Directors of Oregon
    c. Who may be affected by this?
        i. Private Alternative Schools who need to provide special education services.
        ii. Students who are eligible for Special Education services attending Private Alternative Schools
        iii. School Districts who place a student eligible for Special Education in a Private Alternative School
    d. Whose voice is missing potentially?
        i. Key decision makers relevant to this OAR participated in the engagement.
    e. What additional information does the Board need prior to moving forward?
        i. None currently

# Oregon State Board of Education
# April 18, 2024
AGENDA ITEM: 3.C.

**SUMMARY OF PREVIOUS BOARD ACTION**

1. Has this been before the board before? If so, what action did the board take?
    a. This OAR may have been brought to the board for approval of changes to it as per changes to the Individuals with Disabilities Act federal law in 2007.

**HAS THE RULE CHANGED SINCE LAST BOARD MEETING?**

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

**POLICY ISSUE OR CONCERNS**

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

1. Stakeholders
    a. How have you intentionally involved stakeholders who are also members of communities affected by this rule?
        i. November 2023: Private School Leader Engagement Session
        ii. December 2023: Special Education Director Engagement Session
        iii. Survey option provided to both groups in addition to the sessions.
        iv. Collaboration with Annie Marges, ODE SCORE, Alternative Education Options Specialist
    b. Who are the historically underserved groups affected?
        i. Students eligible for special education
        ii. Students placed by a school district in a private alternative school.
    c. If the rule change or policy decision has tribal implications and it has been deemed appropriate by the Department's Tribal Liaison, the Deputy Superintendent, or State Board, has there been engagement or collaboration with tribes in this rule change or policy decision?
        i. OESO consulted with ODE Tribal Consultation partners, and it was agreed that official Tribal Consultation was not applicable to this proposed rule change.
    d. How has the Oregon Department of Education modified or enhanced the rule change or policy decision to address the needs of historically underserved communities?
        i. Students with disabilities are a historically underserved community. This rule amendment addresses the needs of students eligible for special education and placed by a school district in a private alternative school.
2. Negative/Positive Effects
    a. What is the impact on the population most affected by this rule that the board should consider?

i. A positive effect of this rule amendment is that the timeline change will facilitate alignment of the start of a school year and the approval . This would allow students to begin the school year at the private alternative school where they have been placed.

b. What is the impact on eliminating the opportunity or achievement gap?
   i. An asset to this rule amendment is that it would help assure that students who qualify for special education and are placed at a private alternative school would receive services in a timely manner and with approval by the ODE.
   ii. The timeline change also supports timely contract agreements needed for placement and payment of the placement.

c. Have all the potential unintended consequences been considered?
   i. This rule amendment would potentially help reduce the achievement gap by supporting the process that private alternative schools need to do to be approved to provide special education students thus helping those students make gains in their achievement capabilities.

d. Does this rule advance the 40/40/20 goals?
   i. It is uncertain if this rule amendment would have a direct impact on 40/20/20 goals.

3. What are the barriers to more equitable outcomes?
   a. IDEA and state law requires that an IEP team that includes the parent, determines least restrictive environment and consider all placement options prior to requiring a more restrictive placement such as a private alternative school.

**EQUITY IMPACT ANALYSIS**

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

1. Will historically underserved populations be impacted by this docket item?
   a. This docket item is designed to support private alternative schools and students eligible for special education who attend such schools and is based on extensive partner engagement and best practices. Students with disabilities are a historically underserved community. This proposed change addresses the needs of students eligible for special education and placed by a school district in a private alternative school.
2. Examine the potential impact of the rule changes, policy, or action on historically underserved populations in Oregon. Describe this ongoing and/or foreseeable impact, using as much detail as possible.
   a. If this rule is not updated, it could have further negative impact on the underserved population of students with disabilities, specifically students with disabilities that attend private alternative schools.
3. Explain how the rule change, policy, or action works toward the elimination of either the opportunity or achievement gaps:
   a. By making the timeline more attainable for approval for private alternative schools to provide special education, this will increase access to special

education services for students placed there. Given access to special education services, we expect to see growth in their achievement, as well as in their own sense of worthiness.

**FISCAL ANALYSIS**

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

1. How does the proposed rule fit within the budget of the agency?
    a. The OESO office would not have a fiscal impact. The amendment change would not alter the ability for current staff to meet the expectations of the OAR.
2. How does the proposed rule change impact school districts and ESDs?
    a. There would be no fiscal impact to school districts and ESDs.
3. How does the proposed rule change impact schools and other educational institutions?
    a. There would be no fiscal impact on other educational institutions.
4. Does the proposed rule change impact other stakeholders?
    a. The proposed rule change does not impact other stakeholders.

**EFFECT OF A "YES" OR "NO" VOTE**

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

A vote of "yes" to amend OAR 581 015 2280 would lead to:

- Opportunity for Private Schools to apply for approval to provide special education on any date throughout the school year to better meet the needs of their students who are eligible for special education services.
- Quicker turnaround time for decision from ODE if private school provides completed application.
- Private Schools can have a period of approval for a full year after initial application.
- Each renewal also gives the Private School a period of approval of one full year from the date of application approval.

A vote of "no" to amend OAR 581 015 2280 would:

- Maintain a timeline for initial and renewal of approval that requires private alternative Schools to complete the approval process with a sometimes-unattainable shore timeline and on specific dates.
- This timeline and specific date requirement can delay special education services to be provided to students with disabilities.

**STAFF RECOMMENDATION**

☒ Approve ☐ Approve next month ☐ No recommendation at this time

# Oregon State Board of Education
# April 18, 2024
AGENDA ITEM: 3.C.

***Prompted by:*** ☐ State law changes ☐ Federal law changes ☐ other

**ATTACHMENTS**

Attachment 1: OAR 5810152280 Track Changes for RAC January 2024
Attachment 2: February SBE Presentation (Private and Pre Schools Contracting with Agencies)

# OAR 581 015 2280
# Process for Approval of Private School or Preschool as a Contractor with Public Agencies

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Allyson McNeill (she/her), Director, OESO Resource Management and Operations

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# Process for Approval of Private School or Preschool as a Contractor with Public Agencies

**Summary of the OAR 581 015 2280 and proposed amendment:**

The Oregon Administrative Rule 581-015-2280 contains the process for approval of private alternative schools to contract with public agencies.

This rule impacts children eligible to receive special education services whose needs for services and supports cannot be provided in the public school and who are placed by a school district into a private school setting.

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Federal and State law allow IEP teams to refer or place children in private school settings when their needs cannot be supported in the public school.

OESO would like to adjust the timeline for approval within this OAR to reduce duplication of effort for private schools, remove timeline barriers, remove specific dates, and to clarify the language explaining the timeline.

Changing the timeline and removing specific dates will ease the burden on private schools and help reduce duplication of effort. These changes would also help ensure continuation of special education services to students placed by a school district in a private alternative school.

# History of  OAR 581 015 2280

**Why are changes/amendments being proposed?**

- As per OAR 581 015 2280, private alternative schools must complete an application process with Oregon Department of Education (ODE) to provide special education services. The Office of Enhancing Student Opportunities (OESO) collaborates with the private alternative schools to complete the approval on a particular timeline.
- **The current timeline for initial and renewal of approval requires private school to complete the process with a sometimes-unattainable short timeline for renewal and on specific dates.**
- OESO would like to adjust the timeline for approval within this OAR to reduce duplication of effort for private alternative schools, remove timeline barriers, remove specific dates, and to clarify the language explaining the timeline.
- **This rule originated in 1978 and was updated with IDEA revisions and renumbered in 2007.**

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**What is the current requirement in rule or statute?**

- The current timeline for initial and renewal of approval requires private alternative schools to complete the process with a sometimes-unattainable short timeline for renewal and on specific dates.
- Example of timeline change:  **Currently, under this OAR, if a private alternative school applies for approval to provide special education in March 2024, they would be expected to "reapply" August 2024.**

**Why is this rule being brought forward right now?**

- **Changing the timeline and removing specific dates will ease the burden on private alternative schools and help reduce duplication of effort.**
- **Amending the existing rule will help ensure that students who qualify for special education that attend private alternative schools will receive special education services in a timely and efficient manner.**

# Purpose of the rule and impact

**What function does the current rule hold?**

- The Oregon Administrative Rule 581-015-2280 is the process for approval of private alternative schools to contract with public agencies.

- **The Application and Review section of this OAR outlines the application process and the steps, such as: the documentation and information these institutions need to provide, as well as the review and evaluation process conducted by the ODE to determine their eligibility.** 96

- This rule impacts children eligible to receive special education services whose needs for services and supports cannot be provided in the public school and who are placed by a school district into a private alternative school setting.

# Who may be affected by this?

- **Private alternative schools who need to provide special education services.**

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- **Students who are eligible for special education services attending private alternative schools**

- **School Districts who place a student eligible for special education in a private alternative school**

# Voice, Input, and Engagement

**Who was involved in bringing this to the Board?**

- Office of Enhancing Student Opportunities (OESO) of ODE
- Allyson McNeill, ODE OESO, Director of Resource Management and Operations
- Rae Ann Ray, ODE OESO, IDEA General Supervision Specialist

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**What did engagement in this process entail?**

- In addition to a Smartsheet survey, Engagement Sessions were held for these groups:
  1. Private Alternative School Leaders of Oregon (November 2023)
  2. Special Education Directors of Oregon (December 2023)
- Ongoing consultation with Annie Marges, ODE SCORE, Alternative Education Options Specialist

# Equity Impact:
# Historical Underserved Groups Affected

**Who are the historically underserved groups affected?**

Students who are eligible for special education and students placed by a school district in a private alternative school is the historically underserved group affected.

**Has there been consultation or collaboration with tribes in this rule change or policy decision?**

**OESO consulted with ODE Tribal Consultation partners, and it was agreed that official Tribal Consultation was not applicable to this proposed rule change.**

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

**Students with disabilities are a historically underserved community. This rule amendment addresses the needs of students who are eligible for special education and placed by a school district in a private alternative school.**

# EFFECT OF A “YES” or “NO” VOTE

**A vote of “yes” to amend OAR 581 015 2280 would lead to:**

- Opportunity for Private Schools to apply for approval to provide special education on any date throughout the school year to better meet the needs of their students who are eligible for special education services.
- Quicker turnaround time for decision from ODE if private school provides completed application.
- Private Schools can have a period of approval for a full year after initial application.
- Each renewal also gives the Private School a period of approval of one full year from the date of application approval.

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**A vote of “no” to amend OAR 581 015 2280 would:**

- Maintain a timeline for initial and renewal of approval that requires private alternative Schools to complete the approval process with a sometimes-unattainable shore timeline and on specific dates.
- This timeline and specific date requirement can delay special education services to be provided to students with disabilities.

OREGON
DEPARTMENT OF
EDUCATION

# OAR 581 015 2280
# Proposed Language Changes

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# Process for INITIAL Approval of Private School or Preschool as a Contractor with Public Agencies

- **Proposed Rule Changes**
  - **<u>INITIAL APPLICATION PROCESS</u>**

    (1) Initial approval: A private school or private preschool applying for initial approval may submit an application to the Department at any time pursuant to OAR 581-015-2270 and 581-015-2275, respectively. ~~The private school or preschool will be notified by the Department of its approval or denial as quickly as possible but no later than 45 days after receipt of the completed application. The period of approval of the private school or preschool receiving initial approval will be from the date of notification of approval by the Department until the 15th day of August.~~

    Within 30 calendar days of receiving the application, the ODE will review the submitted materials and may request additional documentation or clarification from the applicant to complete the application. The ODE will issue a decision after receiving a complete application. This decision will either grant or deny approval to provide special education services to students with disabilities placed or referred by public schools as per IDEA Sections 300.145-300.147 as a private alternative education facility

- **Summary of Proposed Changes**
  - Change from “no later than 45 days” to “Within 30 calendar days of receiving the application, the ODE will review the submitted materials and may request additional documentation or clarification from the applicant to complete the application.”
  - Remove specific date “15th of August” as date for beginning the period of approval

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# Process for RENEWAL Approval of Private School or Preschool as a Contractor with Public Agencies

- **Proposed Rule Changes**
  - **RENEWAL APPLICATION PROCESS**

    2) Renewal: (a) After a private school or preschool receives initial approval of an application, the private school or preschool must submit annual applications for renewal in accordance with OAR 581-015-2270 and 581-015-2275, respectively.

    (b~~) The Department will begin accepting a private school's or preschool's annual application for renewal on April 1 of each year. The Department will notify the private school or preschool of its decision to renew or deny renewal of approval within 45 days of receipt of the completed application. The period of approval for a private school requesting renewal will be one year beginning on the 15th day of August.~~ (b) To maintain continuous approval, a private school must demonstrate ongoing compliance and reporting obligations as well as submit evidence of updated insurance, fire, and health inspections with their renewal application 30 days prior to the expiration date which is one year from the initial approval date.

    (c)The ODE will review the complete application and compliance documentation then issue a decision to either grant or deny a renewal approval to provide special education services by the expiration date.

- **Summary of Proposed Changes**
  - Remove specific date of "April 1" as the date schools can begin applying for renewal
  - Remove specific date "15th of August" as date for beginning the period of approval
  - Change "ODE…decision to renew or deny renewal of approval within 45 days of receipt of the completed application"
    To
    "a private school must demonstrate ongoing compliance and reporting obligations as well as submit evidence of updated insurance, fire, and health inspections with their renewal application 30 days prior to the expiration date which is one year from the initial approval date. "

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# Process for Approval of Private School or Preschool as a Contractor with Public Agencies

**Benefits of this change:**

- Opportunity for Private Schools to apply to be approved to provide special education on any date throughout the school year to better meet the needs of their students who are eligible for special education services

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- Quicker turnaround time for decision from ODE if private school provides completed application
- Private Schools can have a period of approval for a full year after initial application
- Each renewal also gives the Private School a period of approval of one full year from the date of application approval

# Questions

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# Input

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Contact:
Allyson McNeill : allyson.mcneill@ode.oregon.gov
Rae Ann Ray: raeann.ray@ode.oregon.gov

# Thank You

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# Oregon Department of Education

**Division 15**

**Special Education**

**581-015-2280**
**Process for Approval of Private School or Preschool as a Contractor with Public Agencies**

- (1) Initial approval: A private school or private preschool applying for initial approval may submit an application to the Department at any time pursuant to OAR 581-015-2270 and 581-015-2275, respectively. ~~The private school or preschool will be notified by the Department of its approval or denial as quickly as possible but no later than 45 days after receipt of the completed application. The period of approval of the private school or preschool receiving initial approval will be from the date of notification of approval by the Department until the 15th day of August.~~ Within 30 calendar days of receiving the application, the ODE will review the submitted materials and may request additional documentation or clarification from the applicant to complete the application. The ODE will issue a decision after receiving a complete application. This decision will either grant or deny approval to provide special education services to students with disabilities placed or referred by public schools as per IDEA Sections 300.145-300.1471 as a private alternative education facility

(2) Renewal:

(a) After a private school or preschool receives initial approval of an application, the private school or preschool must submit annual applications for renewal in accordance with OAR 581-015-2270 and 581-015-2275, respectively.

- (b~~) The Department will begin accepting a private school's or preschool's annual application for renewal on April 1 of each year. The Department will notify the private school or preschool of its decision to renew or deny renewal of approval within 45 days of receipt of the completed application. The period of approval for a private school requesting renewal will be one year beginning on the 15th day of August.~~ (b) To maintain continuous approval, a private school must demonstrate ongoing compliance and reporting obligations as well as submit evidence of updated insurance, fire, and health inspections with their

renewal application 30 days prior to the expiration date which is one year from the initial approval date.

- (c)The ODE will review the complete application and compliance documentation then issue a decision to either grant or deny a renewal approval to provide special education services by the expiration date.

(3) Amendment:

(a) An approved private school or preschool may make major program changes only with written prior approval from the Department. A major program change consists of any change in the information contained in a private school's or preschool's approved application that would affect the school or preschool's approval or disapproval under this rule.

(b) To request and receive approval for program changes, the private school or preschool must submit an amendment to the current approved application describing the changes proposed and the reasons for the changes. In addition, the amendment must describe the effect the changes will have on the children currently served under contracts with public agencies.

(c) After submitting an amendment as described in subsection (4)(a) of this rule, the private school or preschool may operate the services under the provisions of the amendment with conditional approval until the Department notifies the private school of the approval or denial of the amendment. The Department will notify the private school or preschool of approval or denial within a reasonable period of time, but no more than 45 days after receipt of the amendment by the Department.

**Statutory/Other Authority:** ORS 343.041, 343.045 & 343.055
**Statutes/Other Implemented:** ORS 343.221, 343.475 & 343.495
**History:**
Renumbered from 581-015-0131, ODE 10-2007, f. & cert. ef. 4-25-07
ODE 2-2003, f. & cert. ef. 3-10-03
ODE 18-2000, f. & cert. ef. 5-23-00
EB 18-1994, f. & cert. ef. 12-15-94
EB 20-1989, f. & cert. ef. 5-15-89
EB 40-1988(Temp), f. & cert. ef. 11-15-88
1EB 28-1978, f. & ef. 7-20-78

## 581-015-2280
## Process for Approval of Private School or Preschool as a Contractor with Public Agencies

**Relevant Statutes:**

581-015-2240 Requirement for Least Restrictive Environment
581-015-2245 Alternative Placements and Supplementary Aids and Services
581-015-2250 Placement of the Child
581-015-2255 Nonacademic Settings
581-015-2260 Rights of Children with Disabilities in Private Schools Placed or Referred by Public Agencies
581-015-2265 Obligations of Public Agencies that Contract with Approved Private Schools
581-015-2270 Standards for Approval of Private Schools for School-age Children
581-015-2275 Standards for Approval of Private Preschools
581-015-2280 Process for Approval of Private School or Preschool as a Contractor with Public Agencies
581-015-2285 Suspension, Revocation or Refusal to Renew Approval
581-015-2290 Appeal of Denial, Suspension, Revocation or Refusal to Renew Approval
581-015-2295 Out-of-State Placements for Special Education

# Oregon State Board of Education
# April 18, 2024
AGENDA ITEM: 3.D.

| | |
|---|---|
| **SUBJECT:** Community Eligibility Provision (CEP) Incentive Program Rule Revision<br>**STAFF NAME & OFFICE**: Jessica Visinsky, Child Nutrition Program<br><br>We are seeking revision of the current CEP Incentive Program Rule to align with revised federal regulations.<br><br>☐ New Rule<br>☒ Amend Existing Rule<br>☐ Repeal Rule | ☐ **First Reading**<br>☐ **Presentation**<br>☐ **No Presentation**<br>☒ **Action**<br>☐ **Temp Rule**<br>☐ **Presentation**<br>☒ **No Presentation** |

**BACKGROUND**

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

1. History:
    a. CEP is a federal program that allows eligible schools to offer all students breakfast and lunch at no charge, under USDA meal program
    b. Eligibility for CEP is based on percentage of total students enrolled in a federal assistance program (known as identified student percentage)
    c. Previous federal threshold for eligibility in CEP was 40% ISP, USDA lowered this threshold to 25% in October 2023
    d. Student Success Act (SSA) Child Nutrition Initiatives provide supplemental reimbursement for schools that participate in CEP
2. Purpose
    a. This rule provides guidance on the supplemental funding received by eligible CEP schools through the Hunger Free Schools Account.
3. Does the board have any areas of discretion or is this strictly mirroring statute?
    a. The changes are mirroring current federal statute.
4. Stakeholder voice/input (individual and collective i.e., groups)
    a. Multiple stakeholder groups were engaged when the federal regulations were updated. ODE CNP met with advocacy groups, school district personnel, and legislators. All parties indicated interest in changing the current OAR to align with federal regulation. The impotence behind the alignment is to ensure that all schools participating in CEP may be eligible to receive state supplemental funds.

**SUMMARY OF PREVIOUS BOARD ACTION**

1. The Board previsouly heard this item as a First Read at their March 14th meeting.

**HAS THE RULE CHANGED SINCE LAST BOARD MEETING?**

# Oregon State Board of Education
# April 18, 2024
AGENDA ITEM: 3.D.

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

**POLICY ISSUE OR CONCERNS**

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

1. Stakeholders
    a. ODE Child Nutrition Programs has been working very closely with a wide group of stakeholders around this program.
2. Negative/Positive Effects
    a. Updating the rule will allow all schools that participate in CEP to be eligible for state supplemental funding.
3. What are the barriers to more equitable outcomes, either:
    a. Failing to update the rule would mean that not all schools that provide meals to students at no charge would be eligible for state supplemental funding.

**EQUITY IMPACT ANALYSIS**

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

1. Revising the current OAR will allow a greater number of schools to receive SSA supplemental funding, encouraging greater participation in CEP and a larger number of students receiving school breakfast and lunch at no charge.

**FISCAL ANALYSIS**

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

**1.** Change in this rule will not hold any additional fiscal impact to ODE, nor any measurable financial impact to small businesses

**EFFECT OF A "YES" OR "NO" VOTE**

Approving the change will result in the OAR aligning with federal regulations and will provide opportunities for a greater number of schools to receive supplemental state funding for participating in the CEP Inventive Program and providing meals at no cost to students.

Voting No on the rule change will not allow for this funding the reach schools that elect at the lower eligibility levels, which will most likely prevent them from participating in CEP and offering meals to students at no charge.

# Oregon State Board of Education
# April 18, 2024
AGENDA ITEM: 3.D.

**STAFF RECOMMENDATION**

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

**ATTACHMENTS**

Attachment 1: CEPI OAR 581-051-0610

**581-051-0610**
**Community Eligibility Provision Incentive Reimbursement Program**

(1) As used in this section:

(a) "Breakfast" means a reimbursable breakfast that is provided through the federal School Breakfast Program.

(b) "Community Eligibility Provision" refers to the alternative reimbursement option administered by the United States Department of Agriculture for schools and school districts in high-poverty areas through which participating schools or school districts agree to provide breakfasts and lunches at no charge to all students in exchange for receiving federal meal reimbursements based on the schools' or districts' identified student percentage.

(c) "Eligible school or district" means a school, a group of schools, or a school district that:

(A) ~~Has an identified student percentage of at least 40 percent, as of April 1 of the school year prior to participating~~, Effective beginning School Year 2024-2025 and thereafter, meets all federal regulations and requirements for participating in the Community Eligibility Provision per 7 CFR 245.9(f);

(B) Participates in both the federal National School Lunch and School Breakfast Programs; and

(C) Complies with the regulations and procedures established by the United States Department of Agriculture for the administration of the Community Eligibility Provision.

(d) "Identified students" has the meaning given that term in 7 CFR 245.9(f).

(e) "Identified student percentage" has the meaning given that term in 7 CFR 245.9(f).

(f) "Identified student percentage reimbursement goal" is the percentage of all breakfasts and lunches an eligible school or district served to its students during a school year that the Oregon Department of Education has determined should be reimbursed at an amount equal to either the applicable federal free meal reimbursement rate, or a supplemental meal reimbursement rate calculated by the department for the Community Eligibility Provision Incentive Reimbursement Program.

(g) "Lunch" means a reimbursable lunch that is provided through the federal National School Lunch Program.

(h) "School district" means an Oregon common school district, joint school district, union high school district, education service district, or public charter school.

(i) "School year" means the twelve-month period beginning on July 1 and ending on June 30.

(2) The purpose of the Community Eligibility Provision Incentive Reimbursement Program is to encourage participation in the federal Community Eligibility Provision, and maximize the number of schools participating in the provision, by making the provision financially viable for more eligible schools and districts. The program achieves its purpose by supplementing the federal reimbursements participating

schools and school districts receive for the breakfasts and lunches they serve at no cost to their students with an additional state-funded meal reimbursement.

(3)(a) The Oregon Department of Education will notify each school or district that is eligible for participation in the Community Eligibility Provision Incentive Reimbursement Program of its eligibility and that it will receive a supplemental, state-funded meal reimbursement that is in addition to any federal meal reimbursement received through the Community Eligibility Provision. The program is not competitive; participation in the program is open to all eligible schools and districts.

(b) An eligible school or district must notify the department of its intent to participate in the Community Eligibility Provision Incentive Reimbursement Program in the form and manner prescribed by the department.

(4)(a) The Oregon Department of Education will make the first reimbursements under the Community Eligibility Provision Incentive Reimbursement Program for breakfasts and lunches eligible schools and districts serve their students during the 2020-21 school year.

(b) Beginning in the 2020-21 school year, the department will publish the identified student percentage reimbursement goal for the current school year. Depending on the number of claims received, the amount of state funds allocated for reimbursements, the amount of state funds available for paying claims, changes in student enrollment, or other related factors, the department may revise the identified student percentage reimbursement goal for the current school year. The department will notify eligible schools and districts eight weeks in advance of any changes in the current school year's identified student percentage reimbursement goal.

(5) The Oregon Department of Education will issue periodic reports about the Community Eligibility Provision Incentive Reimbursement Program. The reports will include, but are not limited to, how much remains of the funds allocated for the program, the number of schools or districts participating, and the number of students served.

(6)(a) The Oregon Department of Education will publish a Community Eligibility Provision Incentive Reimbursement Program agreement form. Eligible schools or districts must submit a signed agreement form to the department before they can receive supplemental, state-funded meal reimbursements through the program.

(b) The department will base its program agreement on an eligible school or district's existing agreement with the department to operate one or more federal school nutrition programs. The program agreements will include, but are not limited to, a requirement that the eligible school or district comply with applicable state and federal requirements for the administration of the federal school nutrition programs and the terms of its existing agreement to operate one or more federal school nutrition programs.

(7)(a) The Oregon Department of Education will develop an annual supplemental meal reimbursement rate for the Community Eligibility Provision Incentive Reimbursement Program. The supplemental meal reimbursement rate will be based on:

(A) The free reimbursement rate established by the United States Department of Agriculture for reimbursable meals; and

(B) Any amounts otherwise reimbursed or paid by state, federal or other sources.

(b) Notwithstanding paragraph (a) of this subsection, the department may calculate an alternative supplemental meal reimbursement at a lower rate for schools and districts participating in the program that have an identified student percentage that is equal to or greater than ~~30~~ 15 percent, but less than ~~40~~ 25 percent, as of April 1 of the fourth year of the school or district's four-year community eligibility cycle, and are continuing on the Community Eligibility Provision for a fifth year.

(8)(a) Eligible schools and districts participating in the Community Eligibility Provision Incentive Reimbursement Program must submit a monthly claim for reimbursement in the form and manner prescribed by the Oregon Department of Education. The department will process supplemental, state-funded meal reimbursements paid through the program according to the United States Department of Agriculture's rules and procedures for submitting and processing meal reimbursement claims through the National School Lunch and School Breakfast Programs.

(b) If a monthly claim for reimbursement submitted by a school or district participating in the program is adjusted after the school or district received federal or state reimbursements for the meals it served during that month, the department may take steps to avoid an overpayment or underpayment, including but not limited to reducing or increasing the amount of the following month's supplemental meal reimbursement by the amount of the overpayment or underpayment.

(c) A school or district participating in the program may not receive supplemental state funds if it does not submit a monthly claim for reimbursement.

(9) A school or district participating in the Community Eligibility Provision Incentive Reimbursement Program must deposit any supplemental, state-funded meal reimbursements it receives through the program in its nonprofit school food service account.

(10)(a) The Oregon Department of Education shall publish performance measures and guidance documents for participants in the Community Eligibility Provision Incentive Reimbursement Program.

(b) Every year, a school or district participating in the program must report on the program in the manner and form prescribed by the department. The department may only require reporting that is necessary:

(A) For making reimbursements under this section;

(B) To ensure the accuracy of reimbursements made under this section, and compliance with this section and the program agreement; or

(C) To prevent waste, fraud, and abuse in reimbursements made under this section.

**Statutory/Other Authority:** 2019 OR Laws, Ch. 122, Sec. 30 (Enrolled HB 3427)
**Statutes/Other Implemented:** 2019 OR Laws, Ch. 122, Sec. 30 (Enrolled HB 3427)
**History:**
ODE 33-2022, amend filed 06/23/2022, effective 06/23/2022
ODE 12-2020, adopt filed 04/23/2020, effective 04/23/2020

**Criteria for Professional Learning Related to Teaching Inclusive Social Science Standards**

(1) For purposes of this rule, "Culturally responsive" means the implicit recognition and incorporation of the cultural knowledge, experience, and ways of being and knowing of learners in teaching, learning, and assessment.

(2) For the purpose of this rule, "best practices" means professional learning aligned with specific content and subject standards, incorporating active learning for participants, encouraging sustained and continuous collaboration, and learning for improvement in instruction.

(3) Professional learning pursuant to SB 1050 must:

(a) Improve educators' knowledge of the histories, contributions and perspectives of the individuals and groups named in ORS 329.494 and ORS 329.045(1)(b)(B);

(b) Utilize best practices for culturally responsive professional learning with opportunities for ongoing and follow-up engagements with participants extending throughout the school year.

(c) Improve educators' understanding of culturally responsive pedagogy

(d) Encourage and guide the revision of curriculum to better address the histories, contributions, and perspectives of individuals and groups related to ORS 329.494 and ORS 329.045 (1)(b)(B).

# Oregon State Board of Education
# April 18, 2024
AGENDA ITEM: 3.F.

| | |
|---|---|
| **SUBJECT:** OAR # 581-020-0700 **Criteria for Professional Learning Related to Teaching Inclusive Social Science Standards**<br><br>**STAFF NAME & OFFICE**: Amit Kobrowski, Rebecca Bahr, and Alexa Pearson, Office of Teaching, Learning, and Assessment<br><br>Social science standards that integrate Holocaust and genocide and ethnic studies will be required to be taught beginning in the 2026-2027 school year. The legislature recognized the need to support educators with implementation and passed SB 1050 to provide funding to ODE to provide professional learning. SB 1050 requires the State Board of Education to adopt rules establishing standards and criteria for this professional learning.<br><br>☒ New Rule<br>☐ Amend Existing Rule<br>☐ Repeal Rule | ☐ **First Read of Proposed Rule**<br>☐ **Presentation**<br>☐ **No Presentation**<br>☒ **Action**<br>☐ **Temp Rule**<br>☐ **Presentation**<br>☒ **No Presentation** |

## BACKGROUND

### History & Purpose

Recent legislative initiatives, such as HB 2845 (2017) and SB 664 (2018), mandated the integration of Holocaust and other genocides education and ethnic studies into K-12 social science standards. Educators and community partners have expressed a need for support and training to effectively implement these standards.

Senate Bill 1050 (2023) was sponsored by Sen. Wagner at the request of Governor Kotek. The bill directs the Department of Education to provide professional development to ensure that school districts can offer instruction that meets academic content standards related to Holocaust, genocide, and ethnic studies no later than 2026-2027. The goal of this professional development is to provide educators with the content knowledge and culturally responsive teaching strategies required to implement the new standards effectively; the mandate is supported by $2,250,000 in funding. The proposed rule creates criteria to help guide the development of this professional learning.

ODE will design and facilitate professional learning experiences using the criteria established in the draft rule. Input from educators, community members, and advisory boards will inform the content and delivery of these opportunities.

### Engagement

Public engagement sessions on the criteria were held on February 13, 15, and 16, 2024. Educators, leaders of community organizations, higher education organizations, Regional Educator Network

leaders, and other interested members of the public provided feedback on the draft rule. Additional engagement occurred during presentations to the Joint Ways and Means Committee, ESD School Improvement Coordinators, the Office of Indian Education Services, and members of the ODE internal SB 1050 Core Team, which includes staff from Office of Teaching and Learning (OTLA), the Educator Advancement Council (EAC), the Office of Indian Education Services (OIES), and the Office of Education, Innovation, and Improvement (EII). OTLA staff also presented to the Rules Advisory Committee on March 7, 2024 and the State Board of Education (SBE) on March 14, 2024.

Analysis of engagement feedback was divided into two categories: areas that received support and areas that needed clarification. The areas in which the proposed Criteria for Professional Learning Related to Teaching Inclusive Social Science Standards were most heavily supported included:

- The definition of "culturally responsive"
- Focus on building content knowledge for educators
- Recognition of the need for educator professional learning to address the 2024 Social Science Standards

Feedback on areas in which the proposed Criteria for Professional Learning Related to Teaching Inclusive Social Science Standards could be clarified included:

- The potential need for additional definitions of terms (e.g., best practices, professional learning, curriculum)
- Recognition of different contexts and needs across the state
- Refinement of the professional learning content based on input from local, culturally specific organizations and educators

**SUMMARY OF PREVIOUS BOARD ACTION**

A first read of the proposed rule criteria for professional learning related to teaching inclusive social science standards was presented to the Board on March 14,2024.

**HAS THE RULE CHANGED SINCE THE LAST BOARD MEETING?**

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

**Added:**

**What:** (2) For the purpose of this rule, "best practices" means professional learning aligned with specific content and subject standards, incorporating active learning for participants, encouraging sustained and continuous collaboration and learning for improvement in instruction.

**Why**: After receiving feedback from community engagement, the RAC and the SBE on what constitutes best practices for professional learning, this section of the rule criteria was added. It specifically incorporates the following aspects of the ESSA definition of Professional Learning: tied/aligned to specific content and standards; incorporates active learning; and is collaborative.

**Removed:**

**What:** (c) Improve educators' understanding of culturally responsive pedagogy ~~for the classroom~~

**Why:** does not add value and implies limitations to the use of culturally responsive pedagogy to only the classroom environment

## POLICY ISSUE OR CONCERNS

The draft rule sets out criteria for professional learning to enhance educators' understanding of culturally responsive pedagogy and to improve their knowledge of the histories, contributions, and perspectives of the individuals and groups named in ORS 329.494 and ORS 329.045(1)(b)(B) as directed by Senate Bill 1050.

The inclusion of traditionally underrepresented identities and perspectives in social science standards creates a more complete and equitable view of the past. In Oregon, as in other states, there has been strong sentiment surrounding the inclusion of ethnic studies, Holocaust, and genocide studies in social science standards. The teaching of "hard histories" such as the Holocaust and other genocides requires sensitivity, empathy, and a deep understanding of the subject matter.

Educators must approach these topics with care to ensure that students are not traumatized by the content and that the severity of the events is not minimized or sensationalized. Additionally, educators must possess a high-level of content knowledge to accurately convey the historical context, causes, and consequences of such atrocities. Moreover, they must be skilled in facilitating open and respectful discussions in the classroom.

There are several challenges for districts to individually provide high-quality professional learning that supports teachers to effectively implement the social science standards. Few districts have social studies TOSAs at the district office to coordinate and develop content-based learning, and many districts have insufficient local funding to invest in developing professional learning. A statewide system provides coherence and reduces the possibility of disparities among offerings across the state, giving equitable access to high quality professional learning regardless of a district's location or size.

The criteria are designed to ensure that the professional learning provided is ongoing, and not a "one and done" approach. This structure is essential for educators to continuously enhance their understanding of effectively teaching the sensitive subjects included in the social science standards and is fundamental for effective application of the learning. Furthermore, to meet the criteria, professional learning itself must be culturally responsive thus providing participants with a pedagogical model as well as the opportunity to experience it as learners themselves.

Ultimately, these learning experiences will support teachers to create instructional environments where students can critically engage with history while fostering empathy, understanding, and a commitment to social justice.

# Oregon State Board of Education
# April 18, 2024
AGENDA ITEM: 3.F.

## EQUITY IMPACT ANALYSIS

Developing professional learning criteria related to inclusive social science instruction will support the equitable implementation of the updated social science standards. Furthermore, providing criteria for high-quality professional learning reduces the risk of the social science standards being implemented in harmful ways for students whose identities have been misrepresented or underrepresented historically.

As educators become increasingly proficient in teaching the new, more inclusive social science standards, all students will examine perspectives, discourses, and rich counternarratives that highlight the variety of perspectives of ethnicities and historical events. For students from historically and currently underrepresented identities, these learning experiences may resonate with their lived experiences and provide a sense of belonging. Students who have a sense of belonging in school have improved learning outcomes. Providing culturally responsive instruction facilitates the understanding of one's own life as well as others' lived experiences and perspectives, all of which benefit Oregon's students.

## FISCAL ANALYSIS

The proposed rule change will influence how ODE uses the funds from SB 1050 to design and deliver high-quality professional learning opportunities for educators. There is no anticipated cost to districts, charter schools, or education service districts.

## EFFECT OF A "YES" OR "NO" VOTE

A "yes" vote will result in the establishment of criteria to help guide the development of the professional learning related to inclusive social science standards including Holocaust and genocide studies and ethnic studies.

A "no" vote will result in a lack of criteria to help guide the development of the professional learning related to inclusive social science standards including Holocaust and genocide studies and ethnic studies.

## STAFF RECOMMENDATION

**X Approve** Approve next month ☐ No recommendation at this time
***Prompted by:*** ☐ State law changes ☐ Federal law changes ☒ other **prompted by state law**

## ATTACHMENTS

Attachment 1: Draft Rule for Criteria for Professional Learning Related to Teaching Inclusive Social Science Standards

# Oregon State Board of Education
# April 18, 2024
AGENDA ITEM: 3.G.

| | |
|---|---|
| **SUBJECT:** Proposed Changes to the Program Budgeting and Accounting Manual (PBAM) for 2024-2025<br>**STAFF NAME & OFFICE**: Mike Wiltfong and Lindsay Malinowski, Office of Finance and Information Technology<br><br>The Chart of Accounts Committee and ODE School Finance Unit would like to propose a few changes to the Program Budgeting and Accounting Manual (PBAM) for the first reading process. Proposed changes include a format update to align with ODE's manual style guide and the addition of three new account number codes to meet the needs of school district budgeting along with minor language modifications to existing codes. These changes will go into effect 7/1/2024. | ☐ **Informational Presentation**<br><br>☐ **Written Report** |

**BACKGROUND**

1. History:
    a. The Chart of Account Committee (CAC) drafted the Program Budgeting and Accounting Manual (PBAM) in 1998 as a result of House Bill 3636 which directed the Department of Education to review, modify, update, and improve the existing chart of accounts for school disticts and eductiaon services districts that will allow for valid comparisons of expenditures among schools and districts.

2. Purpose
    a. The PBAM is designed as a resource tool for school distrists and education service districts in Oregon.
    b. The accounting code structure is designed to provide consistent classification of expenditures to allow valid spending comparisons among schools and districts.
    c. The budgeting and accounting system can be used to plan and manage the resources of a school district.
    d. The manual is a working handbook to which revisions will be made.

3. Does the board have any areas of discretion on this policy and/or update?
    a. The State Board of Education does have descretion to weigh-in and make edits, make recommendations, or deny changes to the PBAM. If concerns arise from the Board, the PBAM owner would reconvene the CAC for further clarification and would return with revised edits.

4. Stakeholder voice/input (individual and collective i.e., groups)
    a. The CAC, a team of school business officials and local certified public accountants from around the state, along with the School Finance unit of the ODE has been involved with the PBAM since its establishment.
    b. The CAC convenes on an annual basis to review and revise the PBAM.
    c. Oregon school districts and education services districts use this manual as a tool to promote consistency of accounting across the state.

d. If there is interest for public input during meetings of the CAC, opportunities can be made available for participation in the process. This was demonstrated during the implementation of HB 3499.
e. The manual is intended for school districts and education service districts to be used in all levels of management, ranging from the classroom to the boardroom.

**SUMMARY OF PREVIOUS BOARD ACTION**

1. The 2019 edition of the PBAM was brought before the State Board of Education with proposed revisions and was approved by SBE in Apirl 2019.

**POLICY ISSUE OR CONCERNS**

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

1. Stakeholders
    a. The CAC and ODE School Finance has intentionally involved stakeholders who are also members of communities that are affected by this rule.
    b. There aren't any underserved groups affected by the PBAM.
    c. The PBAM has no tribal implications and it has been deemed appropriate by the Department's Tribal Liaison, the Deputy Superintendent, or State Board.

2. Negative/Positive Effects
    a. The impact on the school districts and education service districts who are most affected by this manual has been positive and effective.
    b. School administrators are key users of the financial account classification system in the PBAM, which provides guidelines for budget forecasting to eliminate opportunity gaps or achievement gaps.
    c. The PBAM has been reviewed and modified over the past twenty years to consider any potential unintended consequences for school districts and education service districts.

3. What are the barriers to more equitable outcomes, either:
    a. The account classification system presented in the PBAM is designed to enable the districts to produce the financial reports necessary to better meet all of the potential uses for internal and external requirements.

**EQUITY IMPACT ANALYSIS**

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

1. How are historically underserved populations impacted by this docket item?
    a. This docket item will have no impact on historically underserved populations.

**FISCAL ANALYSIS**

Are there any fiscal impacts that the Board should consider as part of this update or report? Does the proposed rule change impact other stakeholders?

1. The proposed changes to the PBAM will fit within the budget of the agency and the School Finance unit will be impacted by these proposed changes.
2. School districts and education service districts will be impacted by the proposed changes to the PBAM within their fiscal office operations for budgeting and accounting.
3. The Oregon Association for School Business Officials (OASBO) may impact as another education agency who supports school districts and education service districts.
4. The proposed changes to the PBAM may impact stakeholders who benefit from using the financial reporting information presented by school districts and education service districts.

**ATTACHMENTS**

Attachment 1: 2023 Program Budgeting and Accounting Manual (PBAM)

# PROGRAM BUDGETING AND ACCOUNTING MANUAL

2023

For School Districts and Education Service Districts in Oregon





OREGON DEPARTMENT OF EDUCATION

*Oregon achieves . . . together!*

# PROGRAM BUDGETING AND ACCOUNTING MANUAL

For School Districts and Education Service Districts in Oregon

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This document was produced by the School Finance Unit
Office of Finance and Information Technology
Oregon Department of Education

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Dr. Charlene Williams • Deputy Superintendent of Public Instruction

Oregon Department of Education • Salem, Oregon 97310-0203

# Foreword

This edition of the *Program Budgeting and Accounting Manual* is a revision of the 2019 manual. This document becomes effective for the 2024-25 fiscal year. When the 1998 manual was drafted, the Chart of Accounts Committee recommended biennial revisions to keep the manual up to date and to promote consistency of accounting across school districts in the state. The 1998 changes were a result of House Bill 3636, enacted by the Legislature in 1997, which directed the Department of Education to review, modify, update, and improve the existing chart of accounts for school districts and education service districts that will allow for valid comparisons of expenditures among schools and districts.

School district representatives from around the state have contributed their time and expertise to complete the revised manual. The Oregon Department of Education wishes to thank the committee members for their work in completing this fourteenth edition of the manual.

Sincerely,

**Dr. Charlene Williams**

Deputy Superintendent of Public Instruction

# Chart of Accounts Review Committee Participants

We wish to thank the district staff for their time, energy, efforts, and contributions.

| Name | District/Organization | Title |
|---|---|---|
| Adams, Ann | Amity SD | Business Manager |
| Jones, Jessica | Beaverton SD | Budget Manager |
| Olson, Shelley | Beaverton SD | Financial Analyst |
| Starr, Kristie | Beaverton SD | Budget Analyst |
| Rufo, Pat | Blachly SD | Business Manager |
| Levear, Simon | Black Butte SD | Business Manager |
| Pillar, Scott | Cascade SD | Director of Finance |
| Tofflemire, Katie | Cascade SD | Grant Analyst |
| DeWolf, Whitney | Crater Lake Academy | Financial Controller |
| Shafer, Yvonne | Crater Lake Academy | Administrative Manager |
| Komar, Patt | David Douglas SD | Business Manager |
| Rodeman, Paul | David Douglas SD | Financial Systems Manager |
| Clute, Ilean | Forest Grove SD | Business Manager |
| Wolfer, Melissa | Frontier Charter Academy | Business Manager |
| Davis, Caryn | Gervais SD | Business Manager |
| Bejarano, Peter | Gresham-Barlow SD | Director of Accounting |
| Breithaupt, Margaret | Gresham-Barlow SD | Senior Accountant |
| Grant, Larry | Grove, Mueller & Swank, P.C. | CPA, Auditor |
| Jones, Jeffrey | Hillsboro SD | Business Manager |
| Morrison, Michelle | Hillsboro SD | Chief Financial Officer |
| Bewley, Martha | Jefferson ESD | Chief Financial Officer |
| Snook, Shannon | KDP Certified Public Accountants, LLP | Manager |
| Ramey, Adrienne | Marcola SD | Director of Business Services |
| May, Michelle | Marcola/TeachNW | Accounting Specialist |
| Bottomley, Sara | Multnomah ESD | Budget & Management Analyst |
| Clark, Diane | Multnomah ESD | Senior Accountant |
| Booth, Tami | North Clackamas SD | Fiscal Services Manager |
| Burke, Dawna | North Clackamas SD | Director of Fiscal Operations |
| Allen, Rhonda | North Santiam SD | Business Services Director |
| Flath, Kara | North Wasco SD | Chief Financial Officer |
| Ely, Jordan | Northwest Regional ESD | Chief Financial Officer |
| Olsen, Jackie | Oregon Association of School Business Officials | Executive Director |
| Burks, Kylee | Oregon Department of Education | Financial Reporting Analyst |
| Clark, Vanessa | Oregon Department of Education | State School Fund Coordinator |
| Hensley, Tracy | Oregon Department of Education | SFACTR Operations and Policy Analyst |
| Malinowski, Lindsay | Oregon Department of Education | SFACTR Operations and Policy Analyst |
| Marshall, Laura | Oregon Department of Education | School Finance Coordinator |
| Wiltfong, Mike | Oregon Department of Education | Administrator of School Finance & School Facilities |
| Belanger, Tim | Oregon Trail SD | Business Director |
| Morgan, Jeanne | Parkrose SD | Accounting Supervisor |
| Taylor, Maria | Parkrose SD | Senior Accountant |
| Chang, Junho | Portland Public SD | Senior Budget Manager |
| Kristin Johnson | Portland Public SD | Grant Accounting Manager |
| Petterborg, Zeb | Portland Public SD | Budget Systems Manager |
| Pinder, Tracy | Portland Public SD | Senior Director Financial Services |
| Unfried, Barbie | Redmond SD | Accounting Manager |
| Bannikov, Katie | Salem-Keizer SD | Asst Director of Financial Services |
| Bolls, Joan | Springfield SD | Director of Finance |
| Seay, Jessica | St. Helens SD | Director of Fiscal Services |
| Mehrabzadeh, Sarah | Tigard Tualatin SD | Controller |
| Moore, David | Tigard Tualatin SD | Chief Financial Officer |
| Alie, Jerolyn | West Linn-Wilsonville SD | Fiscal Accountant |
| Hughes, Son Le | West Linn-Wilsonville SD | Chief Financial Officer |

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# Chapter 1

## Introduction

### THE PURPOSE AND GOAL

The *Program Budgeting and Accounting Manual* is designed as a resource tool for school districts and education service districts in Oregon. The use of the budget and accounting codes will vary with the individual needs of each district. The minimum requirement is adopted as Administrative Rule by the State Board of Education and is in **bold type** face as shown in Chapter 2. Additional codes are available at the option of the district for more extensive use of account descriptions.

The *Program Budgeting and Accounting Manual* was developed based on the following goals:

- The accounting code structure is designed to provide consistent classification of expenditures to allow valid spending comparisons among schools and districts. The financial accounting and reporting system complies with Generally Accepted Accounting Principles (GAAP).
- The budgeting and accounting system can be used to plan and manage the resources of a school district.
- The manual is a working handbook to which revisions will be made.

With the above goals in mind, the Oregon Department of Education presents this manual to all school districts and educational service districts in the state of Oregon. It is our intent that use will occur at all levels of management, ranging from the classroom to the boardroom.

### ORGANIZATION OF THE MANUAL

Description of the account code structure begins in Chapter 2, covering fund classification, function, object, operational unit, area of responsibility, sub-area, and revenue codes. This chapter provides the basis for the account classification. Chapter 3 provides detailed definitions of the account numbers listed in Chapter 2 and special instructions to promote consistency in accounting practice.

The Department of Education will update this manual each biennium or as needed.

We welcome your comments and suggestions regarding the revised accounting manual.

### CONFORMANCE WITH GENERALLY ACCEPTED ACCOUNTING PRINCIPLES

A primary emphasis of this manual is to define account classifications that provide meaningful financial management information to its users. As part of this emphasis, the *Program Budgeting and Accounting Manual* is written to approach conformance with Generally Accepted Accounting Principles (GAAP), a uniform minimum standard of and guideline for financial accounting and reporting. The Government Finance Officers Association has developed a practical guide to implementing accounting standards in its *Governmental Accounting, Auditing and Financial Reporting* (GAAFR) document.

Achieving consistency in budgeting and financial reporting enhances our ability to present a clear picture of the district's financial condition and to make valid comparisons among districts.

Financial information that is consistently presented in a simple and straightforward format will be readily understood by the public and provide a sound basis for decision-making.

### COMPLYING WITH THE OREGON LOCAL BUDGET LAW

Oregon Budget Law (ORS 294) specifies a process and format for a district's annual budget preparation and presentation. The Oregon Department of Education, through the administrative rule process, adopts a chart of accounts (Chapter 2) that are used to classify revenues and expenditures. These account codes are approved by the Department of Revenue.

# Chapter 2

## Uses of the Account Classification System

The purposes of this chapter are to: (1) describe an accounting system and the need for the financial reports of the district; (2) describe the account classification structure; and (3) provide the chart of accounts used in a school district accounting system.

## What is an Accounting System?

What is an accounting system? How does it go about serving the diverse needs of its users? The accounting system is the means by which financial data are captured during actual operation of the district, recorded in the accounting system, and then analyzed to produce the various kinds of reports needed. Financial transactions can be classified to facilitate their accumulation in categories to display activities in the financial reports. The primary purpose of an accounting system is to produce financial information organized in various ways for various uses.

## Financial Reports

The financial reports produced in a district fall into two major groupings: internal and external. Examples of the internal reports include:

- comparison of budgeted vs. actual revenues and expenditures;
- cash flow projection;
- building operation and maintenance costs, by building; and
- expenditure accounts, showing activity during the last reporting period.
- comparison of current and prior year's revenues and expenditures.

External financial reports are produced by the district to satisfy the needs of the various users who are not a part of the district, including state and federal agencies, Congress, the Legislature, creditors and credit rating agencies, parents, taxpayers, and the general public.

Each school district is required to produce an annual financial report that has been audited by an independent audit firm. Other external reports generally are of a special purpose or nature. They may include such reports as:

- general financial/statistical summaries for use by legislators;
- specific reports of certain revenues and expenditures by program, for use by the funding source(s); and
- program cost reports.

## The State Legislature

The Oregon Legislature determines the level of funding available for the operation of Oregon's school districts. Accordingly, legislators need clear, consistent information on school spending as a basis for decision making. Cumulative information in comparable formats about the operations of groups of districts is needed to formulate funding policies.

## School Administrators and Other Employees

School administrators are key users of the financial account classification system. They must rely on financial reports to allocate and manage resources, evaluate past performance, to aid in day-to-day decision making and to inform the general public.

Budgeting, an important managerial tool for the public-school administrator, relies upon correct and properly classified accounting information. The expenditure dimensions used here offer the administrator a variety of methods for budgeting and permit local judgment about the most appropriate technique. Additionally, the accounting system satisfies the administrator's obligation to ensure compliance with the legal, regulatory and fiduciary responsibilities of this position of public trust.

## School Boards and Other Governing Units

School boards and other governing units have both a responsibility and an interest in the operation of the school system. The school board is responsible for establishing policies and for overseeing and appraising the administrator as they carry out these policies. The school board thus needs timely warning in case situations develop that require corrective action. The board also needs information to assess both the efficiency of the administration and its effectiveness in complying with policies and restrictions. Some of this information can be provided by general purpose financial reports. Comparable information obtained about other districts is also needed as a basis for comparison.

## Creditors and Potential Creditors

Creditors include bondholders and prospective bondholders, credit rating agencies that advise potential bondholders, commercial banks, vendors, and others who have extended credit, or who are considering extending credit, to the district. Typically, they would be interested in the financial position of the organization, its operating performance, and its ability to repay the bonds or loans in full and on time.

## The General Public

The interests of constituents are similar to those of resource providers: they want to understand the nature of the organization's activities, the services provided, and how effectively and efficiently resources are managed.

## The Account Classification System

The account classification system presented here is designed to enable the districts to produce the financial reports necessary to better meet all of the potential uses identified above. Based on the following guidelines, the structure meets the identified needs and will provide comparability of reported data among different districts.

1. *The chart of accounts encourages full disclosure of the financial position of the district.* Emphasis is placed on the accurate classification of financial transactions. Expenditures are recorded in the appropriate accounting categories, regardless of the implications of some of those decisions.
2. *Comprehensive financial reporting is encouraged.* The district should incorporate all financial activities into a single accounting and reporting system for full disclosure. Accounts for such activities as food services, student body activities, community services, and commercial-like enterprises all should be included in the financial reports of the district.
3. *Simplified reporting is encouraged. Governmental Accounting, Auditing, and Financial Reporting* (GAAFR) encourages using the minimum number of funds necessary for legal and operational use. Using unnecessary funds can result in inflexibility, undue complexity, and inefficient financial administration. Financial reports should be well organized and easy to read.
4. *The account classification system is flexible: it meets the needs of both small and large districts while retaining comparability of reported data.* The guidelines here include a minimum list of accounts essential for state and federal reporting. They also provide a variety of optional classifications for districts interested in a more comprehensive approach to financial accounting and reporting.

*The classification of accounts and the recommended reporting structure remain in accordance with generally accepted accounting principles.*

## Fund Classification

Governmental accounting systems are organized and operated on a fund basis. The diverse nature of governmental operations and the need for legal compliance preclude recording and summarizing financial transactions in a single accounting entity. Instead, the required accounts are organized on the basis of independent funds. If one were to compare fund accounting with commercial accounting, each fund would equate to an independent business, with a separate set of records owned by one entity, the district.

The accounting system is structured to maintain the identity of the resources, obligations, revenues, expenditures, and equities for each fund. This is accomplished by providing a complete self-balancing set of accounts for each fund that shows its assets, liabilities, reserves, fund balances or retained earnings, revenues, and expenditures or expenses.

The classifications of fund and account groups included in this handbook are similar to those used by other state and local governmental units. They consist of the following fund and account groups:

### GOVERNMENTAL FUNDS

The funds through which most districts functions are typically financed. The reporting focus is upon determining the financial position and changes in financial position, rather than upon determining net income.

### PROPRIETARY FUNDS

The funds used to account for district activities that are similar to business operations in the private sector; or where the reporting focus is upon determining net income, financial position, and changes in cash flows.

### FIDUCIARY FUNDS

The funds used to account for assets held by a district as trustee or agent. Each trust fund is treated for accounting measurement purposes in a manner similar to either a governmental fund or a proprietary fund. Expendable trust funds are accounted for in essentially the same manner as governmental funds. Nonexpendable trust funds and pension trust funds are accounted for in essentially the same manner as proprietary funds. Agency funds are purely custodial (assets equal liabilities) and thus do not involve measurements of results of operations.

## Account Groups

Groups of accounts which are used to record and control the district's general fixed assets and unmatured general long-term liabilities. Long-term liabilities of proprietary funds and trust funds should be accounted for through those funds.

These four classifications are divided into the following categories called fund types:

### GOVERNMENTAL FUNDS

100 General Fund
200 Special Revenue Funds
300 Debt Service Funds
400 Capital Project Funds

### PROPRIETARY FUNDS

500 Enterprise Funds
600 Internal Service Funds

### FIDUCIARY FUND

700 Trust and Agency Funds

## Types of Financial Activity

This publication classifies three basic types of financial activity within funds: (1) revenues and other sources of funds, (2) expenditures and other uses of funds, and (3) transactions affecting the balance sheet (assets and liabilities) of the district. For each type of transaction, the specific account code is made up of a combination of classifications called dimensions. Each dimension describes one way of classifying financial activity. The dimensions for each type of transaction are:

### REVENUES

Fund: XXX
Source: XXXX
Project: XXX

### EXPENDITURES

Fund: XXX
Function: XXXX
Object: XXX
Operational Unit: XXX
Area of Responsibility: XXX
Sub-Area: XXX

### BALANCE SHEET

Fund: XXX
Asset (or Liability): XXX

The purpose and uses of each of these dimensions are as follows:

### REVENUE DIMENSIONS

#### Source

Revenues collected by school districts are classified by major source:

| | |
|---|---|
| 1000 | Local Sources |
| 2000 | Intermediate Sources |
| 3000 | State Sources |
| 4000 | Federal Sources |
| 5000 | Other Sources |

#### Project

Districts may use additional account code dimensions to provide further classification of revenue to track receipts for a particular program, project, or school.

Sub-categories within a major source provide additional information regarding the source of revenue. For example, local sources of revenue are recorded in sub-classifications, such as local property taxes levied by the school district, tuition, fees, interest earnings, etc.

## EXPENDITURE DIMENSIONS

### Function

The function describes the activity for which a service or material object is acquired. The major functions of a district are classified into seven areas:

| | |
|---|---|
| 1000 | Instruction |
| 2000 | Support Services |
| 3000 | Enterprise and Community Services |
| 4000 | Facilities Acquisition and Construction |
| 5000 | Other Uses (Interagency/Fund Transactions and Debt Service) |
| 6000 | Contingency |
| 7000 | Unappropriated Ending Fund Balance |

Functions and sub-functions consist of activities that have similar operational objectives. Categories of activities in each of these divisions and subdivisions are grouped according to the principle that the activities could be combined, compared, related, and mutually exclusive.

### Object

The object is the service or commodity bought. These categories are also divided into sub-objects for more detailed accounting.

| | |
|---|---|
| 100 | Salaries |
| 200 | Associated Payroll Costs |
| 300 | Purchased Services |
| 400 | Supplies and Materials |
| 500 | Capital Outlay |
| 600 | Other Objects |
| 700 | Transfers |
| 800 | Other Uses of Funds |

### Operational Unit

This dimension is used to identify (1) schools or (2) non-school cost centers, such as central programs or departments. Operational unit codes are defined by the school districts but are required for state reporting purposes because expenditures are reported at the school level rather than the district level.

### Area of Responsibility

This dimension provides additional detail to the account code and is used to identify expenditures for specific curriculum areas and programs. Districts may elect to use area codes for a variety of reasons to track expenditures and manage costs.

### Sub-Area

Districts often add other account code dimensions to classify expenditures for particular purposes at their discretion. Some of the possible additional uses are:

- term;
- course;
- work order;
- bus route;
- vehicle;
- capital project.

In addition, in automated accounting software systems, there may be a need to add some codes for use by the computer. These might include:

- a transaction code to route the transaction through the system and post the correct files and fields in the data record;
- a fiscal year code to assist with closing out one year while beginning to process activity for the new year;
- a reporting level code to assist in organizing report contents and subtotals;
- a district or other organizational unit code in a multi-district system.

## THE MINIMUM CHART OF ACCOUNTS

The handbook classification structure (particularly the expenditure classifications) can generate large amounts of detailed data. However, much of the classification system described herein is offered for the optional use of the district. Hence, a district may choose, in a number of ways, which parts of the system it needs or wants to use. It may choose:

- Not to use certain optional dimensions at all;
- To consolidate certain dimensions in its own local chart of accounts;
- To use more dimensions than defined in this publication.

Whatever course a district chooses, it must follow a certain minimum list of these classifications to meet federal and state reporting requirements. This list is referred to as the “minimum chart of accounts.”

Using this publication, the district’s first task then is to decide what additional classifications it wishes to use for its own purposes. In the following account classification descriptions, the minimum chart of accounts is highlighted in bold.

# Account Classification Descriptions

The account codes are presented for use in accounting for revenue and expenditures of a school district. The codes in **bold type** face are required, except for area of responsibility. Non-bold codes are optional and may be used at the district's discretion. Definitions for each of these descriptions begin in Chapter 3.

## FUND CLASSIFICATIONS

100 General Fund
200 Special Revenue Funds
300 Dept Service Funds
400 Capital Projects Funds
500 Enterprise Funds
600 Internal Service Funds
700 Trust and Agency Funds

# Revenue Sources

## 1000 REVENUE FROM LOCAL SOURCES

1100 Taxes

**1110 Ad Valorem Taxes Levied by District**

1111 Current Year's Taxes
1112 Prior Year's Taxes
1113 County Tax Sales for back Taxes
1114 Payments in Lieu of Property Taxes
**1115 Payments in Lieu of Property Taxes Enterprise Zones School Support Fee (2023 HB 2009)**

**1120 Local Option Ad Valorem Taxes Levied by District**

1121 Current Year's Local Option Taxes
1122 Prior Year's Local Option Taxes
1123 Penalties and Interest on Local Option Taxes

**1130 Construction Excise Tax**

**1190 Penalties and Interest on Taxes**

**1200 Revenue From Local Governmental Units Other Than Districts**

1300 Tuition

1310 Regular Day School Tuition

**1311 Tuition From Individuals**
**1312 Tuition From Other Districts Within the State**
**1313 Tuition From Other Districts Outside the State**

**1320 Adult/Continuing Education Tuition**

1321 Tuition From Individuals
1322 Tuition From Other Districts Within the State
1323 Tuition From Other Districts Outside the State
1324 Tuition/Contract Receipts for Community Services

**1330 Summer School Tuition**

1331 Tuition From Individuals
1332 Tuition From Other Districts Within the State
1333 Tuition From Other Districts Outside the State

1400 Transportation Fees

1410 Regular Day School Transportation

**1411 Transportation Fees From Individuals**
**1412 Transportation Fees From Other Districts Within the State**
**1413 Transportation Fees From Other Districts Outside the State**

**1420 Summer School Transportation**

1421 Transportation Fees From Individuals
1422 Transportation Fees From Other Districts Within the State
1423 Transportation Fees From Other Districts Outside the State

**1500 Earnings on Investments**

1510 Interest on Investments
1530 Gain or Loss on Sale of Investment

**1600 Food Service**

1610 Daily Sales — Reimbursable Programs

1611 Breakfast
1612 Lunch
1613 Special Milk Program

1620 Daily Sales – Non-Reimbursable Program
1630 Special Functions

**1700 Extracurricular Activities**

1710 Admissions
1720 Bookstore Sales
1730 Student Organization Membership Dues and Fees
1740 Fees
1750 Concessions
1760 Club Fundraising
1790 Other Extracurricular Activities

**1800 Community Services Activities**

1900 Other Revenue from Local Sources

**1910 Rentals**

**1920 Contributions, Donations, and General Fundraising from Private Sources**

**1930 Rental or Lease Payments from Private Contractors**

**1940 Services Provided Other Local Education Agencies**

1941 Services Provided Other Districts Within the State
1942 Services Provided Other Districts Outside the State
1943 Services Provided Charter Schools

**1950 Textbook Sales and Rentals**

1951 Textbook Sales

**1960 Recovery of Prior Years' Expenditure**

**1970 Services Provided Other Funds**

**1980 Fees Charged to Grants**

**1990 Miscellaneous**

## 2000 REVENUE FROM INTERMEDIATE SOURCES

2100 Unrestricted Revenue

**2101 County School Funds**
**2102 General Education Service District Funds (Effective 7/1/10)**
**2103 Excess ESD Local Revenue (Effective 7/1/10)**
**2105 Natural Gas, Oil, and Mineral Receipts**

**2110 Intermediate 'I' Tax (City and County Income Taxes)**

2111 Current Year
2112 Prior Year
2113 Penalties and Interest
**2199 Other Intermediate Sources**

**2200 Restricted Revenue**

**2800 Revenue in Lieu of Taxes**

**2900 Revenue for/on Behalf of the District**

## 3000 REVENUE FROM STATE SOURCES

3100 Unrestricted Grants-In-Aid

**3101 State School Fund – General Support**
**3102 State School Fund – School Lunch Match**
**3103 Common School Fund**
**3104 State Managed County Timber**
**3106 State School Fund – Accrual**
**3199 Other Unrestricted Grants-in-aid**

3200 Restricted Grants-In-Aid

**3204 Driver Education**
**3222 State School Fund (SSF) Transportation Equipment**
**3299 Other Restricted Grants-in-aid**

**3800 Revenue in Lieu of Taxes**

**3900 Revenue for/on Behalf of the District**

## 4000 REVENUE FROM FEDERAL SOURCES

**4100 Unrestricted Revenue Direct From the Federal Government**

**4200 Unrestricted Revenue From the Federal Government Through the State**

- **4201 Transportation Fees For Foster Children**
- **4202 Medicaid Reimbursement for Eligible K-12 Expenses (Ages Five to Twenty-One)**

**4300 Restricted Revenue Direct From the Federal Government**

**4500 Restricted Revenue From the Federal Government Through the State**

- **4501 Medicaid Reimbursement for Eligible Early Intervention (EI) Services (Birth to Age Three)**
- **4502 Medicaid Reimbursement for Eligible Early Childhood Special Education (ECSE) Services (Ages Three to Five)**

**4700 Grants-In-Aid From the Federal Government Through Other Intermediate Agencies**

4800 Revenue in Lieu of Taxes

- **4801 Federal Forest Fees**
- **4802 Impact Aid to School Districts for Operation (PL 874)**
- **4803 Coos Bay Wagon Road Funds**
- **4899 Other Revenue in Lieu of Taxes**

**4900 Revenue for/on Behalf of the District**

## 5000 OTHER SOURCES

**5100 Long Term Debt Financing Sources**

- 5110 Bond Proceeds
- 5120 Bond Premium
- 5130 Accrued Interest
- 5140 Mortgage Receipts
- 5150 Loan Receipts
- 5160 Lease Purchase Receipts

**5200 Interfund Transfers**

**5300 Sale of/or Compensation for Loss of Fixed Assets**

**5400 Resources—Beginning Fund Balance**

# Expenditure Functions

## 1000 INSTRUCTION

1100 Regular Programs

**1111 Elementary, K-5 or K-6 (Effective 7/1/2011)**
**1113 Elementary Extracurricular**
**1121 Middle/Junior High School Programs**
**1122 Middle/Junior High School Extracurricular**
**1131 High School Programs**
**1132 High School Extracurricular**

**1140 Pre-kindergarten Programs**

1200 Special Programs

**1210 Programs for the Talented and Gifted**
**1220 Restrictive Programs for Students with Disabilities**

1221 Learning Centers – Structured and Intensive
1222 Development Kindergarten
1223 Community Transition Centers
1224 Life Skills with Nursing
1225 Out of District Programs
1226 Home Instruction
1227 Extended School Year Programs
1228 Diagnostic Classrooms
1229 Other Special Programs

**1250 Less Restrictive Programs for Students with Disabilities**
**1260 Treatment and Habilitation**
1270 Educationally Disadvantaged

**1271 Remediation**
**1272 Title IA/D**
**1280 Alternative Education**
1281 Public Alternative Programs
1282 Private Alternative Programs
1283-1287 District Alternative Programs
1288 Charter Schools
1289 Other Alternative Programs

1290 Designated Programs

**1291 English Language Learner – ORS 336.079**
**1292 Teen Parent Programs**
**1293 Migrant Education**
**1294 Youth Corrections Education**
**1295 English Language Learner – Non ORS 336.079**
**1299 Other Programs**

**1300 Adult/Continuing Education Programs**

**1400 Summer School Programs**

1410 Elementary
1420 Middle/Junior High
1430 High School
1460 Special Programs, Summer School
1490 Other Summer School Programs

## 2000 SUPPORT SERVICES

2100 Support Services—Students

**2110 Attendance and Social Work Services**

2111 Service Area Direction
2112 Attendance Services
2113 Social Work Services
2114 Student Accounting Services
2115 Student Safety
2117 Identification and Recruitment of Migrant Children
2119 Other Attendance and Social Work Services

**2120 Guidance Services**

2121 Service Area Direction
2122 Counseling Services
2123 Appraisal Services
2124 Information Services
2126 Placement Services
2129 Other Guidance Services

**2130 Health Services**

2131 Service Area Direction
2132 Medical Services
2133 Dental Services
2134 Nurse Services
2139 Other Health Services

**2140 Psychological Services**

2141 Service Area Direction
2142 Psychological Testing Services
2143 Psychological Counseling Services
2144 Psychotherapy Services
2148 Other Psychological Services

**2150 Speech Pathology and Audiology Services**

2151 Service Area Direction
2152 Speech Pathology Services
2153 Audiology Services
2159 Other Speech Pathology and Audiology Services

**2160 Other Student Treatment Services**
**2190 Service Direction, Student Support Services**

2200 Support Services—Instructional Staff

**2210 Improvement of Instruction Services**

2211 Service Area Direction
2213 Curriculum Development
2219 Other Improvement of Instruction Services

**2220 Educational Media Services**

2221 Service Area Direction
2222 Library/Media Center
2224 Educational Television Services
2229 Other Educational Media Services

**2230 Assessment and Testing**
**2240 Instructional Staff Development**

2300 Support Services—General Administration

**2310 Board of Education Services**
**2320 Executive Administration Services**

2321 Office of the Superintendent Services
2324 State and Federal Relations Services
2329 Other Executive Administration Services

2400 School Administration

**2410 Office of the Principal Services**
**2490 Other Support Services–School Administration**

2500 Support Services – Business

**2510 Direction of Business Support Services**
**2520 Fiscal Services**

2521 Service Area Direction
2522 Budgeting Services
2523 Receiving and Disbursing Funds Services
2524 Payroll Services
2525 Financial Accounting Services
2526 Internal Auditing Services
2527 Property Accounting Services
2528 Risk Management Services
2529 Other Fiscal Services

**2540 Operation and Maintenance of Plant Services**

2541 Service Area Direction
2542 Care and Upkeep of Buildings Services
2543 Care and Upkeep of Grounds Services
2544 Maintenance
2546 Security Services
2549 Other Operation and Maintenance of Plant Services

**2550 Student Transportation Services**

2551 Service Area Direction
2552 Vehicle Operation Services
2558 Special Education Transportation Services
2559 Other Student Transportation Services

**2560 Alternative Transportation (2023 HB 3014)**

**2570 Internal Services**

2571 Service Area Direction
2572 Purchasing Services
2573 Warehousing and Distributing Services
2574 Printing, Publishing, and Duplicating Services
2579 Other Internal Services

2600 Support Services—Central Activities

**2610 Direction of Central Support Services**

**2620 Planning, Research, Development, Evaluation Services, Grant Writing, and Statistical Services**

2621 Service Area Direction
2622 Development Services
2623 Evaluation Services
2624 Planning Services
2625 Research Services
2626 Grant Writing
2627 Statistical Services
2628 Fundraising/Resource Development
2629 Other Planning, Research, Development, and Evaluation Services

**2630 Information Services**

2631 Service Area Direction
2632 Internal Information Services
2633 Public Information Services
2634 Management Information Services
2639 Other Information Services

**2640 Staff Services**

2641 Service Area Direction
2642 Recruitment and Placement Services
2643 Staff Accounting Services
2645 Health Services
2649 Other Staff Services

**2660 Technology Services**

2661 Service Area Direction
2662 Systems Analysis Services
2663 Programming Services
2664 Operations Services
2669 Other Technology Services

**2670 Records Management Services**

**2680 Interpretation and Translation Services**

**2690 Other Support Services–Central**

**2700 Supplemental Retirement Program**

## 3000 ENTERPRISE AND COMMUNITY SERVICES

**3100 Food Services**

3110 Service Area Direction
3120 Food Preparation and Dispensing Services
3130 Food Delivery Services
3190 Other Food Services

**3200 Other Enterprise Services**

**3300 Community Services**

3310 Direction of Community Services Activities
3320 Community Recreation Services
3330 Civic Services
3340 Public Library Services
3360 Welfare Activities Services
3370 Nonpublic School Students Services
3390 Other Community Services

**3500 Custody and Care of Children Services**

## 4000 FACILITIES ACQUISITION AND CONSTRUCTION

4100 Facilities Acquisition and Construction

4110 Service Area Direction
4120 Site Acquisition and Development Services
4150 Building Acquisition, Construction, and Improvement Services
4180 Other Capital Items
4190 Other Facilities Construction Services

## 5000 OTHER USES

**5100 Debt Service**

5110 Long-Term Debt Service
5120 Short-Term Debt Retirement

**5200 Transfers of Funds**

**5300 Apportionment of Funds by ESD**

**5400 PERS UAL Lump Sum Payment to PERS**

## 6000 CONTINGENCIES

6110 Operating Contingency

## 7000 UNAPPROPRIATED ENDING FUND BALANCE

# Expenditure Objects

## 100 SALARIES

110 Regular Salaries

- **111 Licensed Salaries**
- **112 Classified Salaries**
- **113 Administrators**
- **114 Managerial—Classified**
- **115 Sabbatical**
- **116 Supplemental Retirement Stipends**
- **117 Unused Leave**

120 Nonpermanent Salaries

- **121 Substitutes—Licensed**
- **122 Substitutes—Classified**
- **123 Temporary—Licensed**
- **124 Temporary—Classified**

**130 Additional Salary**

140-190 Additional Salary

## 200 ASSOCIATED PAYROLL COSTS

**210 Public Employees Retirement System**

- 211 Employer Contribution, Tier I and Tier II
- 212 Employee Contribution, Pick-Up
- 213 PERS UAL Contribution
- 214 PERS UAL Contribution
- 215 PERS UAL Contribution
- 216 Employer Contribution, Tier III

**220 Social Security Administration**

**230 Other Required Payroll Costs**

- 231 Workers' Compensation
- 232 Unemployment Compensation

240 Contractual Employee Benefits

**270 Post Retirement Health Benefits**

## 300 PURCHASED SERVICES

**310 Instructional, Professional and Technical Services**

- 311 Instruction Services
- 312 Instructional Programs Improvement Services
- 313 Student Services
- 316 Data Processing Services
- 317 Statistical Services
- 318 Professional and Improvement Costs for Non-Instructional Staff
- 319 Other Instructional, Professional and Technical Services

**320 Property Services**

- 321 Cleaning Services
- 322 Repairs and Maintenance Services
- 324 Rentals

325 Electricity
326 Fuel
327 Water and Sewage
328 Garbage
329 Other Property Services
**330 Student Transportation Services**
331 Reimbursable Student Transportation
332 Non-Reimbursable Student Transportation
333 Board and Room in Lieu of Transportation
334 Transportation Portion of Tuition Payments

**340 Travel**

341 Travel, Local in District
342 Travel, Out of District
343 Travel, Student, Out of District
349 Other Travel

**350 Communication**

351 Telephone
353 Postage
354 Advertising
355 Printing and Binding
359 Other Communication Services

**360 Charter School Payments**

370 Tuition

**371 Tuition Payments to Other Districts Within State**
**372 Tuition Payments to Other Districts Outside the State**
**373 Tuition Payments to Private Schools**
**374 Other Tuition**

**380 Non-Instructional Professional and Technical Services**

381 Audit Services
382 Legal Services
383 Architect/Engineer Services
384 Negotiation Services
385 Management Services
386 Data Processing Services
387 Statistical Services
388 Election Services
389 Other Non-Instructional Professional and Technical Services
390 Other General Professional and Technological Services

## 400 SUPPLIES AND MATERIALS

**410 Consumable Supplies and Materials**
**420 Textbooks**
**430 Library Books**
**440 Periodicals**
**450 Food**
**460 Non-Consumable Items**
**470 Computer Software**
**480 Computer Hardware**

## 500 CAPITAL OUTLAY

**510 Land Acquisition**

**520 Buildings Acquisition**

**530 Improvements Other Than Buildings**

**540 Depreciable Equipment**

541 Initial and Additional Equipment Purchase
542 Replacement Equipment Purchase

**550 Depreciable Technology**

560 Depreciable Bus Garage, Bus, and Capital Bus Improvements

**562 Bus Garage**
**564 Bus and Capital Bus Improvements**

**590 Other Capital Outlay**

## 600 OTHER OBJECTS

**610 Redemption of Principal**

620 Interest

**621 Regular Interest**
**622 Bus Garage, Bus, and Capital Improvement Interest**

**630 Unrecoverable Bad Debt Write-Off**

**640 Dues and Fees**

**650 Insurance and Judgements**

651 Liability Insurance
652 Fidelity Bond Premiums
653 Property Insurance Premiums
654 Student Insurance Premiums
655 Judgements and Settlements Against the District
659 Other Insurance and Judgements

**660 Depreciation (Used for Enterprise and Internal Service Funds Only)**

662 Buildings
663 Improvements Other Than Buildings
664 Equipment
665 Technology
669 Other Capital Assets

**670 Taxes and Licenses**

**680 PERS UAL Lump Sum Payment to PERS**

**690 Grant Indirect Charges**

## 700 TRANSFERS

## 800 OTHER USES OF FUNDS

**810 Planned Reserve**

**820 Reserved for Next Year**

## Expenditure Areas of Responsibility

010 Home Instruction
020 Tutoring
050 General Classroom Instruction
060 Core Areas/Block Classes
090 Other Pre-kindergarten Programs
**100 English**
**110 Social Studies**
**120 Science**
**130 The Arts**
170 Driver Education
**180 Mathematics**
190 Health Education
200 Physical Education
**210 Second Language**
230 Athletics
250 Other Extracurricular Student Activities
260 Technology
270 Career Related Learning
**280 English Language Learner Programs**
290 Other Programs
310 Non-Instructional Staff Development
**320 Special Education**
340 Coordinated Early Intervening Services
**350 School Improvement Fund Grant**

### PROFESSIONAL, TECHNICAL STRANDS

500 General Professional, Technical Strands
510 Arts and Communication
520 Business and Management
530 Health Services
540 Human Resources
550 Industrial and Engineering Systems
560 Natural Resources Systems
570 Other Professional, Technical Strands. Defined by the District.
580 Other Professional, Technical Strands. Defined by the District.
590 Other Professional, Technical Strands. Defined by the District.

# Descriptions of Balance Sheet Accounts

## ASSETS AND OTHER DEBITS

100 Current Assets

- 101 Cash in the Bank
- 102 Cash on Hand
- 103 Petty Cash
- 104 Change Cash
- 105 Cash with Fiscal Agents
- 106 Cash and Investments to Repay Short-Term Notes
- 111 Investments
- 112 Unamortized Premiums on Investments
- 113 Unamortized Documents on Investments (Credit)
- 114 Interest Receivable on Investments
- 115 Accrued Interest on Investments Purchased
- 121 Taxes Receivable
- 122 Estimated Uncollectible Taxes (Credit)
- 131 Interfund Loans Receivable
- 132 Interfund Accounts Receivable
- 141 Intergovernmental Accounts Receivable
- 151 Loans Receivable
- 152 Estimated Uncollectible Loans
- 153 Other Accounts Receivable
- 154 Estimated Uncollectible Accounts Receivable
- 161 Bond Proceeds Receivable
- 171 Inventories for Consumption
- 172 Inventories for Resale
- 181 Prepaid Expenses
- 191 Deposits
- 199 Other Current Assets

200 Fixed Assets

- 211 Sites
- 221 Site Improvements
- 222 Accumulated Depreciation Onsite Improvements
- 231 Buildings and Building Improvements
- 232 Accumulated Depreciation on Buildings and Building Improvements
- 241 Machinery and Equipment
- 242 Accumulated Depreciation on Machinery and Equipment
- 251 Construction in Progress

300 Budgeting Accounts and Other Debits

- 301 Estimated Revenues (Budget Account)
- 302 Revenues
- 303 Amount Available in Debt Service Funds
- 304 Amount to Be Provided for Retirement of General Long-Term Debt

## LIABILITIES, RESERVES, AND FUND BALANCES

400 Current Liabilities

- 401 Interfund Loans Payable
- 402 Interfund Accounts Payable
- 411 Intergovernmental Accounts Payable
- 421 Accounts Payable
- 422 Judgments Payable
- 423 Warrants Payable
- 431 Contracts Payable
- 432 Construction Contracts Payable—Retained Percentage
- 433 Construction Contracts Payable
- 441 Matured Bonds Payable
- 442 Bonds Payable
- 443 Unamortized Premiums on Bonds Sold
- 451 Loans Payable
- 455 Interest Payable
- 461 Accrued Salaries and Benefits
- 471 Payroll Deductions and Withholdings
- 481 Deferred Revenues
- 491 Deposits Payable
- 492 Due to Fiscal Agent
- 499 Other Current Liabilities

500 Long-Term Liabilities

- 511 Bonds Payable
- 521 Loans Payable
- 531 Lease Obligations
- 541 Unfunded Pension Liabilities
- 590 Other Long-Term Liabilities

600 Budgeting Accounts

- 601 Appropriations (Budget Account)
- 602 Expenditures
- 603 Encumbrances

700 Fund Equity

- 701 Investment in General Fixed Assets
- 721 Contributed Capital
- 730 Reserve for (Special Purposes)—Retained Earnings
- 740 Unreserved Retained Earnings
- 760 Other than Unassigned (Special Purposes)—Fund Balance
- 761 Non-Spendable Fund Balance
- 762 Restricted Fund Balance
- 763 Committed Fund Balance
- 764 Assigned Fund Balance
- 770 Unassigned Fund Balance

# Chapter 3

## Accounting Program Structure

An accounting program structure represents a conceptual organization of the school system's activities. It provides the basis for collecting, organizing, analyzing, and displaying financial information about the activities of a school district and provides for grouping of activities for assigning costs.

The accounting program structure for Oregon school districts is based on the following account dimensions:

- Fund
- Function
- Object
- Operational Unit
- Area of Responsibility
- Sub-Area

The account code segments allow several levels of detail. For example, a function code can provide four levels of information:

1111—Regular Elementary Instruction Function——1XXX—Instruction

Program———11XX—Regular Instruction

Service Area————111X—Regular Elementary Instruction

Grade Level—————1111—Regular Elementary Instruction K-5 or K-6

The state requires different levels of detail for various account segments for the Minimum Chart of Accounts. The requirements are outlined in the following sections, with the minimum level of detail indicated with **bold** font, except for area of responsibility.

## Minimum Chart of Accounts

The following **expenditure dimensions** are required for state reporting:

| Expenditure Dimension | Defined by | Required for | Number of Digits | Comments |
|---|---|---|---|---|
| Fund | State | All Accounts | 3 | The state defines only the first digit of each fund. |
| Function | State | All Accounts | 4 | |
| Object | State | All Accounts | 3 | |
| Operational Unit | District | All Accounts | 3 | Identifies a school or central district program or department. |
| Area of Responsibility | State | Some Accounts | 3 | See Area of Responsibility Dimension Required Table below. |
| Sub-Area | District | Not Required | | This is an optional category for district use. |

Fund, function, object, and operational unit are required for **all** expenditure accounts. Fund, function, and object are defined by the state. Operational unit is district-defined and is used to designate either a school or a central program or department.

Area of responsibility is state-defined and is required for certain functions, e.g., to indicate curriculum area at the secondary level. Additional account code segments, e.g., sub-area, are optional expenditure dimensions that are district-defined and should not be reported to the state.

## AREA OF RESPONSIBILITY DIMENSION REQUIRED

Note: An "X" indicates a rollup of accounts to the digits indicated. For example, a 12XX function represents all functions that have a "12" prefix.

| Function | Description | Designate |
|---|---|---|
| 1121 | Middle School/Junior High Instruction | Curriculum Area |
| 1131 | High School Instruction | Curriculum Area |
| 12XX | Special Education | Maintenance of Effort, if Applicable |
| 1271 | Remediation | Curriculum Area |
| 21XX | Special Education Support | Maintenance of Effort, if Applicable |
| 2190 | Special Education Direction | Maintenance of Effort, if Applicable |
| 2240 | Staff Development | Targeted Training, if Applicable |
| 2550 | Special Education Transportation | Maintenance of Effort, if Applicable |

## OPERATIONAL UNIT

Operational unit designates either a school or a central program or department. In general, school-based costs should be charged directly to the school (operational unit). The state calculates cost per student at the school level, and central costs will be allocated to the schools on a per-student basis. Grants should be charged to the school level when the information is available; e.g., Title I. Special Education programs should always be charged centrally. The following table indicates whether a function should be charged directly to the school, to a central number, or either or both. The Charge to Either column indicates some function expenditures would logically be charged to the school and others to a central department. For example, in expenditure function 2540 Operation and Maintenance of Plant Services, charge the building custodian to the school and a central maintenance worker to the central operational unit.

## OPERATIONAL UNIT USED AT SCHOOL LEVEL OR CENTRAL

| School | Either | Central |
|---|---|---|
| 1100 Instruction | 1200 Special Programs | 2300 Executive Admin |
| 2410 Principal's Office | 2100 Support of Students | 2510 Business Direction |
| 3500 Child Care | 2200 Support of Instruction | 2520 Fiscal Services |
| | 2490 Other School Administration | 2610 Central Direction |
| | 2540 Operation/Maintenance of Plant | 2620 Planning, Research & Dev |
| | 2550 Transportation | 2630 Information Services |
| | 2560 Alternative Transportation | 2640 Staff Services |
| | 2570 Purchasing, Warehouse, Printing | 2670 Records Management |
| | 2660 Technology Services | 5000 Other Uses |
| | 2680 Interpretation/Translation Services | |
| | 3100 Food Services | |
| | 3200 Enterprise Operations | |
| | 3300 Community Services | |
| | 4000 Facilities Acquisition/Construction | |

Charging school-based expenditures directly to the school, when possible, will produce more accurate cost information in most cases. Special Education costs, however, should be charged centrally because the wide variation of special needs and costs among schools could skew the calculation of cost per student at the school level.

When a district receives a grant, which can be identified at the school level, charge the grant to the school level.

## SPECIAL INSTRUCTIONS FOR RECORDING EXPENDITURES

The following procedures are intended to improve consistency among school districts in classifying expenditures.

## GASB STATEMENT 34 REPORTING REQUIREMENTS

Governmental Accounting Standards Board (GASB) Statement 34 represents one of the most comprehensive changes in financial reporting standards in history. This section will not attempt to address all issues relative to the implementation of these standards. District officials are encouraged to discuss their specific issues with their auditors. Detailed questions and answers relative to this topic can be found in the Guide to Implementation of GASB Statement 34 on Basic Financial Statements and Management's Discussion and Analysis for State and Local Governments published by GASB.

## GASB 34-RELATED CHANGES TO CHART OF ACCOUNTS

This section recaps the impact of GASB 34 on the chart of accounts. Additional details are provided within each of the impacted accounts.

### Funds

- 200 Special Revenue Funds – Food Service and Student Body funds should be classified within the 200 Special Revenue Funds. Food Services should not be classified as a 500 Enterprise Fund. Student Body funds should not be classified as 700 Trust or Agency Funds.
- 500 Enterprise Funds – In general, the use of 500 Enterprise Funds is discouraged.

### Objects

- ODE sets the capitalization threshold to $5,000; this is consistent with the federal level.
- Districts may use sub-objects under 460 Non-Consumable and 480 Computer Hardware for inventoried non-capitalized assets if districts choose to identify separately or have inventory systems tied to object codes.
- Add (Depreciable) to name of objects 540 Equipment and 550 Technology.
- Reorder 66x objects as follows:
    - 662 Buildings
    - 663 Improvements Other Than Buildings
    - 664 Equipment
    - 665 Technology
    - 669 Other Capital Assets
- Note in description for 66X that it is generally to be used only in 500 Enterprise and 600 Internal Service Funds.
- The following object codes have been modified to comply with depreciation requirements of GASB 34. Details can be found within their specific descriptions.
    - 460 Non-Consumable Items
    - 540 Depreciable Equipment
    - 660 Depreciation. (Used for 500 Enterprise and 600 Internal Service Funds only.)

## SPECIAL EDUCATION COSTS—MAINTENANCE OF EFFORT

The Individuals with Disabilities Education Act (IDEA) grant program requires local education agencies (LEAs) to meet maintenance of effort (MOE) as a condition of receiving these federal funds This means that LEAs may not reduce the amount of local, or state and local, general funds they spend for the education of children with disabilities below the amount they spent for the preceding fiscal year in which they met MOE. (34 CFR 300.203)

Charge special education expenditures to the appropriate function with an operational unit code. Attach the area of responsibility (AOR) code 320 Special Education when reporting special education expenditures in all funds. However, only the 100 General Fund is used in the MOE baseline calculations.

## SCHOOL MEDICAID BILLING AND IDEA MOE

According to 34 CFR 300.154(g)(2), reimbursements from federal funds, e.g. Medicaid, will not be considered state/local for the purposes of MOE. However, per the Office of Special Education Programs (OSEP), the state/local match payments that are used to draw down the federal Medicaid reimbursement must be included in the MOE calculation.

Example: Resource room teacher salary coded to 100-1250-111-XXX-320:

| Expenditure Dimension | Account Code | Description | Comments |
|---|---|---|---|
| Fund | 100 | General Fund | Generally, the state defines only the first digit of each fund. |
| Function | 1250 | Less Restrictive Programs for Students with Disabilities | |
| Object | 111 | Licensed Salaries | |
| Operational Unit | XXX | District Assigned Unit | District-assigned central id, rather than directly to schools. |
| Area of Responsibility | 320 | Special Education | |

## TRANSPORTATION OF SPECIAL EDUCATION STUDENTS

1. Charge costs of providing special education transportation to function 2550 Student Transportation Services and attach area code 320 Special Education, including salaries and associated payroll costs of bus drivers and attendants. Allocate costs, such as supplies, insurance, and maintenance between regular transportation and special education. Districts may track actual costs or allocate costs based on special education mileage.
2. Report on the purchase of new special education buses under function 2550 Student Transportation Services, area code 320 Special Education.

## REMEDIATION

Schools will be offering remedial courses to students who do not meet the state standards. Charge costs of remediation to function 1271 Remediation.

Example: Licensed salary cost for teaching remedial classes in math.

Debit Expenditure 100-1271-111-XXX-180

## ALTERNATIVE EDUCATION

Charge costs of alternative education programs to function 1280 Alternative Education and a central operational unit.

Example: Tuition payments to another agency to provide alternative education.

Debit Expenditure 100-1280-371-XXX

Example: Licensed salary cost for a teacher in district provided alternative education.

Debit Expenditure 100-1280-111-XXX

## SUBSTITUTE TEACHERS

Record the cost of substitutes in the function of the teacher that the substitute is replacing, if the teacher is absent due to illness, personal leave, etc. If the teacher is absent to participate in staff development, charge the substitute cost to function 2240 Instructional Staff Development.

Example: Substitute replaces a third grade teacher who is ill.
Debit Expenditure 100-1111-121-XXX
Example: Substitute replaces a fourth grade teacher who is attending a workshop on teaching math.

| | |
|---|---|
| Debit Expenditure | 100-2240-121-XXX or |
| Debit Expenditure | 100-2240-121-XXX-180 to designate math |

## STAFF DEVELOPMENT

Charge costs of staff development for licensed, classified, and administrative employees that are instructionally related to 2240 Instructional Staff Development, using the appropriate object.

Example: Record cost of supplies for math instruction training session which elementary teachers attend.

| | |
|---|---|
| Debit Expenditure | 100-2240-410-XXX or |
| Debit Expenditure | 100-2240-410-XXX-180 to designate math |

Charge non-instructional staff development to the appropriate function and object. Attach area code 310 Staff Development for tracking.

Example: Computer spreadsheet training materials for fiscal staff.

| | |
|---|---|
| Debit Expenditure | 100-2520-410-XXX-310 |

## GRANT ADMINISTRATIVE CHARGES

Record the indirect charges for grant administration directly to the grant, object code 690 Grant Indirect Charges. Pay the amount to the 100 General Fund, revenue account 1980 Fees Charged to Grants.

Example: Record administrative charge to staff development grant.

| | | |
|---|---|---|
| Debit Expenditure | 200-2240-690-XXX | |
| Credit Liabilities | 200-4020 | Due to other funds |
| Debit Assets | 100-1320 | Due from other funds |
| Credit Revenue | 100-1980 | Fees charged to grants |

## TRANSFERS TO OTHER FUNDS

Districts may make transfers from one fund to the 100 General Fund, 200 Special Revenue, 300 Debt Service, 400 Capital Projects, and 700 Trust and Agency Funds. Transfers are excluded from expenditures in the transferring fund to avoid double counting.

Example: Transfer money from the 100 General Fund to a 200 Special Revenue Fund.

| | | |
|---|---|---|
| Debit Expenditure | 100-5200-710 | Transfers to other funds |
| Credit Liabilities | 100-4020 | Due to other funds |
| Debit Assets | 200-1320 | Due from other funds |
| Credit Revenue | 200-5200 | Transfers from other funds |

## PAYMENTS TO INTERNAL SERVICE FUNDS

Districts should record payments, rather than transfers, from one fund to an internal service fund so that the expenditure is recorded in the operating fund.

Example: Record payment from the 100 General Fund to a 600 Internal Service Fund. District contribution for employee insurance for primary teachers is charged to the 100 General Fund and paid to the Insurance Reserve Fund.

| | | |
|---|---|---|
| Debit Expenditure | 100-1111-240-XXX | |
| Credit Payroll Liability | 100-4610 | |
| Debit Payroll Liability | 100-4610 | |
| Credit Revenue | 600-1970 | Services to other funds |

Expenditures in 600 Internal Service Funds will be excluded from per-student cost calculations to avoid double counting. Do not make transfers to 600 Internal Service Funds.

## SUPPLEMENTAL RETIREMENT PROGRAMS

Cost of providing district retirement incentive benefits to current employees and sustaining those benefits to prior employees.

Record the current year district contribution to the program in the designated fund and function 2700 Supplemental Retirement Program. Pay the contribution amount to a Supplemental Retirement Fund, which should be classified as a 700 Trust Fund or directly from 100 General Fund to retirees. The district may use the contributions to pay current obligations to retirees and/or to accumulate reserves for outstanding liabilities.

Example:

| | | |
|---|---|---|
| Debit Expenditure | 100-2700-240-XXX | |
| Credit Liabilities | 100-4020 | Due to other funds |
| Debit Assets | 700-1320 | Due from other funds |
| Credit Revenues | 700-1990 | |

## STUDENT BODY FUNDS

Student Body funds that are controlled by school district personnel should be budgeted and treated as governmental funds (200 Special Revenue Funds). Report expenditures at the school level using an operational unit code. Student Body Funds are raised or collected by and/or for school approved student groups in which the school district prescribes the purposes for how money is obtained and used. Examples of Student Body Funds would include:

> textbook security deposits, locker deposit, physical education attire fees, towel fee, musical instrument fee, optional course fee, admission fee, optional field trips, voluntary health and accident insurance plans, and fundraisers.

## CLASSIFYING SALARY EXPENDITURES

Staff should be charged to the function code that reflects actual job duties and responsibilities rather than job title. Example: Cost of a Deputy Superintendent who splits job duties between general administration and Director of Special Education.

| | |
|---|---|
| Debit Expenditures | 100-2190-113-320 |
| | 100-2320-113 |

## BOND REFUNDING GUIDELINES

5000 Other Sources

- 5110 Bond Proceeds – Reports the face amount of the refunding bonds issued
- 5120 Bond Premium – Reports the premium, or discount, on refunding bonds
- 5130 Accrued Interest – Reports accrued interest, if any, on the refunding bond proceeds

5000 Other Uses

- 5110-610 Long-Term Debt Service-Redemption of Principal – Reports the amount deposited to the refunding escrow agent
- 5110-640 Long-Term Debt Service-Dues and Fees – Reports the fees paid in connection with the issuance of the refunding bonds

# Chapter 4

## Accounting Manual Definitions

### FUND CLASSIFICATIONS

**100** **General Fund.** Accounts for all financial resources of the districts except those required to be accounted for in another fund.

**200** **Special Revenue Funds.*** Account for the proceeds of specific revenue sources (other than expendable trusts or major capital projects) that are legally restricted to expenditure for specified purposes. Some examples of special revenue funds might include restricted state or federal grants-in aid or restricted tax levies. A separate fund may be used for each restricted source, or one fund may be used, supplemented by the dimension project/reporting code; e.g., bus replacement fund. Food Service and Student Body Funds should be classified here.

*Strictly for reporting purposes within ODE's data collections:

**201** Federal Revenue Sources and Expenditures

**250** State, Local, and Other Revenue Sources and Expenditures

**251** Student Investment Account

**252** Measure 98: High School Success

**299** Child Nutrition Programs – Food Service Sources and Expenditures

*Section 1111(h)(1)(C)(x) of the Elementary and Secondary Education Act of 1965 (ESEA), as amended by the Every Student Succeeds Act (ESSA) requires the reporting of: "the per-pupil expenditures of Federal, State, and local funds, including actual personnel expenditures and actual non-personnel expenditures of Federal, State, and local funds, disaggregated by source of funds, for each local educational agency and each school in the State for the preceding fiscal year."*

**300** **Debt Service Funds.** Account for the accumulation of resources for, and the payment of, general long-term debt, principal and interest.

**400** **Capital Projects Funds.** Account for financial resources used to acquire or construct major capital facilities (other than those of proprietary funds and trust funds). The most common source of revenue in this fund would be the sale of bonds. A separate fund may be used for each capital project, or one fund may be used, supplemented by the dimension project/reportingcode.

**500** **Enterprise Funds.** Account for operations that are financed and operated in a manner similar to private business enterprises where the stated intent is that the costs (expenses, including depreciation and indirect costs) of providing goods or services to the students or general public on a continuing basis are financed or recovered primarily through user charges. Enterprise funds are also used to account for operations where the school board or state regulatory agency has decided that periodic determination of revenues earned, expenses incurred, and net income is appropriate for capital maintenance, public policy, management control, accountability, or other purposes. Some examples of enterprise funds might include funds used for the bookstore operation, the athletic stadium, and the community swimming pool. Few school districts have activities that would require the use of Enterprise funds. Do not include Food Service or Student Body Funds here.

**600** **Internal Service Funds.** Account for the operation of district functions that provide goods or services to other district functions, other districts, or to other governmental units, on a cost-reimbursable basis. Some examples of internal service funds could include those used for central warehousing and purchasing, central data processing, central printing and duplicating, self-insurance fund and unemployment fund.

**700** **Trust and Agency Funds.** Account for assets held by a district in a trustee capacity or as an agent for individuals, private organizations, other governmental units, and/or other funds. Trust funds would include nonexpendable trust funds, expendable trust funds, and pension trust funds. Agency funds could include funds for a teacher or a parent-teacher organization. Do not include Food Service or Student Body Funds here.



## Revenue Sources

This dimension permits classification of revenues by source. The primary classification differentiates local, intermediate, state, and federal revenue sources.

### 1000 REVENUE FROM LOCAL SOURCES.

1100 Taxes. Compulsory charges levied by a governmental unit for the purpose of financing services performed for the common benefit.

**1110** **Ad Valorem Taxes Levied by District.** Taxes levied by a district on the assessed valuation of real and personal property located within the district which, within legal limits, is the final authority in determining the amount to be raised for school purposes. These resources are considered Local Revenue for the purposes of the State School Fund Formula.

1111 Current Year's Taxes. Property taxes levied by a district on the assessed value of real property located within the district which, within legal limits, is the final authority in determining the amount to be raised for school purposes.

1112 Prior Year's Taxes. Taxes collected for fiscal periods preceding the current year.

1113 County Tax Sales for Back Taxes. Revenue received as a result of the sale of property to satisfy a property tax lien.

1114 Payments in Lieu of Property Taxes. Amounts received in lieu of property taxes, including Western Oregon Severance Tax, Eastern Oregon Severance Tax, and tax court settlements.

**1115** **Payments in Lieu of Property Taxes – Enterprise Zones School Support Fee.** Amounts collected as a result of House Bill 2009 from the 2023 legislative session which allows local municipalities to include a fee for student support. These resources are considered Local Revenue for the purposes of the State School Fund Formula.

**1120** **Local Option Ad Valorem Taxes Levied by District.** Local option taxes levied by a district on the "Tax Gap" valuation of real and assessed property located within the district which, within legal limits, is the final authority in determining the amount to be raised for school purposes. Tax Gap refers to the difference between the Measure 5 tax limit (.005 * Real Market Value) and the Measure 50 Tax Limit (Sum of permanent and gap bond tax rates times Assessed Value). ORS 327.011 identifies Local Options thresholds that if exceeded are considered Local Revenue for the purposes of the State School Fund Formula. Record the excess in source 1110 Taxes.

1121 Current Year's Local Option Taxes. Local option property taxes levied by a district on the assessed value of real property located within the district which, within legal limits, is the final authority in determining the amount to be raised for school purposes.

1122 Prior Year's Local Option Taxes. Local option taxes collected for fiscal periods preceding the current year.

1123 Penalties and Interest on Local Option Taxes. Amounts collected as penalties for the payment of local option taxes after the due date, and the interest charged on delinquent local option taxes from the due date to the date of actual payment.

**1130 Construction Excise Tax.** Amounts collected as a result of Senate Bill 1036 from the 2007 legislative session which allows for a construction excise tax.

**1190 Penalties and Interest on Taxes.** Amounts collected as penalties for the payment of taxes after the due date, and the interest charged on delinquent taxes from the due date to the date of actual payment. These resources are considered Local Revenue for the purposes of the State School Fund Formula.

**1200 Revenue From Local Governmental Units Other Than Districts.** Revenue from the appropriations of another local governmental unit. The district is not the final authority, within legal limits, in determining the amount of money to be received, and the money is raised by taxes or other means which are not earmarked for school purposes. Payments from publicly owned utilities and local housing authorities are recorded here. (Planned Unit Development PUDs, rural telephone exchanges, etc.)

1300 Tuition. Money received from individuals, welfare agencies, private sources, and other districts for education provided in the district. (When tabulating total income from tuition at the federal level, only items 1311, 1321, and 1331 are tabulated.)

1310 Regular Day School Tuition. Money received as tuition for students attending the regular day schools in the district, including alternative programs entitled to State School Fund support. Use 1310 when instruction and related services are tied directly to the student.

**1311 Tuition From Individuals.** Money received from individuals, private sources, or welfare agencies as tuition in regular day schools.

**1312 Tuition From Other Districts Within the State.** Money received for regular day schools tuition from other districts within the state.

**1313 Tuition From Other Districts Outside the State.** Money received for regular day schools tuition from districts outside the state.

**1320 Adult/Continuing Education Tuition.** Money received as tuition for students attending adult/continuing education schools in the district.

1321 Tuition From Individuals. Money received from individuals for education provided by the district.

1322 Tuition From Other Districts Within the State. Money received from districts for education provided by the district.

1323 Tuition From Other Districts Outside the State. Money received from districts for education provided by the district.

1324 Tuition/Contract Receipts for Community Services.

**1330 Summer School Tuition.** Money received as tuition for students attending summer school.

1331 Tuition From Individuals.

1332 Tuition From Other Districts Within the State.

1333 Tuition From Other Districts Outside the State.

1400 Transportation Fees. Money received from individuals, private sources, welfare agencies, and other districts for transporting students to and from school and school activities (When tabulating total income from transportation at the federal level, only items 1411 and 1421 are tabulated.).

1410 Regular Day School Transportation. Money received for transporting students to and from regular day schools and school activities, including alternative programs entitled to State School Fund support.

**1411 Transportation Fees From Individuals.**

**1412 Transportation Fees From Other Districts Within the State.**

**1413 Transportation Fees From Other Districts Outside the State.**

**1420 Summer School Transportation.** Money received for transporting students to and from summer school.

1421 Transportation Fees From Individuals.

1422 Transportation Fees From Other Districts Within the State.

1423 Transportation Fees From Other Districts Outside the State.

**1500 Earnings on Investments.** Money received as profit from holdings for savings.

1510 Interest on Investments. Interest received on temporary or permanent investment in United States Treasury bills, notes, bonds; savings accounts; time certificates of deposit; notes; mortgages; or other interest-bearing obligations. Arbitrage rebates would be recorded in account 1510.

1530 Gain or Loss on Sale of Investments. Gains or losses realized from the sale of bonds or stocks. Gains represent the excess of the sales proceeds over cost or other basis at date of sale (cost less amortization of premium in the case of long-term bonds purchased at a premium over par value or cost plus accretion of discount on long-term bonds purchased at a discount under par value). Gains realized from sale of U.S. Treasury bills represent interest income and should be credited to account 1510 Interest on Investments. Losses represent the excess of the cost or other basis at date of sale over the sales proceeds.

**1600 Food Service.** Revenue for dispensing food to students and adults.

1610 Daily Sales — Reimbursable Programs. Revenue from students for the sale of breakfasts, lunches, and milk which are considered reimbursable by the U.S. Department of Agriculture. Federal reimbursements are not entered here. They should be recorded under code 4500 Restricted Revenue From the Federal Government Through the State.

1611 Breakfast. Money received from students for the sale of reimbursable breakfasts as part of the School Breakfast Program.

1612 Lunch. Money received from students for the sale of reimbursable lunches as part of the National School Lunch Program.

1613 Special Milk Program. Money received for the sale of reimbursable milk as part of the Special Milk Program.

1620 Daily Sales — Non-Reimbursable Program. Money received from students or adults for the sale of non-reimbursable breakfasts, lunches, and milk. This category would include all sales to adults, the second Type A lunch to students, and a la carte sales.

1630 Special Functions. Money received from students, adults or organizations for the sale of food products and services is considered special functions. Some examples would include potlucks, parent-teacher association sponsored functions, and athletic banquets.

**1700 Extracurricular Activities.** Revenue from school - sponsored activities.

1710 Admissions. Revenue from patrons of a school - sponsored activity, such as a concert or football game.

1720 Bookstore Sales. Revenue from sales by students or student-sponsored bookstores.

1730 Student Organization Membership Dues and Fees. Revenue from students for memberships in school clubs or organizations.

1740 Fees. Revenue from students for fees, such as locker fees, towel fees, and equipment fees. Transportation fees are recorded under account 1400 Transportation Fees.

1750 Concessions.

1760 Club Fundraising.

1790 Other Extracurricular. Other revenue from extracurricular activities.

**1800 Community Services Activities.** Revenue from community services activities operated by a district. For example, revenue received from the operation of a swimming pool as a community service would be recorded here. Multiple accounts may be established within the 1800 series to differentiate various activities.

1900 Other Revenue From Local Sources. Other revenue from local sources which are not classified above.

**1910 Rentals.** Revenue from the rental of either real or personal property owned **by the school.**

**1920 Contributions, Donations, and General Fundraising From Private Sources.** Money received from a philanthropic foundation, private individuals, or private organizations for which no repayment or special service to the contributor is expected. Separate accounts may be maintained for unrestricted revenue and revenue which is restricted as to uses. General fundraising resources not related to student activities.

**1930 Rental or Lease Payments from Private Contractors.** Payments received from private contractors for the use of district-owned buses and garages in the operation of the pupil transportation system by the private contractor.

**1940 Services Provided Other Local Education Agencies.** Revenue from services provided in other districts, other than for tuition and transportation services. These services include: data processing, purchasing, maintenance, cleaning, consulting, and guidance. Intermediate units will use this code in identifying revenue for services provided to districts. Use 1940 when the ESD or district is providing general services to support instruction.

1941 Services Provided Other Districts Within the State. Revenue from services to districts within the state.

1942 Services Provided Other Districts Outside the State. Revenue from services to districts outside the state.

1943 Services Provided Other Charter Schools. Revenue from services to Charter Schools.

**1950 Textbook Sales and Rentals.** Revenue from the rental or sale of textbooks.

1951 Textbook Sales. Revenue from the sale of textbooks.

**1960 Recovery of Prior Years' Expenditure.** Refund of expenditure made in a prior fiscal year.

**1970 Services Provided Other Funds.** Services provided other funds, such as printing or data processing. Generally, this account is only used in Internal Service Funds.

**1980 Fees Charged to Grants.** Indirect administrative charges assessed to grants.

**1990 Miscellaneous.** Revenue from local sources not provided elsewhere. Record Medicaid Administrative Claiming (MAC) reimbursements, E-Rate, and 1999 SB1149 Energy revenues received here.

## 2000 REVENUE FROM INTERMEDIATE SOURCES.

2100 Unrestricted Revenue. Revenue received as grants by the district can be used for any legal purpose desired by the district without restriction. Separate accounts may be maintained for general source grants-in-aid which are not related to specific revenue sources of the intermediate governmental unit, and for those assigned to specific sources of revenue as appropriate.

**2101 County School Funds.** Revenue from the apportionment of the resources of the County School Fund, except Federal Forest Fees, which is recorded in account 4801. ORS 328.005 to 328.035. These resources are considered Local Revenue for the purposes of the State School Fund Formula.

**2102** **General Education Service District Funds.** Revenue received by the district that is not referred to in other specific intermediate or other sources from an intermediate agency.

**2103** **Excess ESD Local Revenue.** Local revenue that exceeds what is guaranteed to the ESD through the funding formula (property taxes). These resources are considered Local Revenue for the purposes of the State School Fund Formula.

**2105** **Natural Gas, Oil, and Mineral Receipts.**

**2110** **Intermediate 'I' Tax.** Revenue received from city and county income taxes.

2111 Current Year's 'I' Taxes. Income Taxes collected by the city or county for fiscal periods for the current year.

2112 Prior Year's 'I' Taxes. Income Taxes collected by the city or county for fiscal periods preceding the current year.

2113 Penalties and Interest on 'I' Taxes. Amounts collected as penalties for the payment of income taxes after the due date, and the interest charged on delinquent income taxes from the due date to the date of actual payment.

**2199** **Other Intermediate Sources.** Revenue for the Heavy Equipment Rental Tax (HERT) is recorded here.

**2200** **Restricted Revenue.** Revenue received as grants by the district which must be used for a categorical or specific purpose. If such money is not completely used by the district, it must be returned, usually, to the intermediate governmental unit. Separate accounts may be maintained for general source grants-in-aid which are not related to specific revenue sources of the intermediate governmental unit, and for those assigned to specific sources of revenue as appropriate.

**2800** **Revenue in Lieu of Taxes.** Payments made out of general revenues by an intermediate governmental unit to the district in lieu of taxes it would have had to pay had its property or other tax base been subject to taxation by the district on the same basis as privately owned property or other tax base. It would include payments made for privately owned property which is not subject to taxation on the same basis as other privately owned property due to action by the intermediate governmental unit. ORS 530.110. These resources are considered Local Revenue for the purposes of the State School Fund Formula.

**2900** **Revenue for/on Behalf of the District.** Payments made by an intermediate governmental jurisdiction for the benefit of the district, or contributions of equipment or supplies. It includes the payment to a pension fund by the intermediate governmental unit on behalf of a district employee for services rendered to the district, and a contribution of fixed assets by an intermediate governmental unit to the district. Separate accounts should be maintained to identify the specific nature of the revenue item.

An offsetting charge would be made to the appropriate expenditure account as if the district had expended the funds itself.

## 3000 REVENUE FROM STATE SOURCES.

3100 Unrestricted Grants-In-Aid. Revenue recorded as grants by the district from state funds which can be used for any legal purpose desired by the district without restriction.

**3101** **State School Fund—General Support.** ORS 327.006 to 327.013.

**3102** **State School Fund—School Lunch Match.** That portion of the grant from the State School Fund which is earmarked by the district for the required matching of Section 4 federal school lunch grant received by the district.

**3103** **Common School Fund.** ORS 327.403. These resources are considered Local Revenue for the purposes of the State School Fund Formula.

**3104** **State Managed County Timber.** Revenue is in addition to that distributed through the county school fund. ORS 530. These resources are considered Local Revenue for the purposes of the State School Fund Formula.

**3106** **State School Fund-Accrual.** That portion of the State School Fund paid in July and accrued to prior year.

**3199** **Other Unrestricted Grants-in-aid.**

3200 Restricted Grants-In-Aid. Revenue recorded as grants by the district from state funds which must be used for a categorical or specific purpose.

**3204** **Driver Education.**

**3222** **State School Fund (SSF) Transportation Equipment.** ORS 327.033.

**3299** **Other Restricted Grants-in-aid.** Use 3299 for restricted grants in aid from the state, e.g. Student Investment Account, High School Success and Lottery Bond dollars.

**3800** **Revenue in Lieu of Taxes.** Payments made out of general revenue by a state to the district in lieu of taxes it would have had to pay had its property or other tax base been subject to the taxation by the district on the same basis as privately owned property or other tax base. It would include payments made for privately owned property which is not subject to taxation on the same basis as other privately owned property due to action by the state. These resources are considered Local Revenue for the purposes of the State School Fund Formula.

**3900** **Revenue for/on Behalf of the District.** Payment made by a state for the benefit of the district, or contributions of equipment or supplies. It includes the payment of a pension fund by the state on behalf of a district employee for services rendered to the district, and a contribution of fixed assets by a state unit to the district. Separate accounts may be maintained to identify the specific nature of the revenue item.

An offsetting charge would be made to the appropriate expenditure account as if the district had expended the funds itself.

## 4000 REVENUE FROM FEDERAL SOURCES.

**4100** **Unrestricted Revenue Direct From the Federal Government.** Revenue direct from the federal government as grants to the district which can be used for any legal purpose desired by the district without restriction. Separate sub-accounts may be maintained to segregate grants for different purposes. Example: Revenue from federal Wildlife Refuge is recorded here.

**4200** **Unrestricted Revenue From the Federal Government Through the State.** Revenues from the federal government through the state as grants which can be used for any legal purpose desired by the district without restriction. Separate sub-accounts may be maintained to segregate grants for different purposes.

**4201** **Transportation Fees for Foster Children**

**4202** **Medicaid Reimbursement for Eligible K-12 Expenses (Ages Five to Twenty-One)** Revenue received from the Oregon Health Authority (OHA) for Medicaid reimbursement for services pursuant to an Individualized Education Program (IEP).

**4300** **Restricted Revenue Direct From the Federal Government.** Revenues direct from the federal government as grants to the district which must be used for a categorical or specific purpose. If such money is not completely used by the district, it usually is returned to the governmental unit. Separate sub-accounts may be maintained to segregate grants for different purposes.

**4500** **Restricted Revenue From the Federal Government Through the State.** Revenues from the federal government through the state as grants to the district which must be used for a categorical or specific purpose. If such money is not completely used by the district, it usually is returned to the government unit. Separate sub-accounts may be maintained to segregate grants for different purposes. Examples of revenues to be recorded here are: Elementary and Secondary Education Act (ESEA) Programs, Vocational Programs, Child Nutrition and School Nutrition Programs, Title I, Bilingual ELL, Vocational Education, IDEA 2004 (PL 108-446) Adult Education.

**4501** **Medicaid Reimbursement for Eligible Early Intervention (EI) Services (Birth to Age Three)** Revenue received from the Oregon Health Authority (OHA) for Medicaid reimbursement for EI services provided pursuant to an Individualized Family Service Plan (IFSP).

**4502** **Medicaid Reimbursement for Eligible Early Childhood Special Education (ECSE) Services (Ages Three to Five)** Revenue received from the Oregon Health Authority (OHA) for Medicaid reimbursement for ECSE services provided pursuant to an Individualized Family Service Plan (IFSP).

**4700** **Grants-In-Aid From the Federal Government Through Other Intermediate Agencies.** Revenues from the federal government through an intermediate agency.

4800 Revenue in Lieu of Taxes. Payments made out of general revenues by the federal government unit to the district in lieu of taxes it would have had to pay had its property or other tax base been subject to taxation by the district on the same basis as privately owned property or other tax base. It would include payment made for privately owned property which is not subject to taxation on the same basis as other privately owned property due to action by the federal government unit.

**4801** **Federal Forest Fees.** ORS 294.060.

**4802** **Impact Aid to School Districts for Operation (PL 874).**

**4803** **Coos Bay Wagon Road Funds.** These resources are considered Local Revenue for the purposes of the State School Fund Formula.

**4899** **Other Revenue in Lieu of Taxes.** These resources are considered Local Revenue for the purposes of the State School Fund Formula.

**4900** **Revenue for/on Behalf of the District.** Payments made by the federal government for the benefit of the district, or contributions of equipment or supplies. It includes a contribution of fixed assets by a federal governmental unit to the district and foods donated by the federal government to the district. Separate accounts should be maintained to identify the specific nature of the revenue item.

An offsetting charge would be made to the appropriate expenditure account as if the district had expended the funds itself.

## 5000 OTHER SOURCES.

**5100** **Long-Term Debt Financing Sources.** The principal portion from the sale of bonds.

5110 Bond Proceeds. Receipts of proceeds from the sale of bonds.

5120 Bond Premium.

5130 Accrued Interest. Revenue from accrued interest from the sale of bonds.

5140 Mortgage Receipts.

5150 Loan Receipts.

5160 Lease Purchase Receipts.

**5200** **Interfund Transfers.** Revenue earned or received from another fund which will not be repaid.

**5300** **Sale of/or Compensation for Loss of Fixed Assets.** Revenue from the sale of school property or compensation for the sale or loss of fixed assets.

**5400** **Resources—Beginning Fund Balance.**

# Expenditure Functions

Function describes the type of activity that is carried out. The five major functional areas are:

1000—Instruction,

2000—Support Services,

3000—Enterprise and Community Services,

4000— Facilities Acquisition and Construction, and

5000—Other Uses.

The four-digit function codes are sub-functions to provide program and service area information. Functions and sub-functions consist of activities which have similar general operational objectives.

## 1000 INSTRUCTION.

Activities dealing directly with the teaching of students, or the interaction between teacher and students. Teaching may be provided for students in a school classroom, in another location, such as a home or hospital, or in other learning situations, such as those involving co-curricular activities. It may also be provided through some other approved medium, such as computer instruction applications, television, radio, telephone, and correspondence. Included here are the activities of instructional assistants of any type that assist in the instructional process. Expenditures for teachers' travel within the district in connection with teaching assignments are considered costs of instruction.

1100 Regular Programs. Instructional activities designed primarily to prepare students for activities as citizens, family members, and workers, as contrasted with programs designed to improve or overcome physical, mental, social, and/or emotional handicaps. Regular programs include: Elementary, K-5 or K-6; Middle or Junior High; High School; and Pre-kindergarten. Districts should charge classroom expenditures according to the definitions as long as the allocation of costs can be reasonably determined or estimated.

**1111** **Elementary, K-5 or K-6.** Learning experiences concerned with knowledge, skills, appreciation, attitudes, and behavioral characteristics considered to be needed by all students in terms of their awareness of life within our culture and the world of work and which normally may be achieved during the elementary school years.

**1113** **Elementary Extracurricular.** School-sponsored activities, under the guidance and supervision of district staff, are designed to provide students with experiences, such as motivation, enjoyment, and improvement of skills. Extracurricular activities normally supplement the regular instructional program.

**1121** **Middle/Junior High Programs.** Learning experiences concerned with knowledge, skills, appreciation, attitudes, and behavioral characteristics considered to be needed by all students in terms of understanding themselves, their relationships with society, and various career clusters; which normally may be achieved during the middle and/or junior high school years. Area of responsibility codes are required with this function.

**1122** **Middle/Junior High School Extracurricular.** School-sponsored activities, under the guidance and supervision of district staff, are designed to provide students with experiences, such as motivation, enjoyment, and improvement of skills. Extracurricular activities normally supplement the regular instructional program and include such activities as athletics, band, chorus, choir, speech, and debate. Also included are student-financed and managed activities.

**1131** **High School Programs.** Learning experiences concerned with knowledge, skills, appreciation, attitudes, and behavioral characteristics are considered to be needed by all students as they achieve graduation requirements. Area of responsibility codes are required with this function.

**1132** **High School Extracurricular.** School-sponsored activities, under the guidance and supervision of district staff, are designed to provide students with experiences, such as motivation, enjoyment, and improvement of skills. Extracurricular activities normally supplement the regular instructional program and include such activities as athletics, band, chorus, choir speech, and debate. Also included are student-financed and managed activities.

**1140** **Pre-kindergarten Programs.** Educational programs that are designed for the education and training of children, who are enrolled in prekindergarten programs.

1200 Special Programs. Instructional activities designed primarily to deal with students having special needs. The Special Program Service Area includes: (1) talented and gifted, (2) children with disabilities, (3) disadvantaged children, and (4) special programs for other student populations.

**1210** **Programs for the Talented and Gifted.** Special learning experiences for students identified as gifted or talented.

**1220** **Restrictive Programs for Students with Disabilities.** Special learning experiences for students with disabilities who spend ½ or more of their time in a restricted setting. These learning experiences include but are not limited to such areas as Structured and Intensive Learning Centers, Developmental Kindergarten, Community Transition Centers, Life Skills with Nursing, Out of District programs, Home Instruction, Extended School Year programs, Diagnostic Classrooms, and Functional Living Skills.

1221 Learning Centers – Structured and Intensive.

1222 Developmental Kindergarten.

1223 Community Transition Centers.

1224 Life Skills with Nursing.

1225 Out of District Programs.

1226 Home Instruction.

1227 Extended School Year Programs. As defined in OAR 581-015- 2065(7).

1228 Diagnostic Classrooms.

1229 Other.

**1250** **Less Restrictive Programs for Students with Disabilities.** Special learning experiences for students with disabilities outside the regular classroom. These learning experiences include but are not limited to such areas as Resource Rooms where students with disabilities go during certain periods of the school day to receive remedial instruction in specific subject areas or other remedial activities. All special education expenditures, including 1250, need to be reported to the state at the school level.

**1260** **Treatment and Habilitation.** Services designed to address a child's developmental deficits in sensory, motor, communication, self-help, and socialization areas. May be used for birth to 5 (pre-K) special education. Do not use area code 340 Early Intervening Services.

1270 Educationally Disadvantaged. Instructional activities designed for students who are disadvantaged due to socioeconomic status or other circumstances that can affect their ability to learn.

**1271** **Remediation.** Instructional activities designed to improve the achievement of regular education students who are not meeting state performance standards. Activities take place outside regular class time; e.g., after school, Saturday School, and Summer School. 1271 includes programs outside the regular classroom (i.e., pull-out programs) in addition to those outside the regular school day. Also, use function 1271 for Summer School remedial classes specifically designed to improve student performance to meet state standards. Also use for instructional expenses related to historically underserved students. Area of responsibility codes are required with this function.

**1272** **Title IA/D.** Record Title IA/D instructional activities here.

**1280** **Alternative Education.** Learning experiences for students who are at risk of dropping out of school; who are not succeeding in a regular classroom setting; or who may be more successful in a non-traditional setting. Includes instructional programs operated to meet the needs of at-risk youth and students who have dropped out of school. Also includes enrichment programs for talented and gifted students provided in an alternative setting, such as university coursework. Online curriculums would be coded here.

1281 Public Alternative Programs. Alternative learning experiences provided by other public agencies, including community colleges, other school districts, education service districts, etc.

1282 Private Alternative Programs. Alternative learning experiences provided by private contractors.

1283 -1287 District Alternative Programs. Alternative learning experiences provided by the school district.

1288 Charter Schools. Expenditures related to an Oregon public charter school.

1289 Other Alternative Programs. Other alternative learning experiences that cannot be classified above.

1290 Designated Programs. Special learning experiences for other students with special needs; i.e., English Language Learner students, teen parents, and migrant education.

**1291** **English Language Learner (ELL) – As per ORS 336.079, instructional activities for ELL students used in acquisition of the English language. Pro-rate duties as applicable.** (For additional guidance, see Appendix E Guidelines for ELL and Non-ELL Related Expenditures.)

**1292** **Teen Parent Programs.** Instructional programs designed to accommodate the needs of teen parents.

**1293** **Migrant Education.** Instructional programs designed to meet the needs of migrant students.

**1294** **Youth Corrections Education.** Instructional programs delivered to youth in detention.

**1295** **English Language Learner (ELL) – Instructional Activities not related to ORS 336.079 for ELL students used in acquisition of the English language. Pro-rate duties as applicable.** (For additional guidance, see Appendix E Guidelines for ELL and Non-ELL Related Expenditures.)

**1299** **Other Programs.** Do not use 1299 for children with Individualized Education Programs (IEP).

**1300 Adult/Continuing Education Programs.** Learning experiences designed to develop knowledge and skills to meet immediate and long-range educational objectives of adults who, having completed or interrupted formal schooling, have accepted adult roles and responsibilities. Programs include activities to: foster the development of fundamental tools of learning, prepare students for a post-secondary career, prepare students for post- secondary education programs, upgrade occupational competence, prepare students for a new or different career, develop skills and appreciation for special interest, or enrich the aesthetic qualities of life.

**1400 Summer School Programs.** Instructional activities as defined under 1100 Regular Programs carried on during the period between the end of the regular school term and the beginning of the next regular school term; this does not include the summer term of a 12-month school year. Use function 1271 Remediation for summer school remedial classes designed to improve student performance to meet state standards. Do not use this number for 1227 Extended School Year (ESY) Programs. Alternative programs that run through the summer are alternative programs, not summer school.

1410 Elementary. Instructional activities as defined under 1100 Regular Programs, Elementary, K-5 or K-6 (Effective 7/1/2011), carried on during the period between the end of the regular school term and the beginning of the next regular school term.

1420 Middle/Junior High. Instructional activities as defined under 1100 Regular Programs, 1121 Middle/Junior High School Programs, carried on during the period between the end of the regular school term and the beginning of the next regular school term.

1430 High School. Instructional activities as defined under 1100 Regular Programs, 1131 High School Programs, carried on during the period between the end of the regular school term and the beginning of the next regular school term.

1460 Special Programs, Summer School. Instructional activities as defined under 1100 Regular Programs, 1200 Special Programs, carried on during the period between the end of the regular school term and the beginning of the next regular school term.

1490 Other Summer School Programs. Other summer school programs which cannot be defined above.

## 2000 SUPPORT SERVICES.

Support services are those services which provide administrative, technical, personal (e.g., guidance and health), and logistical support to facilitate and enhance instruction. Support services exist to sustain and enhance instruction and would not otherwise exist if not for instructional programs.

2100 Support Services—Students. Activities which are designed to assess and improve the well-being of students and/or supplement the teaching process.

**2110 Attendance and Social Work Services.** Activities which are designed to improve student attendance at school, which attempt to prevent or solve students' problems involving the home, the school, and/or the community. Use for administrative services for Home Schooling as well as drug and alcohol programs.

2111 Service Area Direction. Activities associated with directing and managing attendance and social work services.

2112 Attendance Services. Activities, such as prompt identification of attendance patterns, promotion of positive attendance attitudes, response to attendance problems and enforcement of compulsory attendance laws.

2113 Social Work Services. Activities, such as: investigating and diagnosing student problems, casework and group work for students and parents, interpretation of student problems for other staff members, and advocacy for change in circumstances surrounding the individual student which are related to the student's school problem(s).

2114 Student Accounting Services. Activities of maintaining a database of records related to school attendance, family, and other census data. Data is used by teachers and guidance staff.

2115 Student Safety. Activities associated with campus monitors, school police, crossing guards, and other direct expenses associated with services intended to enhance student, campus, and vicinity safety. Expenses associated with the security of buildings, grounds, and equipment should continue to be accounted for in the 2546 function code.

2117 Identification and Recruitment of Migrant Children. Including the Migrant Student Record Transfer System.

2119 Other Attendance and Social Work Services. Attendance and social work services other than those described above.

**2120 Guidance Services.** Those activities of counseling students and parents providing consultation with other staff members on learning problems, assisting students in personal and social development, assessing the abilities of students, assisting students as they make their own educational and career plans as well as choices, providing referral assistance, and working with other staff members in planning and conducting guidance programs for students. Use this function for school to work services, e.g., job placement, referral, career counseling.

2121 Service Area Direction. Activities associated with directing and managing guidance services.

2122 Counseling Services. Activities centered upon all student relationships for the purpose of assisting students: to understand their educational, personal, and occupational strengths and limitations; to relate their abilities and aptitudes to educational and career opportunities; to utilize their abilities in formulating realistic plans; and to achieve satisfying personal and social development.

2123 Appraisal Services. Activities which assess student characteristics to be used in administration, instruction, and guidance to assist the student in assessing his/her purposes and progress in personality and career development.

2124 Information Services. Activities for disseminating educational, occupational, and personal social information to help acquaint students with the curriculum, educational and vocational opportunities, and requirements. Such information might be provided directly to students through activities, such as group or individual guidance, or it might be provided indirectly to students, through staff members or parents.

2126 Placement Services. Activities organized to: (1) help place students in appropriate educational situations and/or in appropriate part-time employment while they are in school, and in appropriate educational and occupational situations after they leave school; and (2) help students make the transition from one educational or occupational experience to another. This may include admissions counseling, referral services, assistance with records, and follow-up communications with employers.

2129 Other Guidance Services. Other guidance services which cannot be classified above.

**2130 Health Services.** Physical and mental health services which are not direct instruction. Included are activities that provide students with appropriate medical, dental, and nursing services.

2131 Service Area Direction. Activities associated with directing and managing health services.

2132 Medical Services. Activities concerned with the physical and mental health of students, such as health appraisal, including: screening for vision, communicable diseases, and hearing deficiencies; screening for psychiatric services; periodic health examinations; emergency injury and illness care; and communications with parents and medical officials. Premiums for student health insurance are recorded here.

2133 Dental Services. Those activities associated with dental screening, dental care, and orthodontic activities.

2134 Nurse Services. Those nursing activities which are not instruction, such as health inspection, treatment of minor injuries, and referrals for other health services.

2139 Other Health Services. Other health services not classified above.

**2140 Psychological Services.** Activities concerned with administering psychological tests and interpreting the results; gathering and interpreting information about student behavior; working with other staff members in planning school programs to meet the special needs of students as indicated by psychological tests; behavioral evaluation and planning; and managing a program of psychological services, including psychological counseling for students, staff and parents as well as student evaluations.

2141 Service Area Direction. Activities associated with directing and managing psychological services.

2142 Psychological Testing Services. Activities concerned with administering psychological tests; standardized tests; and inventory assessment of ability, aptitude, achievement, interests, and personality, and the interpretation of these measures for students, school personnel, and parents.

2143 Psychological Counseling Services. Activities which take place between a school psychologist or counselor and students and their parents in which the students are helped to receive, clarify, solve, and resolve problems of adjustment and interpersonal relationships.

2144 Psychotherapy Services. Activities which provide a therapeutic relationship between a qualified mental health professional and one or more students in which the students are helped to perceive, clarify, solve, and resolve emotional problems or disorders.

2148 Other Psychological Services. Other activities associated with psychological services not classified above.

**2150 Speech Pathology and Audiology Services.** Activities which have as their purpose the identification, assessment, and treatment of students with impairments in speech, hearing, and language.

2151 Service Area Direction. Activities associated with directing and managing speech pathology and audiology services.

2152 Speech Pathology Services. Activities organized for the identification of students with speech and language disorders: diagnosis and appraisal of specific speech and language disorders; referral for medical or other professional attention necessary to the habilitation of speech and language disorders; provision of required speech habilitation services; and counseling/guidance of students with speech and language disorders, their parents, and teachers, as appropriate.

2153 Audiology Services. Activities organized for the identification of students with hearing loss; determination of the range, nature, and degree of hearing function; referral for medical or other professional attention as appropriate to the habilitation of hearing; language habilitation; auditory training, speech reading (lip-reading), and speech conservation, as necessary; creation and administration of programs of hearing conservation; and counseling/guidance of students with hearing loss, their parents, and teachers, as appropriate.

2159 Other Speech Pathology and Audiology Services. Other activities associated with speech pathology and audiology services not classified above.

**2160 Other Student Treatment Services.** Activities associated with providing services, such as occupational therapy, physical therapy, adaptive physical education, etc.

**2190** **Service Direction, Student Support Services.** Activities concerned with direction and management of student support services e.g., special education, ELL, and at-risk programs. Expenditures for the Special Education Director for the district should be recorded here.

2200 Support Services—Instructional Staff. Activities associated with assisting the instructional staff with the content and process of providing learning experiences for students.

**2210** **Improvement of Instruction Services.** Activities designed primarily for assisting instructional staff in planning, developing, and evaluating the process of providing learning experiences for students.

2211 Service Area Direction. Activities associated with directing and managing the improvement of instruction services. The District's Director of Instruction should be charged here.

2213 Curriculum Development. Activities designed to aid teachers in developing, preparing, and utilizing curriculum materials.

2219 Other Improvement of Instruction Services. Activities for improving instruction other than those classified above.

**2220** **Educational Media Services.** Activities concerned with the use of all teaching and learning resources, including hardware, software, print and non-print content materials, online, and other distance learning resources. Educational media are defined as any device, content material, method, or experience used for teaching and learning purposes. Use 2220 for computer repair if related to instruction and for learning resources that support professional technical education.

2221 Service Area Direction. Activities concerned with directing and managing educational media services.

2222 Library/Media Center. Activities, such as selecting, acquiring, preparing, cataloging, and circulating print and non-print materials as well as networking with other entities to offer a wide array of these materials to students and staff. Also included are services to instructional staff related to the use of the media center materials and instruction of students in the use of media center materials and equipment.

2223 Multimedia Services. Activities, such as selecting, preparing, maintaining, and circulating to instructional and administrative staff all multimedia equipment and materials.

2224 Educational Television Services. Activities concerned with planning, programming, writing, presenting, and receiving educational programs or segments of programs via closed circuit or broadcast television.

2229 Other Educational Media Services. Educational media services other than those classified above.

**2230** **Assessment and Testing.** Activities to measure individual student achievement. Information obtained is generally used to monitor individual and group progress in reaching district and state learning goals and requirements.

**2240** **Instructional Staff Development.** Activities specifically designed for instructional staff (including instructional assistants) to assist in preparing and utilizing special/new curriculum materials, understanding and utilizing best teaching practices, and any other activity designed to improve teacher performance. All staff development costs for non-instructional staff should be charged to their function. Use this function for staff development that is instructionally related.

2300 Support Services—General Administration. Activities concerned with establishing and administering policy in connection with operating the district.

**2310** **Board of Education Services.** Activities of the legally elected or appointed body vested with responsibilities for educational planning and policy making. Use this function to record legal services.

**2320 Executive Administration Services.** Activities associated with the overall general administrative or executive responsibility for the entire district.

2321 Office of the Superintendent Services. Activities performed by the superintendent and such assistants as deputy, associate, and assistant superintendents, in the general direction and management of all affairs of the district. This function area includes all personnel and materials in the office of the chief executive officer.

Activities of the deputy, associate and/or assistant superintendents should be recorded here.

2324 State and Federal Relations Services. Activities concerned with developing and maintaining good relationships with state and federal officials.

2329 Other Executive Administration Services. Other general administrative services which cannot be recorded under the preceding functions.

2400 School Administration. Activities concerned with area wide supervisory responsibility. This function could include directors of districtwide instructional programs that have administrative responsibilities.

**2410 Office of the Principal Services.** Activities concerned with directing and managing the operation of a particular school or schools. Included are the activities performed by the principal, assistant principals, and other assistants in general supervision of all operations of the school: evaluation of the staff members of the school, assignment of duties to staff members, supervision and maintenance of the school records, and coordination of school instructional activities with instructional activities of the district. Expenditures for activities related to the coordination of student activities shall also be classified under this account. Clerical staff for these activities are included.

**2490 Other Support Services—School Administration.** Other school administration services which cannot be recorded under the preceding functions.

2500 Support Services—Business. Activities concerned with purchasing, paying, transporting, exchanging, and maintaining goods and services for the district. Included are the fiscal, operation and maintenance, and internal services for operating all schools.

**2510 Direction of Business Support Services.** Activities concerned with directing and managing the business support services as a group.

**2520 Fiscal Services.** Activities concerned with the fiscal operations of the district. This program area includes budgeting, receiving and disbursing, financial accounting, payroll, inventory control, and internal auditing.

2521 Service Area Direction. Activities of directing and managing fiscal services which includes the activities of the assistant superintendent, director, or business manager in directing and managing fiscal activities including debt management.

2522 Budgeting Services. Activities concerned with supervising budget planning, formulation, control, and analysis.

2523 Receiving and Disbursing Funds Services. Activities concerned with properly receiving and paying money for the district.

2524 Payroll Services. Activities concerned with paying periodic salaries and wages to employees for services rendered; paying related payroll taxes, assessments, and withholdings; and filing all required reports.

2525 Financial Accounting Services. Activities concerned with maintaining records of the financial operations and transactions of the district which include activities, such as accounting as well as interpreting financial transactions and account records.

2526 Internal Auditing Services. Activities concerned with verifying the account records which include evaluating the adequacy of the internal control system, verifying and safeguarding assets, reviewing the reliability of the accounting and reporting systems, and ascertaining compliance with established policies and procedures.

2527 Property Accounting Services. Activities concerned with preparing and maintaining current inventory records of land, buildings, and movable equipment. These records are to be used in equipment control and facilities planning.

2528 Risk Management Services. Activities involving the systematic identification and evaluation of exposure to loss within the district and selection of the most appropriate method for managing those exposures. Includes activities, such as insurance program administration and loss prevention.

2529 Other Fiscal Services. Fiscal services which cannot be classified under the preceding functions. Including unemployment.

**2540 Operation and Maintenance of Plant Services.** Activities concerned with keeping the physical plant open, comfortable, and safe for use; and keeping the grounds, buildings, and equipment in an effective working condition and state of repair. Activities which maintain safety in buildings, equipment, and grounds are included.

2541 Service Area Direction. Activities of directing and managing the operation and maintenance of the school plant facilities.

2542 Care and Upkeep of Buildings Services. Activities concerned with keeping a physical plant clean and ready for daily use. Included are: operating the heating, lighting, and ventilating systems; and rental and lease of buildings.

2543 Care and Upkeep of Grounds Services. Activities concerned with maintaining land and its improvements (other than buildings) in good condition.

2544 Maintenance. Expenditures for activities concerned with maintenance of the total district's physical plant, including repair and replacement of facilities and equipment.

2546 Security Services. Activities concerned with maintaining security and safety of school property.

2549 Other Operation and Maintenance of Plant Services. Operation and maintenance of plant activities which cannot be classified under the preceding functions.

**2550 Student Transportation Services.** Activities concerned with the transportation of students between home and school, as provided by state law, including trips to school activities. Area code 320 Special Education must be used with 2550 functions to designate special education costs. Charge insurance costs related to transportation to this function, including property and liability. Costs related to 2560 Alternative Transportation should not be coded here.

2551 Service Area Direction. Activities pertaining to directing and managing student transportation services.

2552 Vehicle Operation Services. Activities concerned with operating vehicles for student transportation. Driving of buses or other student transportation vehicles and liability insurance on student transportation vehicles is included.

2558 Special Education Transportation Services. Activities concerned with providing transportation to special education students. Driving buses, providing attendant services, fuel, supplies, and equipment on dedicated special education routes are included here. Insurance costs should be allocated between regular and special education transportation. Use area code 320 Special Education for maintenance of effort purposes. Optional—for district use.

2559 Other Student Transportation Services. Student transportation services which cannot be classified under the preceding functions.

**2560 Alternative Transportation (2023 HB 3014).** Activities concerned with alternative transportation costs, including active transportation (walking, bicycling, and other human-powered means) for students who reside within three miles of their school and/or public transportation. These expenses may be reimbursable per House Bill 3014 from the 2023 legislative session only if they are approved in a waiver and/or supplemental plan by the State Board of Education. Supplemental plans and waivers must be reauthorized every two years.

**2570 Internal Services.** Activities concerned with buying, storing, and distributing supplies, furniture, and equipment; and those activities concerned with duplicating and printing for the district.

2571 Service Area Direction. Activities of directing and managing internal services.

2572 Purchasing Services. Activities of purchasing supplies, furniture, equipment, and materials, used in school or district operation.

2573 Warehousing and Distributing Services. The operation of the system wide activities of receiving, storing, and distributing: supplies, furniture, equipment, materials, and mail. This program includes the pickup and transporting of cash from school facilities to the central administrative office or bank, for control and/or deposit in addition to other courier services.

2574 Printing, Publishing, and Duplicating Services. Activities of printing and publishing administrative publications, such as annual reports, school directories, and manuals. Providing centralized services for duplicating school materials and instruments, such as school bulletins, newsletters, and notices are also included.

2579 Other Internal Services. Other internal services which cannot be classified under the preceding functions.

2600 Support Services—Central Activities. Other than general administration, which supports each of the other instructional and supporting services programs. These activities include planning, research, development, evaluation, information, staff, statistical, and data processing services.

**2610 Direction of Central Support Services.** Activities concerned with directing and managing the central support services as a group.

**2620 Planning, Research, Development, Evaluation Services, Grant Writing, and Statistical Services.** Activities, on a system wide basis, associated with conducting and managing programs of planning, research, development, evaluation, and grant writing for a district.

2621 Service Area Direction. Activities associated with directing and managing the planning, research, development, and evaluation service area.

2622 Development Services. Activities concerned with the evolving process of utilizing the products of research and considered judgment for the deliberate improvement of educational programs.

2623 Evaluation Services. Activities concerned with ascertaining or judging the value of an action or an outcome of an action by careful appraisal of previously specified data in light of the particular situation and the goals and objectives previously established.

2624 Planning Services. Activities concerned with the selection or identification of the overall long-range goals, priorities, and objectives of an organization or program; and the formulation of various courses of action in terms of identification of needs; and the relative costs and benefits for the purpose of deciding which courses of action are to be followed in striving to achieve those goals, priorities, and objectives.

2625 Research Services. Activities concerned with the systematic study and investigation of the various aspects of education undertaken to establish facts and principles.

2626 Grant Writing. Activities concerned with seeking, writing, and submitting grants for the district.

2627 Statistical Services. Activities concerned with relating and describing statistical information.

2628 Fundraising/Resource Development. Costs specifically incurred related to activities for raising new resources not related to specific student activities. Fundraising activity cost by student groups should be coded to their co-curricular function.

2629 Other Planning, Research, Development, and Evaluation Services. Other services of this nature not described above.

**2630 Information Services.** Activities concerned with writing, editing, and other preparation necessary to disseminate educational and administrative information to pupils, staff, managers, or to the general public through direct mailing, the various news media, or personal contact.

2631 Service Area Direction. Activities of directing and managing information services.

2632 Internal Information Services. Activities concerned with writing, editing, and providing administrative information to students and staff.

2633 Public Information Services. Activities concerned with writing, editing, and other preparation necessary to disseminate educational and administrative information to the public through various news media or personal contact.

2634 Management Information Services. Activities concerned with writing, editing, and other preparation necessary to disseminate to management information about the operation of the district; and about the community, state, and nation, in order to make logical decisions.

2639 Other Information Services. Activities concerned with information services not classified above.

**2640 Staff Services.** Activities concerned with maintaining an efficient staff for the district including such activities as recruiting and placement, staff transfers, health services, and staff accounting. Record costs of fingerprinting employees under this function.

2641 Service Area Direction. Activities of directing and managing staff services.

2642 Recruitment and Placement Services. Activities concerned with employment and assigning personnel for the district.

2643 Staff Accounting Services. Services rendered in connection with the systematic recording and summarizing of information relating to staff members employed by the district.

2645 Health Services. Activities concerned with medical, dental, and nursing services provided for district employees. Included are physical examinations, referrals, and emergency care.

2649 Other Staff Services. Staff services which cannot be classified under the preceding functions.

**2660 Technology Services.** Activities concerned with all aspects of technology, which include computing and data processing services, such as networking and telecommunications costs, such as telephones. Use for major administrative technology expenditures as well as repair of administrative technology, central networking.

2661 Service Area Direction. Activities concerned with directing and managing technology services.

2662 Systems Analysis Services. Activities concerned with the search for and an evaluation of alternatives which are relevant to defined objectives, based on judgment and, wherever possible, on quantitative methods. Where applicable, these activities pertain to the development of technological procedures or application to electronic technology equipment.

2663 Programming Services. Activities concerned with the preparation of a logical sequence of operations to be performed either manually or electronically, in solving problems or processing data, as well as the preparation of coded instructions and data for such sequences.

2664 Operations Services. Activities concerned with scheduling, maintaining, and producing data. These activities include operating business machines and data processing machines.

2669 Other Technology Services. Activities concerned with technology which are not described above. Including telephone, T1 lines, and fractional leased lines.

**2670 Records Management Services.** Activities concerned with retention and disposal of district records.

**2680 Interpretation and Translation Services.** Use for language and interpretation services not related to the acquisition of the English language. (For additional guidance, see Appendix E Guidelines for ELL and Non-ELL Related Expenditures.)

**2690 Other Support Services — Central.** Central Services not classified above.

**2700 Supplemental Retirement Program.** Costs associated with a supplemental retirement program provided to both current and prior employees by the district.

## 3000 ENTERPRISE AND COMMUNITY SERVICES.

Activities concerned with operations that are financed and operated in a manner similar to private business enterprises, where the stated intent is that the costs of providing goods and services to the students or general public are financed or recovered primarily through user charges and community programs.

**3100 Food Services.** Activities concerned with providing food to students and staff in a school or district. This service area includes the preparation and serving of regular and incidental meals, lunches, or snacks in connection with school activities, and the delivery of food.

3110 Service Area Direction. Activities of directing and managing food services.

3120 Food Preparation and Dispensing Services. Activities concerned with preparing and serving regular and incidental meals, lunches, or snacks to students and staff in a school or district which include: operating kitchen equipment, preparing food, cooking, serving food, cleaning dishes, storing dishes, and kitchen equipment.

3130 Food Delivery Services. Activities concerned with delivering food to the school or district.

3190 Other Food Services. Food services activities which cannot be classified under the preceding functions.

**3200 Other Enterprise Services.** Activities concerned with other Enterprise Services

**3300 Community Services.** Activities which are not directly related to the provision of education for pupils in a district. These include services, such as community recreation programs, civic activities, public libraries, programs of custody and care of children, and community welfare activities provided by the district for the community as a whole or in part. Additionally, this function is used to record college scholarship payments. Also use for non-instructional expenses related to historically underserved students.

3310 Direction of Community Services Activities. Activities concerned with directing and managing community services activities.

3320 Community Recreation Services. Activities concerned with providing recreation for the community as a whole, or for some segment of the community. Included are such staff activities as organizing and supervising: playgrounds, swimming pools, and other recreation programs, for the community.

3330 Civic Services. Activities concerned with providing services to civic affairs or organizations. This program area includes services to: parent-teacher association meetings, public forums, lectures, and civil defense planning.

3340 Public Library Services. Activities pertaining to the operating of public libraries by a district, or the provision of library services to the general public through the school library. Included are such activities as budgeting and planning the library's collection in relation to the community and informing the community of public library resources and services.

3360 Welfare Activities Services. Activities pertaining to the provision of personal needs of individuals who have been designated as needy by an appropriate governmental entity. These needs include stipends for school attendance, salaries paid to pupils for work performed whether for the district or for an outside concern, and for clothing, food or other personal needs.

3370 Nonpublic School Students Services. Services to students attending a school established by an agency other than the state, subdivision of the state, or the federal government, which usually is supported primarily by other than public funds. The services consist of such activities as those involved in providing instructional services, attendance and social work services, health services, and transportation services for nonpublic school students. Statutory requirements in individual states may require construction of sub-functions for these and other functions and sub- functions related to expenditures for nonpublic school students. Special accounting provisions may be required for the transfer of these expenditures from corresponding functional accounts for services provided to public school students.

3390 Other Community Services. Services provided the community which cannot be classified above. College scholarship expenditures are recorded here.

**3500 Custody and Care of Children Services.** Activities pertaining to the provisions of programs for the custodial care of children in residential day schools, or childcare centers which are not part of, or directly related to, the instructional program, and where the attendance of the children is not included in the attendance figures for the district.

## 4000 FACILITIES ACQUISITION AND CONSTRUCTION.

Activities concerned with the acquisition of land and buildings, major remodeling and construction of buildings and major additions to buildings, initial installation or extension of service systems and other built-in equipment, and major improvements to sites. Major capital expenditures, which are defined as capital expenditures that are eligible for general obligation bonding, are recorded here. Maintenance and upkeep of buildings are charged to 2540 Operation and Maintenance of Plant Services.

**4110 Service Area Direction.** Activities pertaining to directing and managing facilities acquisition and construction services.

**4120 Site Acquisition and Development Services.** Activities pertaining to the initial acquisition of sites and improvements thereon.

**4150 Building Acquisition, Construction, and Improvement Services.** Activities concerned with building acquisition through purchase or construction and building improvements. Initial installation or extension of service systems, other built-in equipment and building additions are included.

**4180 Other Capital Items.** Activities concerned with major capital expenditures that are eligible for general obligation bonding, such as textbooks and technology.

**4190** **Other Facilities Construction Services.** Facilities construction activities which cannot be classified above.

## 5000 OTHER USES.

Activities included in this category are servicing the debt of a district, conduit-type transfers from one fund to another fund and apportionment of funds by ESD.

**Note: Debt Service (5100) must be appropriated separately, and Transfers of Funds (5200) must be appropriated separately to comply with local budget law under ORS 294.456.**

**5100** **Debt Service.** The servicing of the debt of a district. Categories of debt service are listed under objects.

5110 Long-Term Debt Service. Expenditures for debt retirement exceeding twelve months.

5120 Short-Term Debt Retirement. Expenditures for debt retirement paid in full within the fiscal year.

**5200** **Transfers of Funds.** These are transactions which withdraw money from one fund and place it in another without recourse. Unless state law prohibits, revenues should be allocated between funds when received and recorded in the funds to which they belong, rather than placing them in the 100 General Fund and later transferring them. (These are not counted in local district totals of expenditures.) Interfund loans are not recorded here but are handled through the balance sheet accounts.

**5300** **Apportionment of Funds by ESD or LEA.** Apportionment of equalization funds and distribution of other funds by the educational service districts (flow-through dollars from ESDs to districts or other ESDs) or from an LEA acting as the fiscal agent for a grant distributed to other districts or other agencies.

**5400** **PERS UAL Bond Lump Sum Payment to PERS.** The one-time lump sum payment made to PERS following the issuance of a PERS unfunded accrued liability (UAL) Bond.

## 6000 CONTINGENCIES (FOR BUDGET ONLY).

Expenditures which cannot be foreseen and planned in the budget process because of an occurrence of an unusual or extraordinary event. Use with object 810 Planned Reserve only.

6110 Operating Contingency. Budgeted amount to be transferred by school board resolution to the proper expenditure code.

## 7000 UNAPPROPRIATED ENDING FUND BALANCE.

An estimate of funds needed to maintain operations of the school district from July 1 of the ensuing fiscal year and the time when sufficient new revenues become available to meet cash flow needs of the fund. No expenditure shall be made from the unappropriated ending fund balance in the year in which it is budgeted. Use with object 820 Reserved for Next Year only.

# Expenditure Objects

Object means the service or commodity obtained as the result of a specific expenditure. Seven major object categories are identified and described in this handbook: 100 Salaries, 200 Associated Payroll Costs, 300 Purchased Services, 400 Supplies and Materials, 500 Capital Outlay, 600 Other Objects, and 700 Transfers. These broad categories are subdivided to obtain more detailed information about objects of expenditures. The use of a three-digit code number when used makes it possible to search out detailed information. Following are definitions of the major categories and subcategories. Where the term "district" is used it means school district or educational service district.

## 100 SALARIES.

Amounts paid to employees of the district who are considered to be in positions of a permanent nature or hired temporarily, including personnel substituting for those in permanent positions. This includes gross salary for personal services rendered while on the payroll of the district.

110 Regular Salaries. Full-time, part-time, and prorated portions of the costs for work performed by employees of the district who are considered to be in positions of a permanent nature.

- **111 Licensed Salaries.** Costs for work performed by regular licensed employees of the district. Include licensed coordinators and licensed employees in bargaining unit under this object.
- **112 Classified Salaries.** Costs for work performed by regular classified employees of the district. Confidential staff may be coded to this object or 114 Managerial — Classified below or you may use a district defined code to track separately.
- **113 Administrators.** Costs for work performed by regular administrative employees who manage, direct, or administer programs of the district. Administrators need not be licensed to be charged to 113.
- **114 Managerial — Classified.** Costs for work performed by employees who supervise or manage programs of the district. Supervisors of non-licensed staff, e.g. food services, transportation are recorded under this object. Supervisors are usually not regular classified employees.
- **115 Sabbatical.** Amounts paid by the district to employees on sabbatical leave.
- **116 Supplemental Retirement Stipends.** Costs for retired employees of the district who receive supplementary retirement payments from the district.
- **117 Unused Leave.** Unused leave payments when an employee retires or terminates employment are allowable in the year of payment provided, they are allocated as a general administrative expense to all activities of the governmental unit or component. The unused leave is specific to the executive level staff (Superintendent, Deputies or direct reports to the Deputy Superintendent) on an organization chart.

120 Nonpermanent Salaries. Full-time, part-time, and prorated portions of the costs for work performed by employees of the district who are hired on a temporary or substitute basis to perform work in positions in either temporary or permanent nature.

- **121 Substitutes—Licensed.** Costs for work performed by substitute licensed employees of the district.
- **122 Substitute—Classified.** Costs for the work performed by substitute classified employees of the district.
- **123 Temporary—Licensed.** Salaries of temporary employees—full-time, part-time, and prorated portions of the costs for work performed by employees of the district who are hired on a temporary basis.
- **124 Temporary—Classified.** Costs for work performed by temporary classified employees.

**130** **Additional Salary.** Money paid to employees of the district in positions of either a temporary or permanent nature for work performed in addition to the normal work period for which the employee is compensated under 110 Regular Salaries and 120 Nonpermanent Salaries above. The terms of such payment for overtime is a matter of state and local regulation or negotiated agreement. Includes additional pay for classified employee overtime and for activities, such as coaching, supervision of extracurricular activities, extended contracts, etc. object 130 should be used for all overtime.

140-190 Additional Salary. District defined. Must be reported to the State as object 130.

## 200 ASSOCIATED PAYROLL COSTS.

Amounts paid by the district on behalf of employees; these amounts are not included in the gross salary but are over and above. Such payments are fringe benefit payments, while not paid directly to employees, nevertheless are part of the cost of salaries and benefits. Examples are: (1) group health or life insurance, (2) contributions to public employees' retirement system, (3) social security, (4) workers' compensation, and (5) unemployment insurance.

**210** **Public Employees Retirement System.** District payments to the Public Employees Retirement System (PERS).

- 211 Employer Contribution. Employer's contribution to the Public Employees Retirement System (PERS), Tier I and Tier II.
- 212 Employee Contribution, Pick-Up. Employee portion, paid by employer to the Public Employees Retirement System (PERS).
- 213 PERS UAL Contribution. Employers Public Employees Retirement System (PERS) debt service costs related to the PERS Unfunded Actuarial Liability (UAL).
- 214 PERS UAL Contribution. Employers Public Employees Retirement System (PERS) debt service costs related to the PERS Unfunded Actuarial Liability (UAL).
- 215 PERS UAL Contribution. Employers Public Employees Retirement System (PERS) debt service costs related to the PERS Unfunded Actuarial Liability (UAL).
- 216 Employer Contribution. Employer's contribution to the Oregon Public Services Retirement Plan, OPSRP or Tier III.

**220** **Social Security Administration.** Employer's contribution to the Social Security/ Medicare, Federal Insurance Contributions Act (FICA) for employee retirement.

**230** **Other Required Payroll Costs.**

- 231 Workers' Compensation. Amounts paid by the districts to provide workers' compensation insurance for its employees.
- 232 Unemployment Compensation. Amounts paid by the district to provide unemployment compensation for its employees.

**240** **Contractual Employee Benefits.** Amounts paid by the district which are a result of a negotiated agreement between the Board of Directors and the employee groups. Examples of expenditures would be health insurance, long-term disability and tuition reimbursement. The district may assign account codes 241 through 249 for these expenditures. Include here payments/penalties in lieu of health insurance and penalties paid due to the choice not to offer benefits to employees (Affordable Care Act).

**270** **Post Retirement Health Benefits (PRHB).** Post-Retirement Health Benefits are costs of health insurance or health services not included in a pension plan for retirees and their spouses, dependents, and survivors.

## 300 PURCHASED SERVICES.

Services which, by their nature, can be performed only by persons or firms with specialized skills and knowledge. While a product may or may not result from the transaction, the primary reason for the purchase is the service provided. Included are the services of architects, engineers, auditors, dentists, medical doctors, lawyers, consultants, teachers, accountants, etc.

**310** **Instructional, Professional and Technical Services.** Services which by their nature can be performed only by persons with specialized skills and knowledge. Included are the services of medical doctors, lawyers, consultants, teachers for the instructional area.

- 311 Instruction Services. Non-payroll services performed by qualified persons directly engaged in providing learning experiences for pupils. Included are the services of teachers, teaching assistants, teacher aides, and "performance contract" activities. Use this code if the resident district is providing instructional services to the student and the resident district is paying for the student to receive additional services i.e. expanded options. Online curriculums would be coded here.
- 312 Instructional Programs Improvement Services. Services performed by persons qualified to assist teachers and supervisors in enhancing the quality of the teaching process. This category includes curriculum consultants, in-service training specialists, etc., not on the payroll.
- 313 Student Services. Non-payroll services of qualified personnel to assist students and their parents in solving mental and physical problems to supplement the teaching process.
- 316 Data Processing Services.
- 317 Statistical Services.
- 318 Professional and Improvement Costs for Non-Instructional Staff (e.g. workshops, etc.). Use object 342 Travel, Out of District for non-instructional staff travel, conferences, etc.
- 319 Other Instructional, Professional and Technical Services. Services which are professional and technical in nature have not been classified above. Including sign language interpreters, language interpreters, and translation services for student instruction. (See Appendix E Guidelines for ELL and Non-ELL Related Expenditures for additional guidance.)

**320** **Property Services.** Services purchased to operate, repair, maintain, insure, and rent property owned and/or used by the district. These services are performed by persons other than district employees.

- 321 Cleaning Services. Services purchased to clean buildings or equipment other than those provided by district employees.
- 322 Repairs and Maintenance Services. Expenditures for repairs and maintenance services not provided directly by district personnel. This includes contracts and agreements covering the upkeep of grounds, buildings, and equipment. Technical repair services, e.g. copier repair, should be charged here.
- 324 Rentals. Expenditures for leasing or renting costs incurred by the district. This includes bus and other vehicle rental when operated by district personnel and lease of data processing equipment. Costs for single agreements covering equipment as well as operators are not included here but are considered elsewhere under 300 Purchased Services (see 330 Student Transportation Services and 355 Printing and Binding).
- 325 Electricity. Expenditures for electrical energy.
- 326 Fuel. Expenditures for fuel used for heating and/or cooling.
- 327 Water and Sewage. Expenditures for water and sewage services.
- 328 Garbage. Expenditures for garbage service.
- 329 Other Property Services. Property Services purchased which are not classified above.

**330** **Student Transportation Services.** Expenditures to persons (not on the district payroll) or agencies for the purpose of transporting children. These include those expenditures to individuals who transport themselves or to parents who transport their own children. Expenditures for the rental of buses which are operated by personnel on the district payroll are not recorded here; they are recorded under 300 Purchased Services— 324 Rentals.

- 331 State School Fund Reimbursable Student Transportation. Contract payments for transporting students from home to school and return, as well as instructional field trips.
- 332 State School Fund Non-Reimbursable Student Transportation. Contract payments for transporting students on student body trips, interscholastic athletic events, out of state field trips, or non-instructional field trips (e.g., skating parties).
- 333 Board and Room in Lieu of Transportation. Payments, such as board and room made to parents or guardians to maintain children near school. Expenditures for rental of shelters for children and for maintenance of district owned shelters.
- 334 Transportation Portion of Tuition Payments. Conduit-type payments for transportation expenses.

**340** **Travel.** Costs for transportation for all district personnel (including students), conference registration, meals, hotel, and other expenses associated with traveling on business for the district. Payments for per diem in lieu of meals and lodging as well as for car allowance also are charged here. Travel costs may be identified through use of the following sub-accounts at the option of the district. Use for travel costs incurred by district employees and students. Travel costs incurred by contracted professionals should be included in the cost of the service. Vehicles rented in lieu of reimbursing mileage to an employee should be charged to 340.

- 341 Travel, Local in District. Expenditures for district personnel between facilities and within the boundaries of the school district.
- 342 Travel, Out of District. Travel expenditures for district personnel to points outside the boundaries of the school district. Non-instructional staff travel is included here.
- 343 Travel, Student, Out of District. Travel expenditures for students to points outside the boundaries of the school district.
- 349 Other Travel. Travel expenditures which cannot be classified above.

**350** **Communication.** Services provided by persons or businesses to assist in transmitting and receiving data or information. This category includes telephone and international data communications, postage machine rental, postage, fax, and advertising. Expenditures for these services may be identified through the use of sub-accounts at the option of the district.

- 351 Telephone. Expenditures for telephone services, faxes, pagers, and toll charges.
- 353 Postage. Expenditures for postage stamps and postage machine rentals.
- 354 Advertising. Expenditures for printed announcements, legal notices in professional periodicals and newspapers, or announcements broadcast by radio and television networks. These expenditures include advertising for such purposes as personnel recruitment, bond sales, used equipment sales, and other objects. Costs for professional fees for advertising or public relation services are not recorded here but are charged to 380 Non-instructional Professional and Technical Services.
- 355 Printing and Binding. Expenditures for job printing and binding usually according to specifications of the district. This includes the design and printing of forms and posters, as well as printing and binding, of district publications. Preprinted standard forms are not charged here but are recorded under object 400 Supplies and Materials.
- 359 Other Communication Services. Including T1 lines.

**360** **Charter School Payments.** Expenditures to reimburse Charter Schools for services rendered to students.

370 Tuition. Expenditures to reimburse other educational agencies for services rendered to students. Use object 37X, if your district is paying another entity to provide the student's entire instructional program.

**371 Tuition Payments to Other Districts Within the State.** Conduit-type payments to districts, generally for tuition in the state for services rendered to students residing in the paying district. Where a governmental unit collects money from a non-operating district for the education of students from the non-operating district and pays it to an operating district, the non-operating district records such payments here.

**372 Tuition Payments to Other Districts Outside the State.** Conduit-type payments to districts, generally for tuition outside the state for services rendered to students residing in the paying district. Where a governmental unit collects money from a non-operating district for the education of students from the non-operating district and pays it to an operating district, the non-operating district records such payments here.

**373 Tuition Payments to Private Schools.** Conduit-type payments to private schools, generally for tuition for students residing in the paying district.

**374 Other Tuition.** Tuition payments which cannot be classified above. Record post-graduation scholarship payments here.

**380 Non-instructional Professional and Technical Services.** Services which by their nature can be performed only by persons with specialized skills and knowledge. Included are the services of architects, engineers, auditors, dentists, medical doctors, lawyers, consultants, accountants, etc.

381 Audit Services. Expenditures to an audit firm for completion of the annual audit of the district's financial records. Also included would be costs for other reports and consultations provided by the audit firm. Use with function 2310 Board of Education Services.

382 Legal Services. Expenditures for consultations with the district's attorney and associated legal costs. Use with function 2310 Board of Education Services. May be used with function 4150 Building Acquisition, Construction, and Improvement Services when associated with a capital project.

383 Architect/Engineer Services. Expenditures for professional services of licensed professionals for consultation, regarding the district's facilities.

384 Negotiation Services. Expenditures for services performed in negotiating or conferring with any labor group.

385 Management Services. Services performed by persons qualified to assist management either in the broad policy area or in the general operation of the district. This category includes consultants, individually or as a team, to assist the chief executive in conferences or through systematic studies.

386 Data Processing Services. Services performed by persons, organizations, or other agencies qualified to process data. This category includes those data processing services purchased from another agency or concern or specialists who are contracted to perform a specific task on a short time basis.

387 Statistical Services. Non-payroll services performed by persons or an organization qualified to assist in handling statistics. This category includes special services for analysis, tabulations, or similar work.

388 Election Services. Expenditures for the costs incurred by the county clerk in conducting elections for the school district. Use with function 2310 Board of Education Services.

389 Other Non-Instructional Professional and Technical Services. Other professional services not classified above. Including sign language interpretation, language interpretation, and translation services when working with parents. (See Appendix E Guidelines for ELL and Non-ELL Related Expenditures for additional guidance.)

**390 Other General Professional and Technological Services.**

## 400 SUPPLIES AND MATERIALS.

Amounts paid for material items of an expendable nature that are consumed, worn out, or deteriorated by use; or items that lose their identity through fabrication or incorporation into different or more complex units or substances.

**410** **Consumable Supplies and Materials.** Expenditures for all supplies for the operation of a district, including freight and cartage. If such supplies are handled for resale to students, only the net cost of supplies is recorded here.

NOTE: Accounts 411 through 419 are available for further identifying supplies for management purposes at the option of the district.

**420** **Textbooks.** Expenditures for prescribed books which are purchased for students or groups of students, and resold or furnished free to them. This category includes the costs of workbooks, textbook binding or repairs, as well as the net amount of textbooks which are purchased to be resold or rented. E-textbooks are considered curriculum and would be coded here.

**430** **Library Books.** Expenditures for regular or incidental purchases of library books available for general use by students, including any reference books, even though such reference books may be used solely in the classroom. Also recorded here are costs of binding or other repairs to school library books and e-library books.

**440** **Periodicals.** Expenditures for periodicals and newspapers. A periodical is any publication appearing at regular intervals of less than a year and continuing for an indefinite period.

**450** **Food.** Expenditures for food purchases related to 3100 Food Service only. Other food purchases should remain in object 410 Consumable Supplies and Materials.

**460** **Non-Consumable Items.** Expenditures for equipment with a current value of less than $5,000 or for items which are "equipment-like," but which fail one or more of the tests for classification as object 541 Initial and Additional Equipment Purchase or 542 Replacement Equipment Purchase (see object 540 Depreciable Equipment definition). Examples might include handheld calculators, stacking chairs, etc. This object category could be used when a district desired to treat these items as equipment for budgeting, physical control, etc., without either violating the state dollar threshold for capital equipment or combining these items with object 410-419 Consumable Supplies and Materials.

**470** **Computer Software.** Expenditures for published computer software. Include licensure and usage fees for software here. The Cloud is considered software and would be coded here.

**480** **Computer Hardware.** Expenditures for non-capital computer hardware, generally of value not meeting the capital expenditure criterion. An iPad or e-reader needed to access e-textbooks is considered hardware and would be coded here.

## 500 CAPITAL OUTLAY.

Expenditures for the acquisition of fixed assets or additions to fixed assets. They are expenditures for: land or existing buildings, improvements of grounds, construction of buildings, additions to buildings, remodeling of buildings, initial equipment, additional equipment, and replacement of equipment.

**510** **Land Acquisition.** Expenditures for the purchase of land.

**520** **Buildings Acquisition.** Expenditures for acquiring buildings and additions, either existing or to be constructed, except for bus garages (See object 562 Bus Garage Purchases). Included are expenditures for installment or lease payment (except interest) which have a terminal date and result in the acquisition of buildings, except payments to public school—housing authorities or similar agencies. Expenditures for major permanent structural alterations and the initial or additional installation of heating; and ventilating systems, electrical systems, plumbing systems, fire protection systems, and other service systems in existing buildings are included also.

**530** **Improvements Other Than Buildings.** Expenditures for the initial and additional improvement of sites and adjacent ways after acquisition by the district. Improvement consists of such work as grading, landscaping, seeding, and planting of shrubs and trees; constructing new sidewalks, roadways, retaining walls, sewers, and storm drains; installing hydrants; initial surfacing and soil treatment of athletic fields and tennis courts; furnishing and installing for the first time, fixing playground apparatus, flagpoles, gateways, fences, and underground storage tanks which are not part of building service systems; and demolition work. Special assessments against the district for capital improvement, such as streets, curbs, and drains are also recorded here.

**540** **Depreciable Equipment.** Expenditures for the initial, additional, and replacement items of equipment; except for buses and capital bus improvements (See object 564 Bus and Capital Improvements). An equipment item is a movable or fixed unit of furniture or furnishings, an instrument, a machine, an apparatus, or a set of articles that meets all of the following conditions:

1. It has an anticipated useful life of more than 1 year.
2. It is of significant value, measured as original cost or estimated market value. The current value threshold is $5,000. The federal value criterion currently is also $5,000.
3. It retains its original shape and appearance with use.
4. It is nonexpendable; that is, if the article is damaged or some of its parts are lost or worn out, it is usually more feasible to repair it than to replace it with an entirely new unit.
5. It does not lose its identity through incorporation into a different or more complex unit or substance.

Additional information related to GASB 34 requirements can be found in the Special Instructions for Recording Expenditures under the section entitled GASB Statement 34 Reporting Requirements at the beginning of Chapter 3.

541 Initial and Additional Equipment Purchase. Expenditures for the initial and additional equipment, such as machinery, furniture, fixtures, and vehicles.

542 Replacement Equipment Purchases. Expenditures for replacement of equipment which has been disposed.

**550** **Depreciable Technology.** Expenditures for computer hardware, related equipment, and other capital outlay for technology. See object 540 Depreciable Equipment for definition of capital outlay.

560 Depreciable Transportation. Expenditures for bus garages, buses, and capital bus improvements for student transportation. See object 540 Depreciable Equipment for definition of capital outlay.

**562** **Bus Garage Purchases.** The purchase of a garage or garage improvements used for student transportation. All purchases using this code must also be listed on the Bus and Garage Depreciation Schedule and Mileage Report (Form 581-3171). All others should be reported under 520 Building Acquisitions.

**564** **Bus and Capital Bus Improvements.** The purchase of buses and capital bus improvements e.g., handicap lift. All purchases using this code must also be listed on the Bus and Garage Depreciation Schedule and Mileage Report (Form 581-3171). All others should be reported under 540 Equipment.

**590** **Other Capital Outlay.** Expenditures for all other Capital Outlay not classified above.

## 600 OTHER OBJECTS.

Amounts paid for goods and services not otherwise classified above. This includes expenditures for retirement of debt, payment of interest on debt, payments to a housing authority, and payment of dues and fees.

**610** **Redemption of Principal.** Expenditures which are from current funds to retire bonds and/or principal portion of contractual payments for capital acquisitions.

620 Interest. Expenditures from current funds for interest on serial bonds, short-term loans and interest included in contractual payments for capital acquisitions. Sub-accounts may be used to record separately these different kinds of interest.

**621** **Regular Interest.** Expenditures for all interest, excluding bus garage, bus, and capital bus improvement interest.

**622** **Bus Garage, Bus, and Capital Bus Improvement Interest.** Only record expenditures for bus garage, bus, and capital bus improvement interest here.

**630** **Unrecoverable Bad Debt Write-Off.**

**640** **Dues and Fees.** Expenditures or assessments for membership in professional or other organizations or associations or payments to a paying agent for services rendered.

**650** **Insurance and Judgments.** Insurance to protect school board members and their employees against loss due to accident or neglect.

651 Liability Insurance. Expenditures for insurance coverage of the district, or its officers, against losses resulting from judgments awarded against the district. Also recorded here are any expenditures (not judgments) made in lieu of liability insurance. Payments of judgments awarded against the district and not covered by insurance are recorded under 655 Judgments and Settlements Against the District.

652 Fidelity Bond Premiums. Expenditures for bonds guaranteeing the district against losses resulting from the actions of the treasurer, employees, or other persons of the district. Also recorded here are any expenditures (not judgments) made in lieu of liability bonds.

653 Property Insurance Premiums. Expenditures for insurance on any type of property owned or leased by the district. Charge to function 2540 Operation and Maintenance of Plant Services for buildings and 2550 Student Transportation Services for school buses.

654 Student Insurance Premiums. Expenditures for premiums on student accident insurance.

655 Judgments and Settlements Against the District. Expenditures from current funds for all judgments against the district that are not covered by liability insurance but are of a type that might have been covered by insurance.

659 Other Insurance and Judgments. Payments for insurance and judgments not classified elsewhere.

**660** **Depreciation (Used for Enterprise and Internal Service Funds Only).** The portion of the cost of a fixed asset, except for land, which is charged as an expense during a particular period. In accounting for depreciation, the cost of a fixed asset, less any salvage value, is allocated over the estimated service life of the asset; and each accounting period is charged with a portion of such cost. Through this process, the cost of the asset is ultimately charged off as an expense. Land is not depreciated.

662 Buildings. Depreciation expense for buildings and additions.

663 Improvements Other Than Buildings. Depreciation expense for improvements to sites other than the building facility. Examples include roadways and sidewalks.

664 Equipment. Depreciation expense for equipment including buses, automobiles, and other vehicles. These items are defined as movable or fixed units of furniture or furnishings, an instrument, a machine, an apparatus, or a set of articles which meet the capital asset criteria.

665 Technology. Depreciation expense for technology, including workstations, servers, and networking equipment.

669 Other Capital Assets. Depreciation expense for capital assets not denoted above.

**670** **Taxes, Licenses and Assessments.** This includes taxes, licenses, and assessments paid to a government body; and penalties assessed for lack of health benefits for eligible employees (Affordable Care Act).

**680** **PERS UAL Lump Sum Payment to PERS.** The one-time lump sum payment made to PERS following the issuance of a Public Employees Retirement System (PERS) Unfunded Actuarial Liability (UAL) Bond. (Use only with function 5400 PERS UAL Bond Lump Sum Payment to PERS.)

**690** **Grant Indirect Charges.** Charges made to a grant to recover charges made to administration. See Chapter 3, Grant Administrative Charges for more detail.

## 700 TRANSFERS.

This object category does not represent a purchase; rather it is used as an accounting entity to show that funds have been handled without having goods and services rendered in return. Included here are transactions for interchanging money from one fund to the other and for transmitting flow-**through funds to the recipient (person or agency).**

**710** **Fund Modifications.** This category represents transactions of conveying money from one fund to another. Generally, this takes the form of payments from the 100 General Fund to some other fund and should be recorded. They are not recorded as expenditures. (Use only with function 5200 Transfers of Funds.) See Chapter 3, Transfers to Other Funds for more detail.

**720** **Transits.** This category represents transactions which are transit or flow-through means to convey money to the recipient (person or agency). This includes transactions which place grants-in-aid, special grants (stipends), as well as tuition and transportation for other district use, in the hands of the user. (Use only with function 5300 Apportionment of Funds by the ESD.)

**790** **Other Transfers.** This category is to be used for those transfer transactions which cannot be identified in the above classifications.

## 800 OTHER USES OF FUNDS.

**810** **Planned Reserve.** Amounts set aside for operating contingencies for expenditures which cannot be foreseen and planned in the budget because of the occurrence of some unusual or extraordinary event. (Use only with function 6110 Operating Contingency.)

**820** **Reserved for Next Year.** (Use only with function 7000 Unappropriated Ending Fund Balance.)

# Expenditure Areas of Responsibility

Area of responsibility codes designate the curriculum areas, provide further program information, or allow additional tracking for management information purposes.

**Bold type** does not indicate required roll up codes; **Bold type** does identify minimum requirements for area codes.

Note: An "X" indicates a rollup of accounts to the digits indicated. For example, a 12XX function represents all functions that have a "12" prefix.

| Function | Description | Designate |
|---|---|---|
| 1121 | Middle School/Junior High Instruction | Curriculum Area |
| 1131 | High School Instruction | Curriculum Area |
| 12XX | Special Education | Maintenance of Effort, if Applicable |
| 1271 | Remediation | Curriculum Area |
| 21XX | Special Education Support | Maintenance of Effort, if Applicable |
| 2190 | Special Education Direction | Maintenance of Effort, if Applicable |
| 2240 | Staff Development | Targeted Training, if Applicable |
| 2550 | Special Education Transportation | Maintenance of Effort, if Applicable |

If salaries are charged to an area code, payroll costs, and fringe benefits must be charged there also as benefits follow salaries. Area codes should be attached to functions as required in all funds.

010 Home Instruction. School district sponsored programs in which a district employee goes to the home to instruct a parent in how to teach a specific lesson to a child or teaches the child directly.

020 Tutoring. Direct instruction of a learner on a specific lesson or skill in a home or in a school setting.

050 General Classroom Instruction. Instructional activities that cannot be classified under a specific curriculum area.

060 Core Areas/Block Classes. Instructional activities combining two or more core curriculum areas in a block class, including English, Social Science, Math, Science.

090 Other Pre-kindergarten Programs. Any pre-kindergarten programs not appropriate for inclusion in the above categories.

**100** **English.** Courses and activities designed to enable students to receive and send communication by developing their ability to listen, speak, read, and write English.

**110** **Social Studies.** Courses and activities dealing with social relationships draw their substance from the disciplines of anthropology, economics, geography, government, history, sociology, and psychology.

**120** **Science.** Experience provides students the opportunity to develop concept understandings and process skills as they relate to scientific literacy.

**130** **The Arts.** Courses and activities designed to develop keener aesthetic awareness and increase sensitivity, skills, and knowledge in various two- and three- dimensional art media. Performing Arts. Extracurricular activities designed to provide opportunities for students to participate in producing or performing capacities in dramatics, music, television, or radio. Music. Courses are designed to develop aesthetic sensitivity, skills, and knowledge; in relation to listening, performing, and creating experiences in vocal or instrumental music.

170 Driver Education. Learning experiences concerned with helping students participate safely, efficiently, and effectively in operating an automobile in traffic.

**180** **Mathematics.** Those courses, units of instruction, and activities designed to develop the skills and interests of students in computation and problem solving.

190 Health Education. Experiences which provide students the opportunity to develop decision making skills and formulate a value system, as they relate to healthful living.

200 Physical Education. Courses, special adapted programs, and intraschool activities designed to enable each student to build and maintain physical powers, skills, and understanding necessary for optimum development.

**210** **Second Language.** Courses and activities designed to enable students to receive and send communication in a language other than English by developing their ability to listen, speak, read, and write in the target language.

230 Athletics. Extracurricular activities designed to provide competitive contests for selected groups or individuals who are trained and coached to play games with similar teams or individuals from other schools.

250 Other Extracurricular Student Activities. Extracurricular activities not already defined which are generally of a voluntary nature and which are designed to assist the student in developing additional skills and/or refined attitudinal points of view regarding logical extensions of the school curriculum.

260 Technology. Courses designed to develop skills in the use of technology.

270 Career Related Learning. Courses, units of instruction and special instructional activities designed to assist students in exploring key occupational career areas, in assessing their occupational interests and aptitudes and in developing tentative career plans and choices. Grades 7 through 12.

**280** **English Language Learner (ELL) Programs.** To be used with functions other than 1291 English Language Learner – ORS 336.079 and 1295 English Language Learner – Non ORS 336.079 to identify supplemental costs for English Language Learner (ELL) programs.

290 Other Programs.

310 Non-Instructional Staff Development. Use of this area code is optional. Districts may wish to track staff development and training costs charged to functions other than 2240 Instructional Staff Development.

**320** **Special Education.** All special education costs that are subject to federal maintenance of effort requirements. All special education expenditures, including 1250 Less Restrictive Programs for Students with Disabilities, need to be reported to the state at the district level. Attach this area code to functions (e.g. 1200's Special Programs, 2100's Support Services - Students, 2200's Support Services – Instructional Staff, 2550's Student Transportation Services) where services are provided to students on IEP's. In the 1200 Special Programs functions, this includes functions 1220 Restrictive Programs for Students with Disabilities through 1260 Treatment and Habilitation. It does not include 1210 TAG, 1270 Educationally Disadvantaged, 1280 Alternative Education, or 1290's Designated Programs unless you are also providing special education services within those programs. Special education staff development function 2240 Instructional Staff Development is included in this area code.

**340** **Coordinating Early Intervening Services (CEIS).** Services which may include interagency financing structures, for students in kindergarten through grade 12 (with particular emphasis on students in K-3) who have not been identified as needing special education or related services but who need additional academic and behavioral services or support to succeed in a general education environment. IDEA 2004 Sec. 613(4)(f) This area code is to be used only for CEIS. Do not code Section 504 expenses here.

**350** **School Improvement Fund Grant.** Expenditures in either the 100 General Fund or a 200 Special Revenue Funds to record monies spent to fulfill SIF grant obligations.

Professional, Technical Strands. Students working on Professional, technical strands as the context for their academic program. Some areas may be in more than one strand. For example, marketing could be offered under 510 Arts and Communication or under 520 Business and Management. Transition:

500 General Professional, Technical Strands.

510 Arts and Communication. Examples: Architecture, film, radio, fine arts, creative writing, journalism, languages, television, advertising, public relations, graphic design.

520 Business and Management. Examples: Marketing sales, entrepreneurship, finance, hospitality/tourism, computer/information systems, accounting, personnel, and economics.

530 Health Services. Examples: Nursing, dental hygiene, dental assistant, medical assistant, radiology technician, ophthalmic technician, nurse's aide, dentistry, medicine.

540 Human Resources. Examples: education, government, religion, social services, law, law enforcement, legal services, child and family services.

550 Industrial and Engineering Systems. Examples: Engineering, manufacturing, construction, related technologies, precision production.

560 Natural Resources Systems. Examples: Agriculture, earth sciences, fisheries, environmental sciences, horticulture, wildlife, forestry.

570 Other Professional, Technical Strands. Defined by the District.

580 Other Professional, Technical Strands. Defined by the District.

590 Other Professional, Technical Strands. Defined by the District.



# Descriptions of Balance Sheet Accounts

## ASSETS AND OTHER DEBITS

Assets and other debits include what is owned and other items not owned as of the date of the balance sheet but expected to become fully owned at some future date as well as other budgeting and offsetting accounts which normally have debit balances.

### 100 Current Assets.

Cash or anything that can be readily converted into cash.

101 Cash in the Bank. All funds on deposit with a bank or savings and loan institution normally in non-interest-bearing accounts. Interest bearing accounts are recorded in investments.

102 Cash on Hand. Currency, coins, checks, postal and express money orders, and bankers' drafts on hand.

103 Petty Cash. A sum of money set aside for the purpose of paying small obligations for which the issuance of a formal voucher and check would be too expensive and time consuming.

104 Change Cash. A sum of money set aside for the purpose of providing change.

105 Cash with Fiscal Agents. Deposits with fiscal agents, such as commercial banks, for the payment of matured bonds and interest.

106 Cash and Investments to Repay Short-term Notes.

111 Investments. Securities and real estate held for the production of income in the form of interest, dividends, rentals, or lease payments. The account does not include fixed assets used in district operations. Separate accounts for each category of investments may be maintained.

112 Unamortized Premiums on Investments. The excess of the amount paid for securities over the face value which has not yet been amortized. Use of this account is restricted to long-term investments.

113 Unamortized Documents on Investments (credit). The excess of the face value of securities over the amount paid for them which has not yet been written off. Use of this account is normally restricted to long-term investments.

114 Interest Receivable on Investments. The amount of interest receivable on investments, exclusive of interest purchased. Interest purchased should be shown in a separate account.

115 Accrued Interest on Investments Purchased. Interest accrued on investments between the last interest payment date and date of purchase. The account is carried as an asset until the first interest payment date after date of purchase. Upon receipt and deposit of the cash, an entry is made debiting 101 Cash in the Bank, and crediting 115 Accrued Interest on Investments Purchased for the amount of interest purchased, and revenue source 1510 Interest on Investments for the balance.

121 Taxes Receivable. The uncollected portion of taxes which a district or governmental unit has levied and which has become due, including any interest or penalties which may be accrued. Separate accounts may be maintained on the basis of tax roll year and/or current and delinquent taxes.

122 Estimated Uncollectible Taxes (Credit). A provision for that portion of taxes receivable which it is estimated will not be collected. The account is shown on the balance sheet as a deduction from the Taxes Receivable account in order to arrive at the net taxes receivable. Separate accounts may be maintained on the basis of tax roll year and/or delinquent taxes.

131 Interfund Loans Receivable. An asset account used to record a loan by one fund to another fund in the same governmental unit. It is recommended that separate accounts be maintained for each interfund receivable loan.

132 Interfund Accounts Receivable. An asset account used to indicate amounts owed to a particular fund by another fund in the same district for goods sold or services rendered. It is recommended that separate accounts be maintained for each interfund receivable.

141 Intergovernmental Accounts Receivable. Amounts due to the reporting governmental unit from another governmental unit. These amounts may represent grants-in-aid, shared taxes, taxes collected for the reporting unit by another unit, loans, and charges for services rendered by the reporting unit for another government. It is recommended that separate accounts be maintained for each interagency receivable.

151 Loans Receivable. Amounts which have been loaned to persons or organizations, including notes taken as security for such loans, where permitted by statutory authority.

152 Estimated Uncollectible Loans. A provision for that portion of loans receivable which is estimated will not be collected. The account is shown on the balance sheet as a deduction from the Other Loans Receivable account.

153 Other Accounts Receivable. Amounts owing an open account from private persons, firms, or corporations for goods and services furnished by a district (but not including amounts due from other funds or from other governmental units).

154 Estimated Uncollectible Accounts Receivable. A provision for that portion of accounts receivable which is estimated will not be collected. The account is shown on the balance sheet as a deduction from the 153 Other Accounts Receivable account.

161 Bond Proceeds Receivable. An account used to designate the amount receivable upon sale of bonds.

171 Inventories for Consumption. The cost of supplies and equipment on hand not yet distributed to requisitioning units.

172 Inventories for Resale. The value of goods held by a district for resale rather than for use in its own operations.

181 Prepaid Expenses. Expenses paid for benefits not yet received. Prepaid expenses differ from deferred charges in that they are spread over a shorter period of time than deferred charges and are regularly recurring costs of operation. Examples of prepaid expenses are prepaid rent, prepaid interest, and unexpired insurance premiums. An example of a deferred charged is unamortized discounts on bonds sold.

191 Deposits. Funds deposited by the district as prerequisite to receiving services and/or goods.

199 Other Current Assets. Current assets not provided for elsewhere.

## 200 Fixed Assets.

Those assets which the district intends to hold or continue in use over a long period of time.

211 Sites. A fixed asset account which reflects the acquisition value of land owned by a district. If land is purchased, this account includes the purchase price and costs, such as legal fees, filing and excavation costs, and other associated improvement costs which are incurred to put the land in condition for its intended use. If land is acquired by gift, the account reflects its appraised value at time of acquisition.

221 Site Improvements. A fixed asset account which reflects the acquisition value of permanent improvement, other than buildings, which add value to land. Examples of such improvements are fences, retaining walls, sidewalks, pavements, gutters, tunnels, and bridges. If the improvements are purchased or constructed, this account contains the purchase or contract price. If improvements are obtained by gift, it reflects the appraised value at time of acquisition.

222 Accumulated Depreciation on Site Improvements. Accumulated amounts for depreciation of land improvements. The recording of depreciation is optional in the general fixed assets account group.

231 Buildings and Building Improvements. A fixed asset account which reflects the acquisition value of permanent structures used to house persons and property owned by the district. If buildings are purchased or constructed, this account includes the purchase or contract price of all permanent buildings and the fixtures attached to and forming a permanent part of such buildings. This account includes all building improvements. If buildings are acquired by gift, the account reflects their appraised value at time of acquisition.

232 Accumulated Depreciation on Buildings and Building Improvements. Accumulated amounts for depreciation of buildings and building improvements. The recording of depreciation is optional in the general fixed assets account group.

241 Machinery and Equipment. Tangible property of a more or less permanent nature, other than land, buildings, or improvements thereto, which is useful in carrying on operations. Examples are machinery, tools, trucks, cars, buses, furniture, and furnishings.

242 Accumulated Depreciation on Machinery and Equipment. Accumulated amounts for depreciation of machinery and equipment. The recording of depreciation is optional in the general fixed assets account group and required in the proprietary funds.

251 Construction in Progress. The cost of construction work undertaken but not yet completed.

## 300 Budgeting Accounts and Other Debits.

Budgeted and actual amounts of revenues as well as offsetting accounts which normally have debit balances.

301 Estimated Revenues (Budget Account). The amount of revenues estimated to be received or to become receivable during the fiscal period, the account is closed out and does not appear in the balance sheet. This account would appear in interim financial statements.

302 Revenues. The total of all revenues realized during a period. This represents the increase in ownership equity during a designated period of time. The account appears only in a balance sheet prepared during the fiscal period. At the end of the fiscal period, the account is closed out and does not appear in the balance sheet.

303 Amount Available in 300 Debt Service Funds. An account in the General Long-Term Debt Account Group which designates the amount of fund balance available in the 300 Debt Service Fund for the retirement of long-term debt.

304 Amount to Be Provided for Retirement of General Long-Term Debt. An account in the General Long-Term Account Group which designates the amount to be provided from taxes or other revenue to retire long-term debt.

## LIABILITIES, RESERVES AND FUND BALANCES

Liabilities, reserves, and fund balance are district debts plus items which are not debts but which may become debts at some future time, as well as other budgeting accounts which normally appear only on the interim financial statements.

### 400 Current Liabilities.

Those debts the district expects to pay within a short period of time, usually within a year or less.

401 Interfund Loans Payable. A liability account used to record a debt owed by one fund to another fund in the same governmental unit. It is recommended that separate accounts be maintained for each interfund loan.

402 Interfund Accounts Payable. A liability account used to indicate amounts owned by a particular fund to another fund in the same district for goods and services rendered. It is recommended that separate accounts be maintained for each interfund payable.

411 Intergovernmental Accounts Payable. Amounts owed by the reporting district to another governmental unit. It is recommended that separate accounts be maintained for each interagency payable.

421 Accounts Payable. Liabilities on an open account owing to private persons, firms, or corporations for goods and services received by a district (but not including amounts due to other funds of the same district or to other governmental units).

422 Judgments Payable. Amounts due to be paid by a district as the result of court decisions, including condemnation awards in payment for private property taken for public use.

423 Warrants Payable. Amounts due to designated payees in the form of a written order drawn by the district directing the district treasurer to pay a specific amount.

431 Contracts Payable. Amounts due on contracts for assets, goods, and services received by a district.

432 Construction Contracts Payable—Retained Percentage. Liabilities on account of construction contracts for that portion of the work which has been completed but on which part of the liability has not been paid pending final inspection, or the lapse of a specified time period or both. The unpaid amount is usually a stated percentage of the contract price.

433 Construction Contracts Payable. Amounts due by a district on contracts for construction of buildings, structures, and other improvements.

441 Matured Bonds Payable. Bonds which have reached or passed their maturity date but which remain unpaid.

442 Bonds Payable. Bonds which have not reached or passed their maturity date but are due within one year or less.

443 Unamortized Premiums on Bonds Sold. An account which represents that portion of the excess of bond proceeds over par value and which remains to be amortized over the remaining life of such bonds.

451 Loans Payable. Short-term obligations representing amounts borrowed for short periods of time usually evidenced by notes payable or warrants payable.

455 Interest Payable. Interest due within one year.

461 Accrued Salaries and Benefits. Salary and fringe benefit costs incurred during the current accounting period are not payable until a subsequent accounting period.

471 Payroll Deductions and Withholdings. Amounts deducted from employees' salaries for withholding taxes and other purposes. District-paid benefits amounts payable also are included. A separate liability account may be used for each type of benefit.

481 Deferred Revenues. A liability account which represents revenues collected before they become due.

491 Deposits Payable. Liability for deposits received as a prerequisite to providing or receiving services and/or goods.

492 Due to Fiscal Agent. Amounts due to fiscal agents, such as commercial banks, for serving a district's matured indebtedness.

499 Other Current Liabilities. Other current liabilities not provided elsewhere.

## 500 Long-Term Liabilities. Debt with a maturity of more than one year after the date of issuance.

511 Bonds Payable. Bonds which have not reached or passed their maturity date, and which are not due within one year.

521 Loans Payable. An unconditional written promise signed by the maker to pay a certain sum of money one year or more after the date of issuance.

531 Lease Obligations. Amounts remaining to be paid on lease purchase agreements.

541 Unfunded Pension Liabilities. The amount of the actuarial deficiency on a locally operated pension plan to be contributed by the district on behalf of present employees.

590 Other Long-Term Liabilities. Other long-term liabilities not provided elsewhere.

## 600 Budgeting Accounts.

These categories represent accounts which reflect budgeted and actual amounts related to expenditures and encumbrances.

601 Appropriations (Budget Account). This account records authorizations granted by the school board or legislative body to make expenditures for specific purposes. This account appears in a balance sheet prepared during the fiscal period. It is closed out and does not appear in the balance sheet prepared at the close of the fiscal period.

602 Expenditures. This account appears in balance sheets prepared during the fiscal period and designates the total of expenditures charged against appropriations during such period. The account is shown in each balance sheet as a deduction from the Appropriations account to arrive at the unexpended balance of total appropriations.

603 Encumbrances. This account designates obligations in the form of purchase orders, contracts, or salary commitments which are chargeable to an appropriation and for which part of the appropriation is reserved. In an interim balance sheet, encumbrances are deducted along with the expenditures from the Appropriations account to arrive at the unencumbered balance.

## 700 Fund Equity.

These are accounts which show the excess of a fund over its liabilities. Portions of that balance may be reserved for future use.

701 Investment in General Fixed Assets. An account in the general fixed assets account group which represents the district's equity in general fixed assets. The balance of this account is normally subdivided according to the source of funds which financed the asset acquisition, such as 100 General Fund revenues, bond issues, and contributions.

721 Contributed Capital. An equity account in the proprietary funds which shows the amount of fund capital contributed by the governmental unit from general government revenue and resources. Annual subsidies to cover operating deficits are not recorded here. These amounts are recorded as other sources (interfund transfers) and close to the 740 Unreserved Retained Earnings account.

730 Reserve for (Special Purposes)—Retained Earnings. The accumulated earnings of the proprietary funds which have been retained in the fund and which are reserved for a specific purpose. One example would be funds reserved for the future purchase of equipment.

740 Unreserved Retained Earnings. The accumulated earnings of the proprietary funds which have been retained in the fund and which are not reserved for any specific purpose.

760 Other than Unassigned (Special Purposes)—Fund Balance. A reserve which represents the segregation of a portion of a fund balance to indicate that assets equal to the amount of the reserve are tied up and are, therefore, not available for appropriation. It is recommended that a separate reserve be established for each special purpose. One example of a special purpose would be restricted federal programs.

761 Non-spendable Fund Balance. Amounts that cannot be spent due to form; for example, inventories and prepaid amounts. Also, long-term loan and notes receivables, and property held for resale would be reported here unless the proceeds are restricted, committed or assigned. Or amounts that must be maintained intact legally or contractually (corpus or principal of a permanent fund).

762 Restricted Fund Balance. Amounts constrained for a specific purpose by external parties, constitutional provision or enabling legislation.

763 Committed Fund Balance. Amounts constrained for a specific purpose by a government using its highest level of decision-making authority. It would require action by the same group to remove or change the constraints placed on the resources. Action to constrain resources must occur prior to year-end; however, the amount can be determined in the subsequent period.

764 Assigned Fund Balance. Amounts intended to be used by the governing body for specific purposes. Amounts reported as assigned should not result in a deficit in unassigned fund balance. In the general fund assigned fund balance represents the amount that is not restricted or committed.

770 Unassigned Fund Balance. In the general fund, amounts not contained in other classifications i.e., non-spendable, restricted, committed or assigned. The general fund is the only fund that would report a positive amount in unassigned fund balance. For all governmental funds other than the general fund, amounts expended in excess of resources that are non-spendable, restricted, committed or assigned (a residual deficit). In determining a residual deficit, no amount should be reported as assigned.

# Appendix A

## Terminology

The following explanations of terms are drawn primarily from *Governmental Accounting, Auditing and Financial Reporting* (GAAFR), published by the Government Finance Officers Association, 1944, Chicago, Illinois.

**ACCOUNTING SYSTEM:** The methods and records established to identify, assemble, analyze, classify, record and report a government's transactions and to maintain accountability for the related assets and liabilities.

**ACCOUNTS PAYABLE:** A short-term liability account reflecting amounts owed to private persons or organizations for goods and services received by a government.

**ACCOUNTS RECEIVABLE:** An asset account reflecting amounts due from private persons or organizations for goods and services furnished by a government (but not including amounts due from other funds or other governments).

**ACCRUAL BASIS:** The recording of the financial effects on a government of transactions and other events and circumstances that have cash consequences for the government in the periods in which cash is received or paid by the government.

**ACCUMULATED DEPRECIATION:** A contra-asset account used to report the accumulation of periodic credits to reflect the expiration of the estimated service life of fixed assets.

**ACTIVITY:** A specific and distinguishable service performed by one or more organizational components of a government to accomplish a function for which the government is responsible.

**ACTUARIAL BASIS:** A basis used in computing the amount of contributions to be made periodically to a fund or account so that the total contributions plus the compounded earnings thereon will equal the required payments to be made out of the fund or account. The factors considered in arriving at the amount of these contributions include the length of time over which each contribution is to be held and the rate of return compounded on such contribution over its life. A pension trust fund for a PERS is an example of a fund concerned with actuarial basis data.

**AD VALOREM TAX:** A tax based on value (e.g., a property tax).

**ALLOT:** To divide a budgetary appropriation into amounts that may be encumbered or expended during an allotment period.

**APPROPRIATION:** A legal authorization granted by a legislative body to make expenditures and to incur obligations for specific purposes. An appropriation usually is limited in amount and time it may be expended.

**ARBITRAGE:** Classically, the simultaneous purchase and sale of the same or an equivalent security in order to profit from price discrepancies. In government finance, the most common occurrence of arbitrage involves the investment of the proceeds from the sale of tax- exempt securities in a taxable money market instrument that yields a higher rate, resulting in interest revenue in excess of interest costs.

**ASSESSED VALUATION:** A valuation set upon real estate or other property by a government as a basis for levying taxes.

**ASSET:** A probable future economic benefit obtained or controlled by a particular entity as a result of past transactions or events.

**BALANCE SHEET:** The financial statement disclosing the assets, liabilities, and equity of an entity at a specified date in conformity with GAAP.

**BASIC FINANCIAL STATEMENTS:** Those financial statements, including notes thereto, necessary for the fair presentation of the financial position and results of operations of an entity in conformity with GAAP. The basic financial statements include a balance sheet, an "all-inclusive" operating statement, a budget comparison statement (for all governmental funds for which annual appropriated budgets are adopted), and a statement of changes in financial position (for proprietary funds, pension trust funds, and nonexpendable trust funds).

**BASIS OF ACCOUNTING:** A term used to refer to *when* revenues, expenditures, expenses, and transfers—and the related assets and liabilities—are recognized in the accounts and reported in the financial statements. Specifically, it relates to the *timing* of the measurements made, regardless of the nature of the measurement, on either the cash or the accrual method.

**BOND:** Most often, a written promise to pay a specified sum of money (called the face value or principal amount), at a specified date or dates in the future, called the maturity date(s), together with periodic interest at a specified rate. Sometimes, however, all or a substantial portion of the interest is included in the face value of the security. The difference between a note and a bond is that the latter is issued for a longer period and requires greater legal formality.

**BUDGET:** A plan of financial operation embodying an estimate of proposed expenditures for a given period and the proposed means of financing them. Used without any modifier, the term usually indicates a financial plan for a single fiscal year. The term "budget" is used in two senses in practice. Sometimes it designates the financial plan presented to the appropriating governing body for adoption, and sometimes, the plan is finally approved by that body.

**BUDGETARY CONTROL:** The control or management of a government or enterprise in accordance with an approved budget to keep expenditures within the limitations of available appropriations and available revenues.

**BUDGET DOCUMENT:** The instrument used by the budget-making authority to present a comprehensive financial program to the appropriating governing body. The budget document usually consists of three parts. The first part contains a message from the budget-making authority, together with a summary of the proposed expenditures and the means of financing them. The second consists of schedules supporting the summary. These schedules show in detail the past years' actual revenues, expenditures, and other data used in making the estimates. The third part is composed of drafts of the appropriation, revenue, and borrowing measures necessary to put the budget into effect.

**BUDGET MESSAGE:** A general discussion of the proposed budget as presented in writing by the budget-making authority to the legislative body. The budget message should contain an explanation of the principal budget items, an outline of the government's experience during the past period, its financial status at the time of the message, and recommendations regarding the financial policy for the coming period.

**CAPITAL BUDGET:** A plan of proposed capital outlays and the means of financing them.

**CAPITAL EXPENDITURES:** Expenditures resulting in the acquisition of or addition to the government's general fixed assets.

**CAPITAL PROGRAM:** A plan for capital expenditures to be incurred each year over a fixed period of years to meet capital needs arising from the long-term work program or other capital needs. It sets forth each project or other contemplated expenditure in which the government is to have a part and specifies the resources estimated to be available to finance the projected expenditures.

**CASH:** Cash includes currency on hand and demand deposits with banks or other financial institutions. Cash also includes deposits in other kinds of accounts that have the general characteristics of demand deposit accounts.

**CASH BASIS:** A basis of accounting under which transactions are recognized only when cash is received or disbursed.

**COMPREHENSIVE ANNUAL FINANCIAL REPORT (CAFR):** The official annual report of a government. It includes (a) the five combined financial statements in the combined statements—overview and their related notes (the "liftable" GPFS) and (b) combining statements by fund type, individual fund, and account group financial statements prepared in conformity with GAAP and organized into a financial reporting pyramid. It also includes supporting schedules necessary to demonstrate compliance with finance-related legal and contractual provisions, required supplementary information, extensive introductory material, and detailed statistical section. Every government reporting entity should prepare a CAFR.

**COST:** The amount of money or other consideration exchanged for goods or services.

**COST ACCOUNTING:** The method of accounting that provides for the assembling and recording of all the elements of cost incurred to accomplish a purpose, to carry on an activity or operation, or to complete a unit of work or a specific job.

**CURRENT:** As applied to budgeting and accounting, designates the operations of the present fiscal period as opposed to past or future periods. It usually connotes items likely to be used up or converted into cash within one year.

**DEBT:** An obligation resulting from the borrowing of money or from the purchase of goods and services. Debts of governments include bonds, time warrants, and notes.

**DEFICIT:** (1) The excess of the liabilities of a fund over its assets. (2) The excess of expenditures over revenues during an accounting period or, in the case of proprietary funds, the excess of expenses over revenues during an accounting period.

**DEPRECIATION:** (1) Expiration in the service life of fixed assets, other than wasting assets, attributable to wear and tear, deterioration, action of the physical elements, inadequacy; and obsolescence. (2) The portion of the cost of a fixed asset, other than a wasted asset, charged as an expense during a particular period. In accounting for depreciation, the cost of a fixed asset, less any salvage value, is prorated over the estimated service life of such an asset, and each period is charged with a portion of such cost. Through this process, the entire cost of the asset is ultimately charged off as an expense.

**DOUBLE ENTRY:** A system of bookkeeping requiring that for every entry made to the debit side of an account or accounts, an entry or entries be made for an equal amount to the credit side of another account or accounts.

**ENCUMBRANCES:** Commitments related to unperformed (executory) contracts for goods or services. Used in budgeting, encumbrances are not GAAP expenditures or liabilities, but represent the estimated amount of expenditures ultimately to result if unperformed contracts in process are completed.

**ENTITY:** (1) The basic unit upon which accounting and/or financial reporting activities focus. The basic governmental legal and accounting entity is the individual fund and account group. (2) That combination of funds and account groups that constitutes the reporting entity for financial reporting purposes and alone may issue Annual Comprehensive Financial Reports (ACFR) and Governmental Financial Statements.

**EQUITY ACCOUNTS:** Those accounts presenting the difference between assets and liabilities of the fund.

**EXPENDITURES:** Decreases in net financial resources. Expenditures include current operating expenses requiring the present or future use of net current assets, debt service, entitlements and shared revenues.

**FINANCIAL AUDIT:** An audit made to determine whether the financial statements of a government are presented fairly in conformity with GAAP.

**FISCAL YEAR:** A 12-month period to which the annual operating budget applies and at the end of which a government determines its financial position and the results of its operations.

**FIXED ASSETS:** Long-lived tangible assets obtained or controlled as a result of past transactions, events or circumstances. Fixed assets include buildings, equipment, improvements other than buildings, and land. In the private sector, these assets are referred to most often as property, plants, and equipment.

**FIXTURES:** Attachments to buildings that are not intended to be removed and cannot be removed without damage to the buildings. Those fixtures with a useful life presumed to be as long as that of the building itself, are considered a part of the building; all others are classified as equipment.

**FUNCTION:** A group of related activities aimed at accomplishing a major service or regulatory program for which a government is responsible (e.g., public safety).

**FUND:** A fiscal and accounting entity with a self-balancing set of accounts in which cash or other financial resources, all related liabilities and residual equities, or balances, and changes therein, are recorded and segregated to carry on specific activities or attain certain objectives in accordance with special regulations, restrictions, or limitations.

**FUND BALANCE:** The difference between fund assets and fund liabilities of governmental and similar trust funds.

**FUND TYPE:** Any one of seven categories into which all funds are classified in governmental accounting. The seven fund types are: general, special revenue, debt service, capital projects, enterprise, internal service, and trust and agency.

**GENERAL FUND:** The fund used to account for all financial resources, except those required to be accounted for in another fund.

**GENERAL OBLIGATION BONDS PAYABLE:** Bonds backed by the full faith and credit of government.

**GENERALLY ACCEPTED ACCOUNTING PRINCIPLES (GAAP):** Uniform minimum standards and guidelines for financial accounting and reporting. They govern the form and content of the financial statements of an entity. GAAP encompasses the conventions, rules, and procedures necessary to define accepted accounting practice at a particular time. They include not only broad guidelines of general application, but also detailed practices and procedures. GAAP provides a standard by which to measure financial presentations. The primary authoritative body on the application of GAAP to state and local governments is the GASB.

**GENERALLY ACCEPTED AUDITING STANDARDS (GAAS):** Standards established by the AICPA for the conduct and reporting of financial audits. There are 10 basic GAAS, classed into three broad categories: general standards, standards of field work, and standards of reporting. The Auditing Standards Board of the AICPA publishes SAS to comment upon and expand upon these basic standards. These SAS, together with the 10 basic standards, constitutes GAAS. These GAAS set forth the objectives of the audit and establish measures that can be applied to judge the quality of its performance.

**GENERAL PURPOSE FINANCIAL STATEMENTS (GPFS):** Five combined financial statements that, together with the accompanying notes, constitute the minimum financial reporting needed for fair presentation in conformity with GAAP. These five combined financial statements, with their accompanying notes, make up the first of the financial reporting pyramid's three reporting levels containing financial statements. Known as the combined statements—overview, these statements include: (1) combined balance sheet—all fund types and account groups; (2) combined statement of revenues, expenditures, and changes in fund balances—all governmental fund types; (3) combined statement of revenues, expenditures and changes in fund balances—budget and actual—general and special revenue fund types (and similar governmental fund types for which annual budgets have been legal adopted); (4) combined statement of revenues, expenses and changes in retained earnings (or equity)—all proprietary fund types; and (5) combined statement of changes in financial position—all proprietary fund types. Trust fund operations may be reported in (2), (4), and (5) above, as appropriate, or separately. The combined statements—overview are also referred to as the "liftable" GPFS.

**GOVERNMENTAL ACCOUNTING STANDARDS BOARD (GASB):** The authoritative accounting and financial reporting standard- setting body for government entities.

**GROSS BONDED DEBT:** The total amount of direct debt of a government, represented by out- standing bonds before deduction of any assets available and earmarked for their retirement.

**INTERNAL AUDITING:** An independent appraisal of the diverse operations and controls within a government entity to determine whether acceptable policies and procedures are followed, established standards are met, resources are used efficiently and economically, and the organization's objectives are being achieved. The term covers all forms of appraisal of activities undertaken by auditors working for and within an organization.

**INTERNAL CONTROL STRUCTURE:** Policies and procedures established to provide reasonable assurance that specific government objectives will be achieved.

**INVENTORY:** (1) A detailed list showing qualities, descriptions, and values of property; and, frequently, units of measure and unit prices. (2) An asset account reflecting the cost of goods held for resale or for use in operations.

**LEVY:** (1) (Verb) To impose taxes, special assessments or service charges for the support of government activities. (2) (Noun) The total amount of taxes, special assessments or service charges imposed by a government.

**LIABILITIES:** Probable future sacrifices of economic benefits, arising from present obligations of a particular entity to transfer assets or provide services to other entities in the future as a result of past transactions or events.

**MEASUREMENT FOCUS:** The accounting convention that determines (1) which assets and which liabilities are included on a government's balance sheet and where they are reported there and (2) whether an operating statement presents information on the flow of financial resources (revenues and expenditures) or information on the flow of economic resources (revenues and expenses).

**MODIFIED ACCRUAL BASIS:** The accrual basis of accounting adapted to the governmental fund-type measurement focus. Under it, revenues and other financial resource increments (e.g., bond issue proceeds) are recognized when they become susceptible to accrual that is when they become both "measurable" and "available to finance expenditures of the current period." "Available" means collectible in the current period or soon enough thereafter to be used to pay liabilities of the current period. Expenditures are recognized when the fund liability is incurred except for (1) inventories of materials and supplies that may be considered expenditures either when purchased or when used and (2) prepaid insurance and similar items that may be considered expenditures either when paid for or when consumed. All governmental funds and expendable trust funds and agency funds are accounted for using the modified accrual basis of accounting.

**NET INCOME:** Proprietary fund excess of operating revenues, nonoperating revenues, operating transfers in over operating expenses, nonoperating expenses, and operating transfers out.

**OBJECT:** As used in expenditure classification, applies to the article purchased or the service obtained, rather than to the purpose for which the article or service was purchased or obtained (e.g., personal services, contractual services, and materials and supplies).

**OPERATING BUDGET:** Plans of current expenditures and the proposed means of financing them. The annual operating budget (or, in the case of some state governments, the biennial operating budget) is the primary means by which most of the financing, acquisition, spending, and service delivery activities of a government are controlled. The use of annual operating budgets is usually required by law. Even when not required by law, however, annual operating budgets are essential to sound financial management and should be adopted by every government.

**OPERATING EXPENSES:** Proprietary fund expenses related directly to the fund's primary activities.

**OVERHEAD:** Those elements of cost necessary in the production of a good or service which are not directly traceable to the product or service. Usually, these costs relate to objects of expenditure that do not become an integral part of the finished product or service, such as rent, heat, light, supplies, management, and supervision.

**PERMANENT TAX RATE LIMIT:** The maximum rate of ad valorem property taxes that a school district can impose. Taxes generated from the permanent rate limit can be used for any purpose. No action of the school district can increase a permanent rate limit.

**PROGRAM BUDGET:** A budget wherein expenditures are based primarily on programs of work and secondarily on character and object class, on the one hand, and performance, on the other.

**PROJECTED TOTAL-LIFE COST:** The total anticipated costs related to a fixed asset during its estimated useful life. Projected total-life cost normally includes a detailed schedule of maintenance requirements for each year of the asset's life, including preventive maintenance, normal repair and replacement, and replacement of major parts or components needed to achieve the normal (intended) life of the asset. The total-life cost is calculated at the time an asset is acquired or constructed, often as an integral part of capital acquisition or budgeting procedures.

**PURCHASE ORDER:** A document authorizing the delivery of specified merchandise or the rendering of certain services and the making of a charge for them.

**REPLACEMENT COST:** The amount of cash or other considerations that would be required today to obtain the same asset or its equivalent.

**REQUISITION:** A written demand or request, usually from one department to the purchasing officer or to another department, for specified articles or services.

**REVENUES:** (1) Increases in the net current assets of a governmental fund type from other than expenditure refunds and residual equity transfers. Also, general long-term debt proceeds and operating transfers-in are classified as "other financing sources" rather than as revenues. (2) Increases in the net total assets of a proprietary fund type from other than expense refunds, capital contributions, and residual equity transfers. Also, operating transfers in are classified separately from revenues.

**STANDARD COST:** The predetermined cost of performing an operation or producing a product when labor, materials, and equipment are used efficiently under reasonable and normal conditions. Normal conditions exist when there is an absence of special or extraordinary factors affecting the quality or quantity of the work performed or the time or method of performing it.

**SUBFUNCTION:** A grouping of related activities within a particular government function.

**UNENCUMBERED APPROPRIATION:** That portion of an appropriation not yet expended or encumbered.

**WORK ORDER:** A written order authorizing and directing the performance of a certain task and issued to the person who is to direct the work. Among the items of information included on the order are the nature and location of the job; specifications of the work to be performed and a job number, which is referred to in reporting the amount of labor; as well as materials and equipment used.

# Appendix B

## Analysis of Student Body Funds

The following questions will help to determine whether or not the student body funds should be classified as governmental and should be budgeted. The more often the choices and accurately describe the funds, the more likely the funds should be classified as governmental and budgeted.

I. Who has the responsibility for the account?

A. Who authorizes the revenues? (Sets admission prices, establishes fees, authorizes and activity)

1. Student organization
2. School district personnel

B. Who authorizes the expenditures?

1. Student organization
2. School district personnel

C. How are the expenditures authorized?

1. Student organization minutes
2. School district memorandum
3. Other

II. Who has control over the account?

A. Who receives the revenue?

1. Student organization
2. School district personnel

B. Who deposits the revenue?

1. Student
2. School district personnel

C. Who signs the checks or purchase orders?

1. Student
2. School district personnel

III. Who has custody of the account?

A. In whose name is the account?

1. Student organization
2. School district
3. Other

B. Who prepares the checks?

1. Student
2. School district personnel

C. Who receives and reconciles the bank statement?

1. Student organization
2. School district

D. Who has custody of the supporting documents (cancelled checks, receipts, purchase orders, etc.)?

1. Student organization
2. School district

# Appendix C

## Sources of Accounting and Budget Information

### *Governmental Accounting, Auditing, and Financial Reporting Manual (GAAFR)*

Government Finance Officers Association
203 N. LaSalle Street, Suite 2700
Chicago, IL 60601

### *Oregon Revised Statutes of Interest:*

Chapter 294—Local Budget Law
Chapter 326—State Administration of Elementary and Secondary Education
Chapter 327—State Financing of Elementary and Secondary Education
Chapter 328—Local Financing of Education
Chapter 332—Local Administration of Education

### *Oregon Administrative Rules of Interest:*

Chapter 150—Oregon Department of Revenue
Chapter 581—Oregon Department of Education

### *Local Budgeting Manual*

Finance and Taxation Unit
Oregon Department of Revenue
PO Box 14380
Salem, OR 97309-5075

### *District Elections Manual*

Secretary of State Elections Division
Public Service Building Suite 501
255 Capitol Street NE
Salem, OR 97310

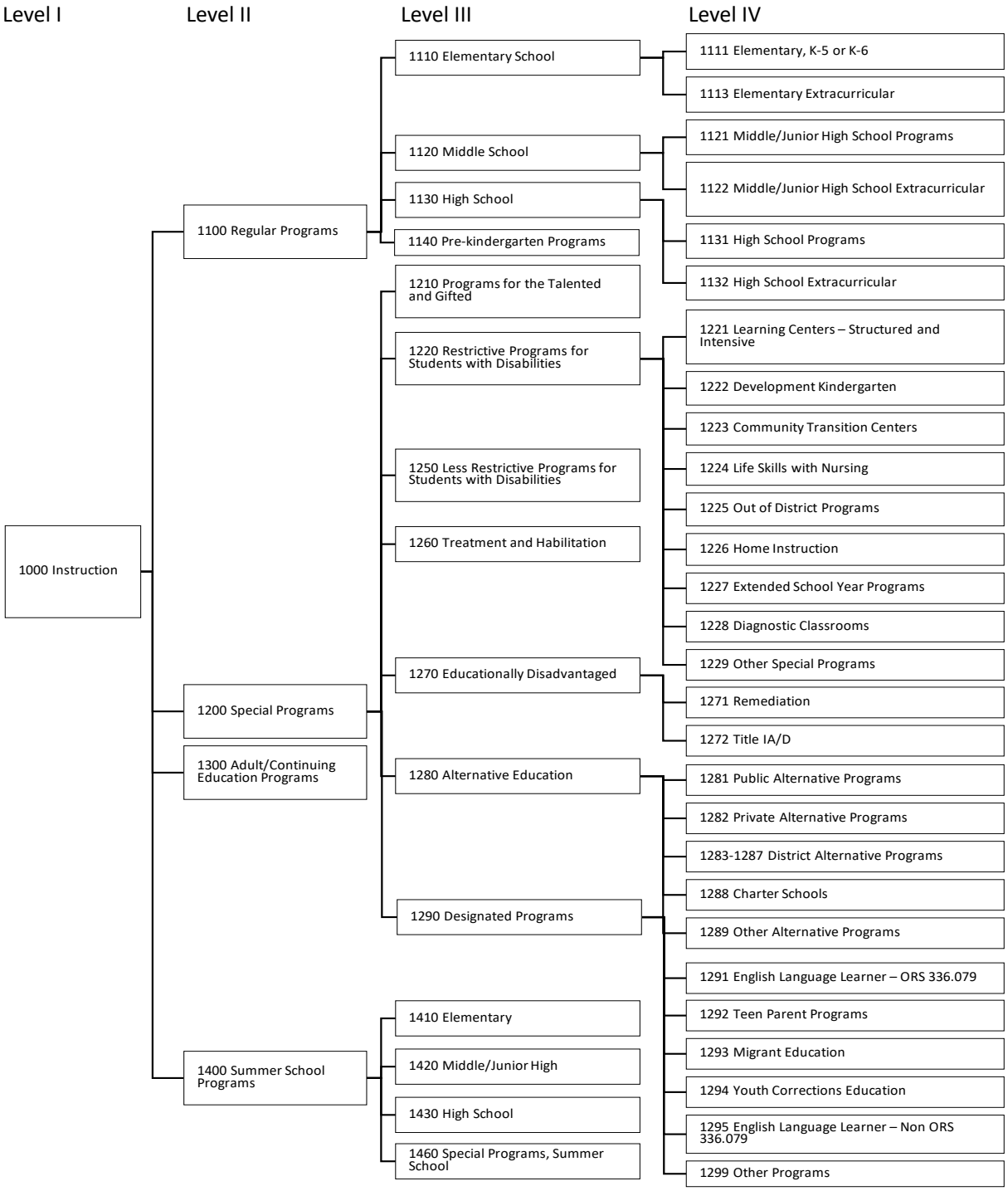
### *Oregon School Bond Manual*

Oregon School Boards Association
PO Box 1068
Salem, OR 97308
1-503-588-2800 or 1-800-578-6722

# Appendix D

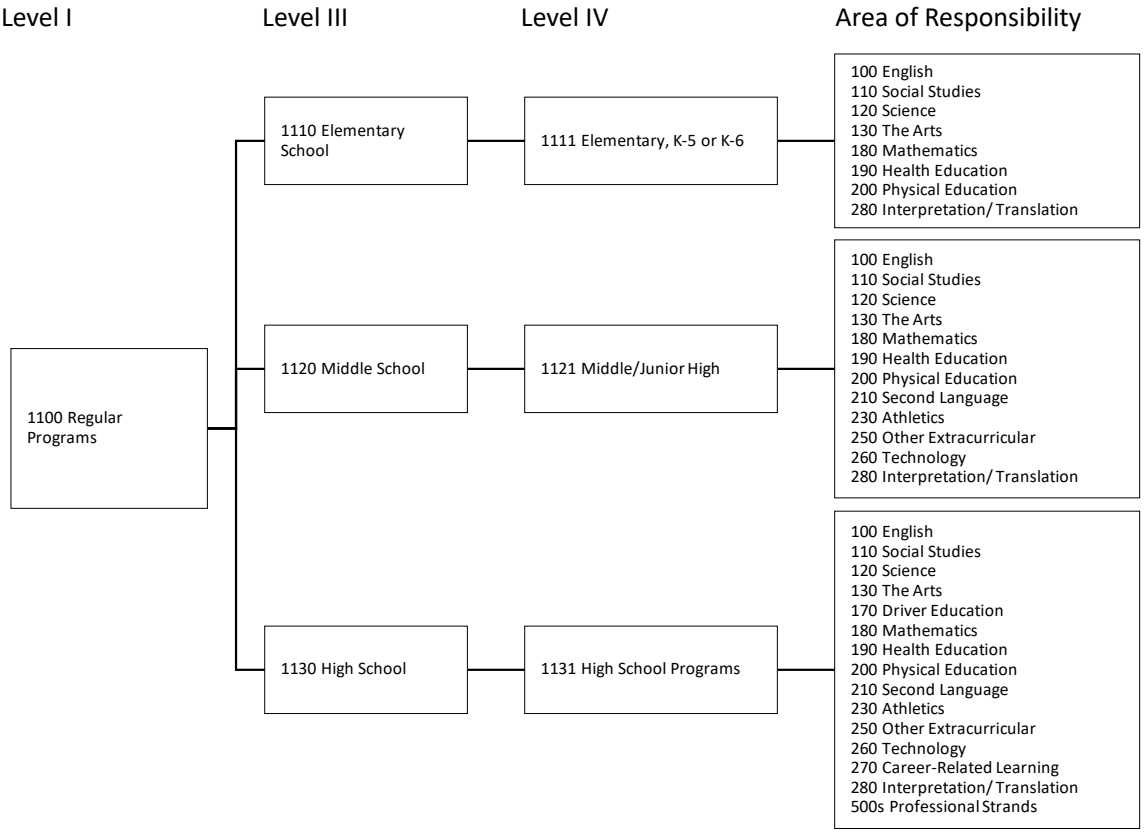
## Account Code Structure Charts

### FUNCTION CODES: INSTRUCTION SERVICES



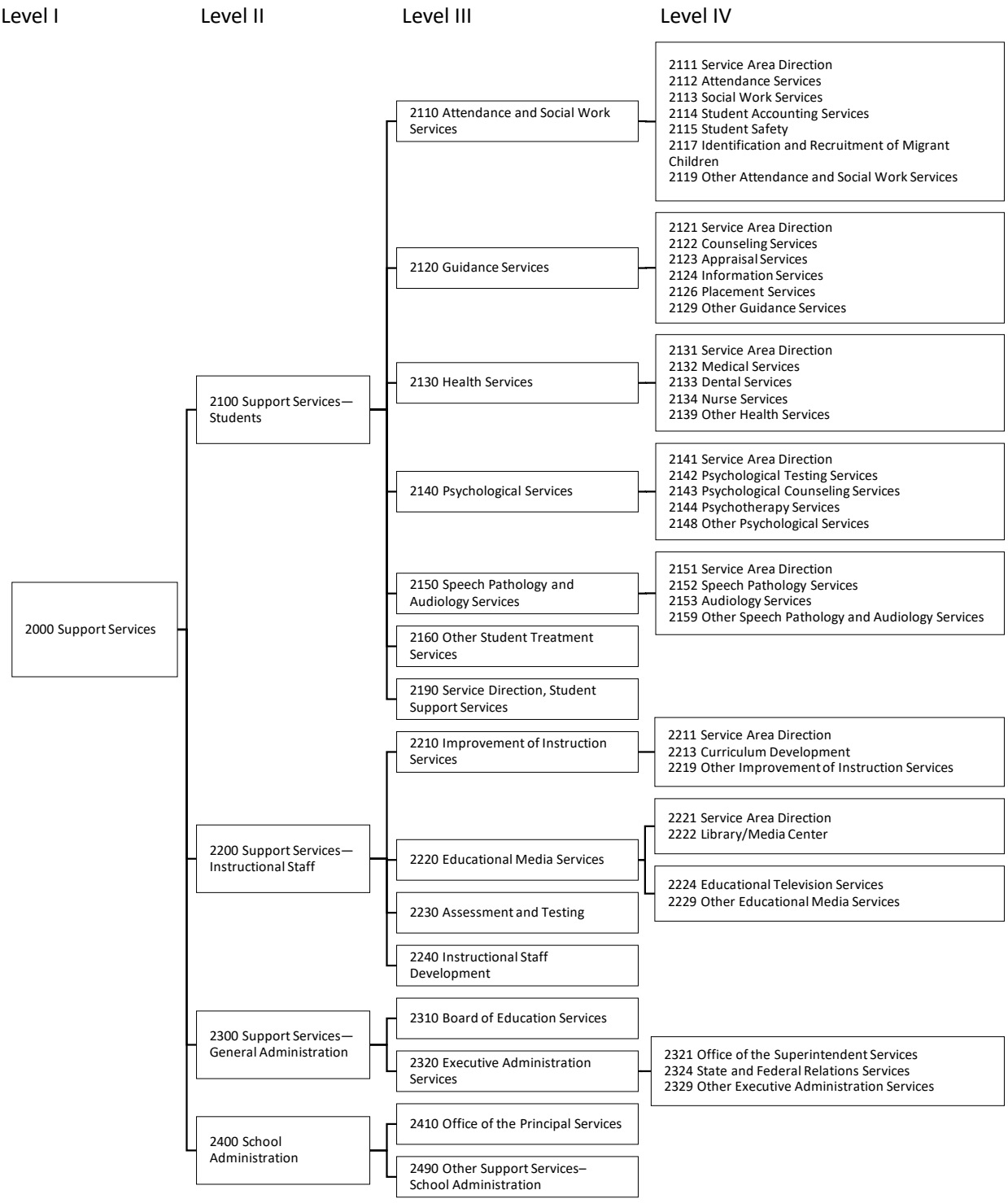
# Account code structure

## AREA OF RESPONSIBILITY CODES: INSTRUCTION SERVICES FUNCTION CODES



# Account Code Structure

## FUNCTION CODES: SUPPORT SERVICES



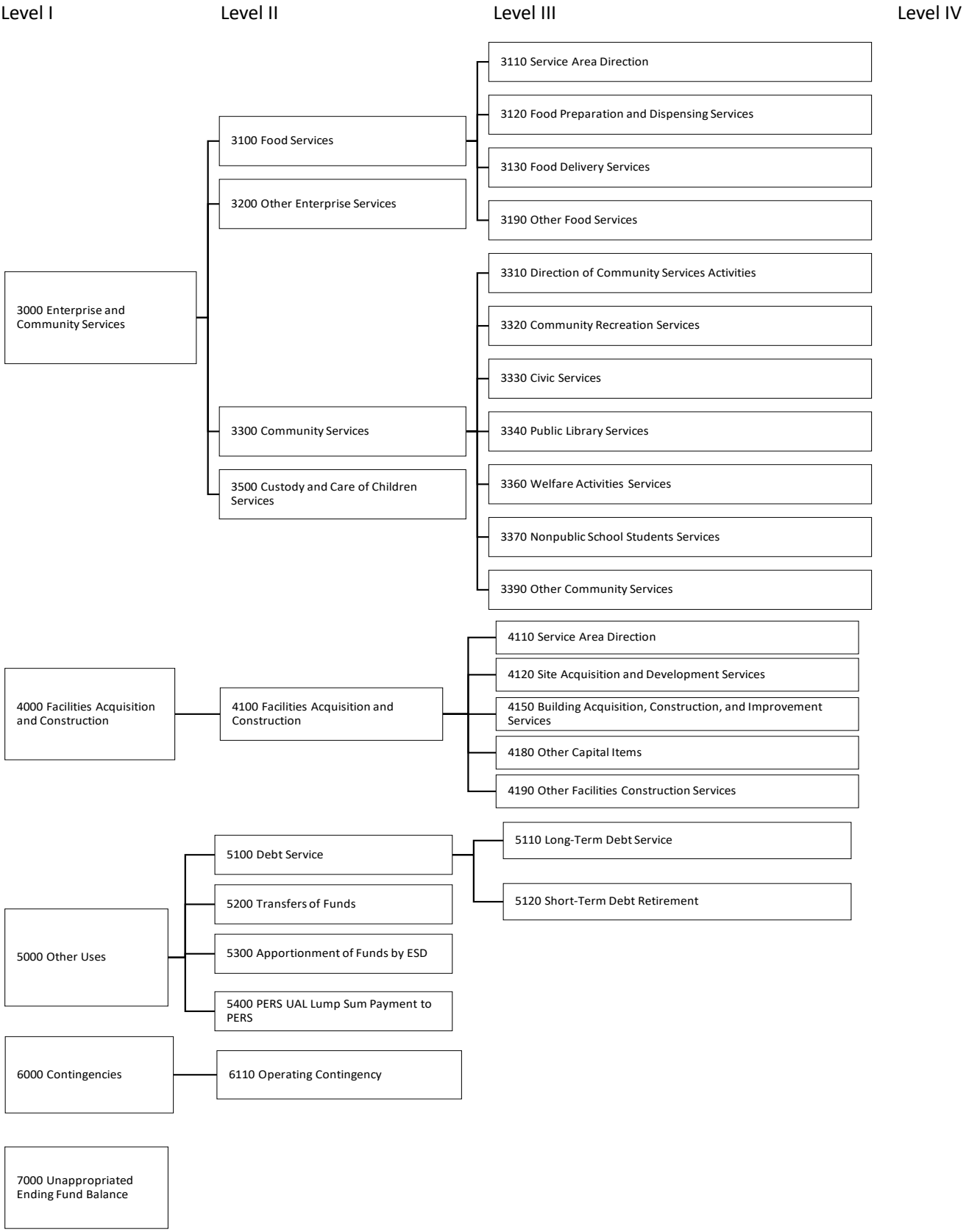
# Account Code Structure

## FUNCTION CODES: SUPPORT SERVICES (CONTINUED)



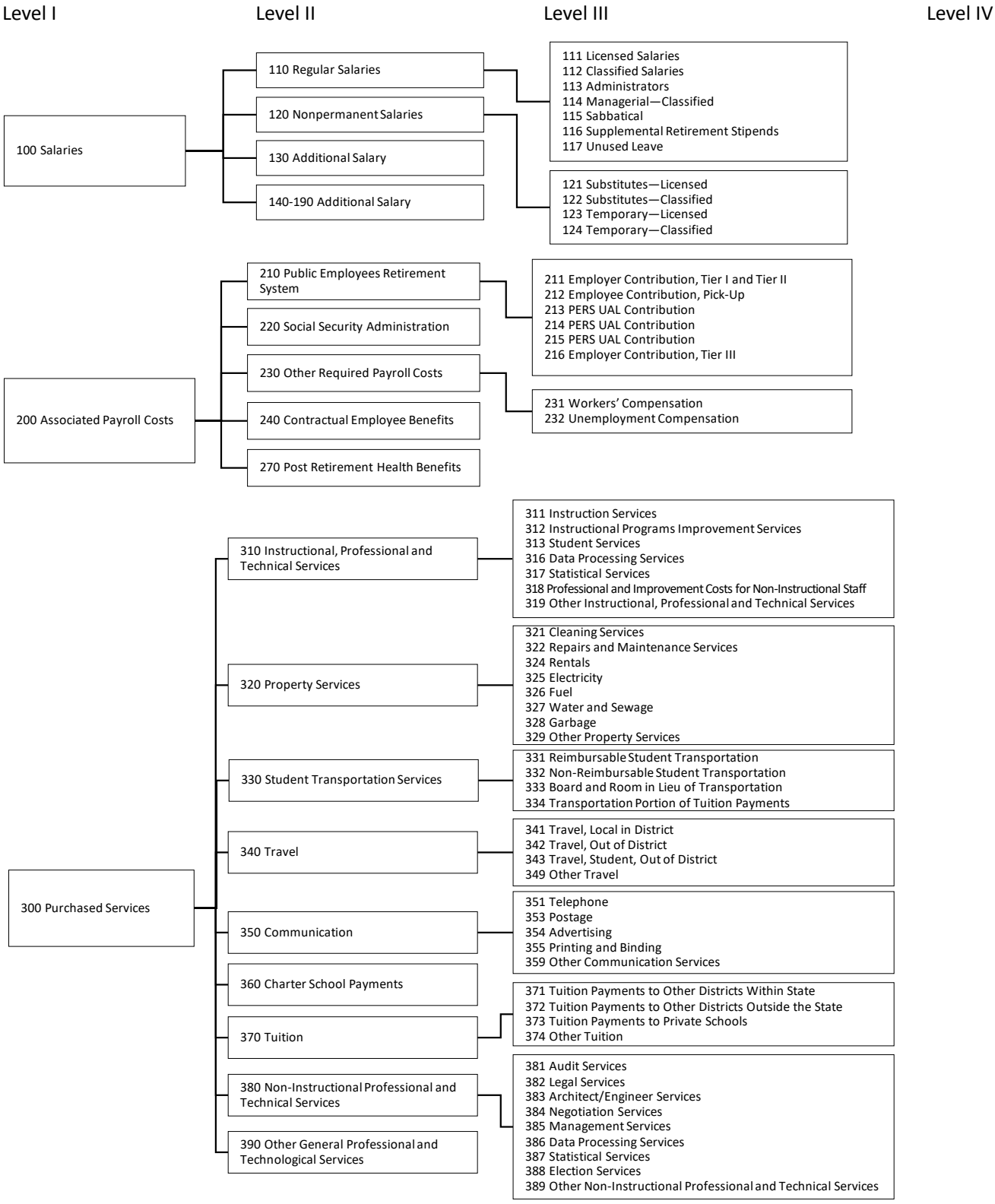
# Account Code Structure

## FUNCTION CODES



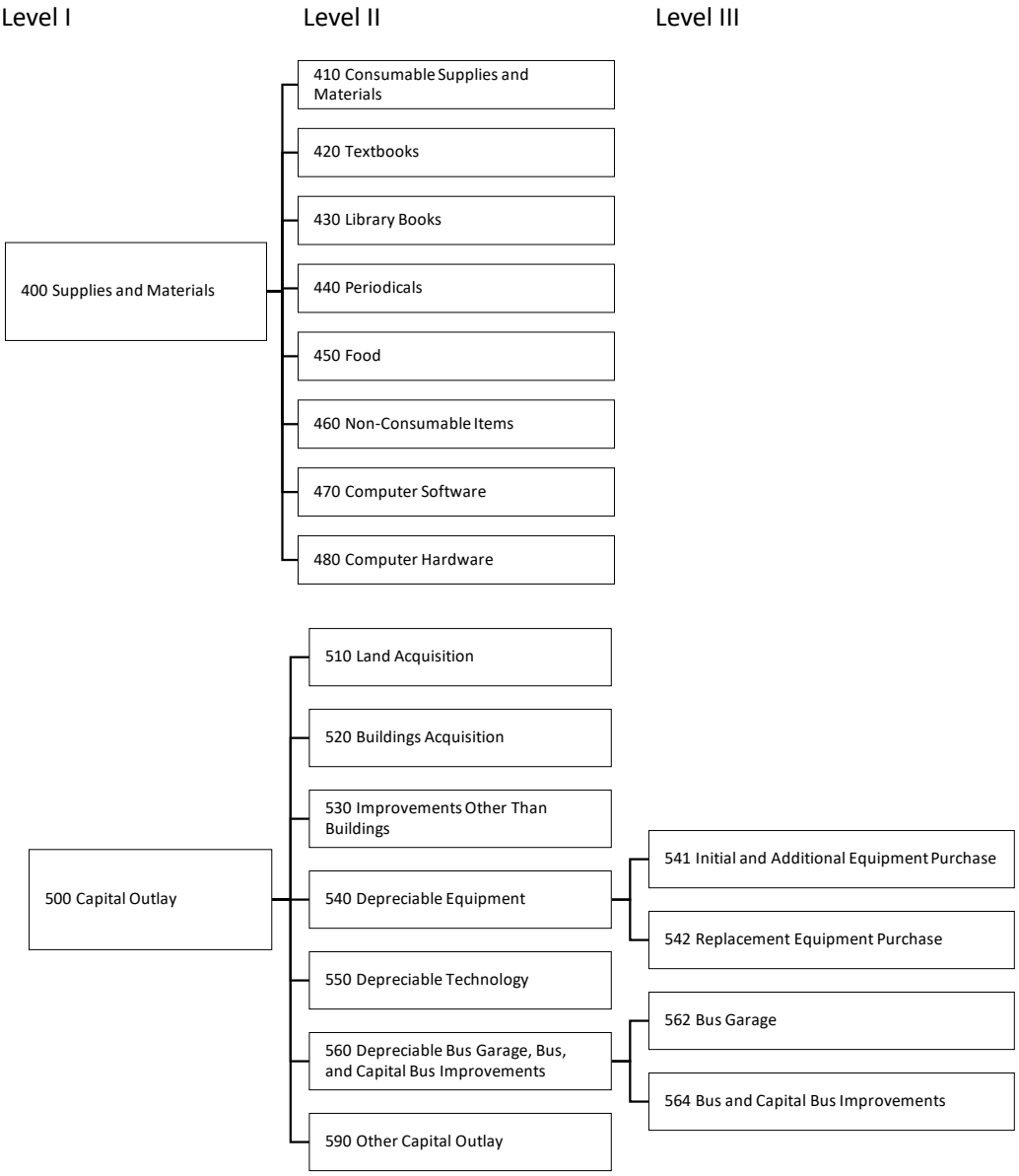
# Account Code Structure

## OBJECT CODES



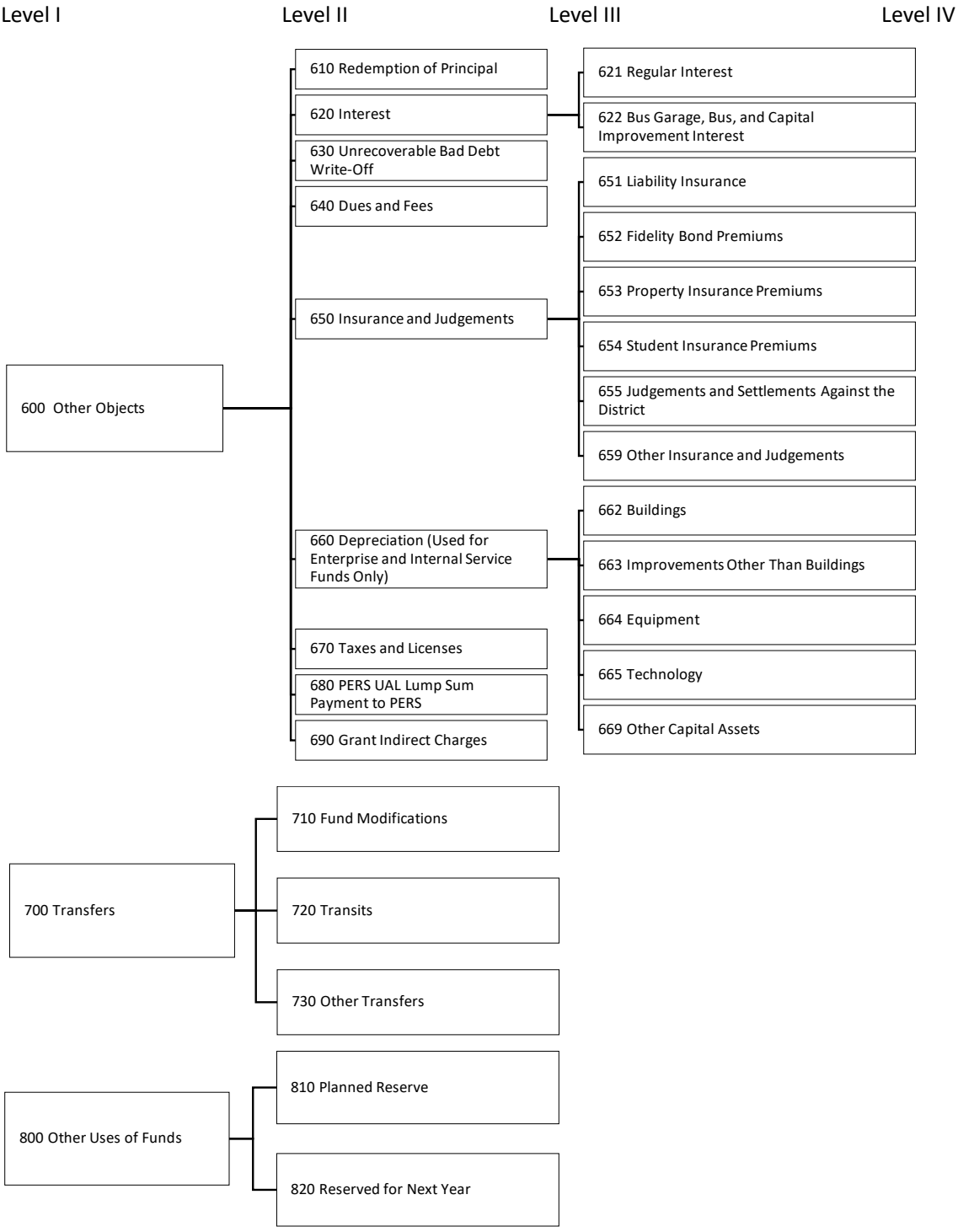
# Account Code Structure

## OBJECT CODES (CONTINUED)



# Account Code Structure

## OBJECT CODES (CONTINUED)



# Appendix E

## Guidelines for ELL and Non-ELL Related Expenditures

Language interpretation and translation services create access to education for students who are non-English speaking. To that end, this appendix provides additional information for the implementation of HB 3499.

HB 3499, enrolled during the 2015 legislative session, directed the Department of Education to convene an advisory group to develop uniform budget coding requirements and uniform reporting requirements to provide budget transparency for the spending of moneys received by school districts as provided by ORS 327.013 (1)(c)(A)(ii) for students in average daily membership eligible for and enrolled in an English Language Learner program under ORS 336.79. Appendix E was added to help provide guidance to assist in the tracking of ELL funds as required by law. The following provides frequently asked questions and answers for guidance on how to code different ELL and non-ELL related expenditures:

*"The obligation not to discriminate based on race, color, or national origin requires public schools to take affirmative steps to ensure that limited English proficient (LEP) students, now more commonly known as English Learner (EL) students or English Language Learners (ELLs), can meaningfully participate in educational programs and services, and to communicate information to LEP parents in a language they can understand."*

*-U.S. Office for Civil Rights*

The following provides **Frequently Asked Questions** and answers for guidance on how to code different ELL and non-ELL related expenditures:

1. Is the expenditure a direct instructional service with the intention of assisting an ELL student(s) in acquiring the English language, such as an ELL class?
   - If yes, use function 1291 English Language Learner (ELL) with object 319 Other Instructional, Professional and Technical Services.
2. Is the expenditure an intervention service for an ELL student to acquire the English language?
   - If yes, use function 1291 English Language Learner (ELL) with object 319 Other Instructional, Professional and Technical Services.
3. Is the expenditure for translation or interpretation services in support of an ELL student to acquire the English language?
   - If yes, use function 2680 Interpretation and Translation Services with object 319 Other Instructional, Professional and Technical Services and area of responsibility 280 English Language Learner Programs.
4. Is the interpretation and translation expenditure a support available to all students?
   - If yes, use function 2680 Interpretation and Translation Services with object 319 Other Instructional, Professional, and Technical Services. Do not use an area of responsibility.
5. If curriculum needs to be interpreted or translated in language other than English to learn mathematics, science, social studies, and other core classes, use your discretion to determine if the expense should be coded as an ELL expense. For example, textbooks are often already translated in different languages, so the expense of the textbook would not be reported as an ELL expense.

6. Is the expenditure for translation or interpretation services in support of a family or community member?
    - If yes, use function 2680 Interpretation and Translation Services with object 389 Other Non-instructional Professional and Technical Services. Do not use an area of responsibility.
7. Are you contracting bilingual staff and/or language interpreter services for: district and school-wide meetings (including parent and teacher conferences, curriculum nights, picnics, back-to-school nights, informational nights, college visits and any other relevant events), district and school-specific telephone communication and voicemail messages for families, principal/administrator and teacher hiring meetings, on-going meetings regarding a student's academic progress and behavior, special education referrals and/or special education evaluations, and any other related issues regarding a student's well-being?
    - If yes, use function 2680 Interpretation and Translation Services with object 319 Other Instructional, Professional, and Technical Services. Do not use an area of responsibility.
8. Are you contracting bilingual staff and/or translator services to provide for: family and community translation of important curricula and instructional materials, vital district and school-wide policies (may include, but are not limited to, enrollment, high school graduation, promotion, and retention), parent and student handbooks, forms (may include, but are not limited to, forms related to eligibility for services, enrollment, transportation, and school program/activity), newsletters, updates and notices (may include, but are not limited to, information on the school calendar and schedule, school emergencies, transportation schedule, bus stop changes, inclement weather, school closures and delayed starts, school boundary changes, important school policy changes, program changes, hiring of new staff and leaders, and cafeteria menus)?
    - If yes, use function 2680 Interpretation and Translation Services with object 389 Other Non-instructional Professional and Technical Services. Do not use an area of responsibility.

Following are **Oregon Revised Statutes** (ORS) that provide law for English Language Learner programs:

- ORS 327.006 - Definitions for State School Fund distributions
- ORS 327.013 – State School Fund distribution computations for school districts
- ORS 336.074 – Teaching in English required *exceptions
- ORS 336.079 – Special English courses for certain children
- ORS 336.081 – Opportunity to qualify to assist non-English speaking students
- ORS Chapter 336 – Conduct of Schools Generally

Following are Oregon Administrative Rules (OAR) that provide rules for English Language Learner programs:

- OAR 581-022-1210 – District Curriculum OAE 581-022-0405 – Career Education
- OAR 581-023-0100 – Eligibility Criteria for Student Weighting for Purposes of State

Following is a State resource that provides information on civil rights, legal requirements, expectations, and guidance around English Language Learner programs and services:

- Oregon's English Language Learner Program Guide

Following are Federal resources that provide information on civil rights, legal requirements, expectations, and guidance around English Language Learner programs and services:

1. U.S. Office for Civil Rights' Dear Colleague Letter for English Language Learners
2. U.S. Office of English Language Acquisition's English Learner Toolkit
3. U.S. Department of Education Policy Directive to Ensure Meaningful Access to Federally Conducted Services, Programs and Activities for Individuals with Limited English Proficiency
4. Policy Regarding the Treatment of National Origin Minority Students Who Are Limited English Proficient

# Appendix F

## Guidelines for Coding Technology: Object Code 400 – Supplies and Materials

### 410 CONSUMABLE:

**Definition:** Expenditures for all supplies for the operation of a district, including freight and cartage. If such supplies are handled for resale to students, only the net cost of supplies is recorded here. (Note: object 411 through 419 are available for further identifying supplies for management purposes at the option of the district.)

**Note:** Computer technology items of an approximate value of less than $250 and computer peripherals, such as thumb drives, keyboards, mice, miscellaneous cords and cables, projector bulbs, and other smaller plug-n-play devices should be included here.

### 460 NON-CONSUMABLE ITEMS:

**Definition:** Expenditures for equipment with a current value of less than $5,000 or for items which are "equipment-like," but which fail one or more of the tests for classification as object 541 Initial and Additional Equipment Purchase or 542 Replacement Equipment Purchase (see object 540 Depreciable Equipment definition). Examples might include handheld calculators, stacking chairs, etc. This object category could be used when a district desired to treat these items as equipment for budgeting, physical control, etc., without either violating the state dollar threshold for capital equipment or combining these items with consumable supplies (see object 410 Consumable Supplies and Materials, including 411–419).

**Note:** Examples would include tables, whiteboards, bookcases, and chairs.

### 470 COMPUTER SOFTWARE.

**Definition:** Expenditures for published computer software. Include licensure and usage fees for software here. The Cloud is considered software and would be coded here.

**Note:** iTunes software and other mobile device apps apply as well.

### 480 COMPUTER HARDWARE

**Definition:** Expenditures for non-capital computer hardware, generally of value not meeting the capital expenditure criterion. An iPad or e-reader needed to access e-textbooks is considered hardware and would be coded here.

**Note:** The capital expenditure criteria for objects is for items over $5,000 (see object 550 Depreciable Technology). Rule of thumb is for items approximate to $250 or more to be coded here. This includes computer items of major value, such as: Mac's, PC's, monitors, printers, mobile devices (e.g., iPads and Chromebooks), major internal hardware items, and computer setups purchased as a bundle.

| **410: Consumables** | **460: Non-Consumables** | **470: Software** | **480: Hardware** |
|---|---|---|---|
| Apple TVs accessories | Bookcases | iTunes | eBook Readers |
| Cords & Cables | Chairs | Microsoft Office | iPads/Mac Computers |
| Chromecasts accessories | Handheld calculators | Mobile Apps | Major Internal Hardware |
| Keyboards & Mice | Tables | Cloud | Hardware/Monitors |
| Peripherals | | | PC Computers |
| Projector Bulbs | | | Printers/Projectors |

# Appendix G

## Recommended Guidelines for New-Program Accounting

This guidance is for new programs where there may be eventual interest to report and understand how the grant funds were spent and a financial data collection is not yet established. For example, the legislature may want to know how much money was spent on salaries and benefits, supplies, services, etc., for the High School Success program (Measure 98). Or the total cost per school for participation in the Outdoor School program (Measure 99).

The recommendation for coding new programs is to establish a specific fund at the district level. This may reduce the potential for ambiguity in the reporting of data.

Another advantage of creating a new district-level fund is the capability to use existing codes whereby, if needed, the data can be easily disaggregated. For example, districts will not necessarily need to make a choice between coding each new program to a new area of responsibility over coding to existing area codes, such as 320 Special Education, which is used for maintenance of effort (MOE) review for special education programs.

Example for coding new programs, such as M98 and M99 Grants:

**FUND:**

Create a new fund in either the 100 General Fund or 200 Special Revenue Fund

**REVENUE:**

Source – 3299 Other Restricted Grants- in-aid

**EXPENDITURES:**

Function – code to program

Object – code to service or commodity

Operational Unit – code to building level

Area of Responsibility – code to curriculum area as required by function

# Appendix H

## EVERY STUDENT SUCCEEDS ACT (ESSA)

Federal guidance for ESSA reporting is as follows:

> ***"The per-pupil expenditures of Federal, State, and local funds, including actual personnel expenditures and actual non-personnel expenditures of Federal, State, and local funds, disaggregated by source of funds, for each local educational agency and each school in the State for the preceding fiscal year."***

The challenge is to identify which expenditures can be reported by per-pupil spending. Based on preliminary analysis of financial data from 2015-16, we have been able to identify expenditures currently reported at district and school levels. This information allows each district the opportunity for review to determine their standing with ESSA reporting.

The following charts identify recommended district or school level reporting. With these recommendations, we leave the final discretion for reporting to the school district.

### #1 – FUNCTIONS

| Function | Function Description | Category |
|---|---|---|
| 1111 | Primary (K-3) | School |
| 1113 | Elementary Extracurricular | School |
| 1121 | Middle/Junior High Programs | School |
| 1122 | Middle/Junior High School Extracurricular | School |
| 1131 | High School Programs | School |
| 1132 | High School Extracurricular | School |
| 1140 | Pre-kindergarten Programs | School |
| 1210 | Programs for the Talented and Gifted | School |
| 1220 | Restrictive Programs for Students with Disabilities | School |
| 1250 | Less Restrictive Programs for Students with Disabilities | School |
| 1260 | Early Intervention | District |
| 1271 | Remediation | School |
| 1272 | Title I | School |
| 1280 | Alternative Education | School |
| 1291 | English Language Learner Programs | School |
| 1292 | Teen Parent Programs | School |
| 1293 | Migrant Education | District |
| 1294 | Youth Corrections Education | School |
| 1299 | Other Programs | School |
| 1300 | Adult/Continuing Education Programs | District |
| 1400 | Summer School Programs | District |
| 2110 | Attendance and Social Work Services | School |

| Function | Function Description | Category |
|---|---|---|
| 2120 | Guidance Services | School |
| 2130 | Health Services | School |
| 2140 | Psychological Services | District |
| 2150 | Speech Pathology and Audiology Services | District |
| 2160 | Other Student Treatment Services | District |
| 2190 | Service Direction: Student Support Services | District |
| 2210 | Improvement of Instruction Services | School |
| 2220 | Educational Media Services | School |
| 2230 | Assessment and Testing | School |
| 2240 | Instructional Staff Development | School |
| 2310 | Board of Education Services | District |
| 2320 | Executive Administration Services | District |
| 2410 | Office of the Principal Services | School |
| 2490 | Other Support Services-School Administration | District |
| 2510 | Direction of Business Support Services | District |
| 2520 | Fiscal Services | District |
| 2540 | Operation and Maintenance of Plant Services | School |
| 2550 | Student Transportation Services | District |
| 2560 | Alternative Transportation (2023 HB 3014) | District |
| 2570 | Internal Services | School |
| 2610 | Direction of Central Support Services | District |
| 2620 | Planning, Research, Development, Evaluation Services | District |
| 2630 | Information Services | District |
| 2640 | Staff Services | District |
| 2660 | Technology Services | School |
| 2670 | Records Management Services | District |
| 2690 | Other Support Services - Central | District |
| 2700 | Supplemental Retirement Program | District |
| 3100 | Food Services | School |
| 3200 | Other Enterprise Services | District |
| 3300 | Community Services | School |
| 3500 | Custody and Care of Children Services | School |
| 4110 | Service Area Direction | District |
| 4120 | Site Acquisition and Development Services | School |
| 4150 | Building Acquisition, Construction, Improvement Services | School |
| 4190 | Other Facilities Construction Services | District |
| 5100 | Debt Service | District |
| 5200 | Transfers of Funds | District |
| 5300 | Apportionment of Funds by ESD | District |

## #2 – OBJECTS

| Objects | Object Description | Category |
|---|---|---|
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|---|---|---|
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# *SECTION I -Board Overview*

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## The Mission, Vision, and Values of Oregon State Board of Education

The Mission, Vision, and Values of the State Board of Education are developed and regularly reviewed by the Board itself. They are shared with individuals preparing items to come before the Board and are used to guide Board members in the decisions that they make.

### Mission

The Oregon State Board of Education works on providing equitable policies and practices that lead to the educational and life success of every Oregon public school student.

### Vision

An aspirational public education system that honors its increasingly diverse student body and affirms every student to reach their full potential in a rapidly shifting global environment.

### Values

The Oregon State Board of Education dedicates itself to centering **diversity**, **equity**, and **inclusion** in the work, decisions, and actions that we take, in the service of every student in the state, their academic advancement and their lifelong success.

The Oregon State Board of Education dedicates itself to challenging the status quo and rendering an **innovative**, **creative**, **adaptable**, and **culturally responsive** curriculum that reflects the history and evolving demographics of our state's landscape. We value and commit to an equally dignified, holistic, and inclusive student experience.

The Oregon State Board of Education dedicates itself to sharing responsibility, aiming for every student's individual academic excellence, and providing life skills that allow students to develop **self-agency**. We value engaging historically excluded **community voices** and student experience. We value and distinguish the **sovereignty of tribal nations** and the responsibility to engage in consultation on key matters of policy.

The Oregon State Board of Education dedicates itself to conducting business with **integrity**, **transparency**, and **adaptability** as the basis for equitable student access and success in public education.

## POLICY #100 - Board Operational Policy and Procedures

The Board shall operate under its policies and procedures as directed by law and as adopted by the Board. These policies and procedures may be adopted, amended, or repealed by a majority of the Board. No amendment shall be contrary to the laws of Oregon.

The policies and procedures  may be amended at any meeting upon giving the members of the Board ten (10) days advance notice of such proposed amendments, and upon an affirmative vote of a majority of the directors. Punctuation, grammar, and typographical errors may be corrected by board staff without a vote of the Board.

The Board shall regularly review its operational policies and procedures, as stated in Procedure #415P of this Manual.

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Legal/Statutory References:

None cited.

Board Policy & Procedure Cross References:

Procedure #415P

## POLICY #101 - Board Code of Ethics

Board members are public officials under state law. Public office is a public trust, and as one safeguard of that trust, the people require all public officials to adhere to the code of ethics set forth in ORS 244.040. Board members should not make private promises that are binding upon the duties of a Board member, because a Board member has no private word that can be binding on public duty (ORS 244.010 - ORS 2.44.020). Board members should familiarize themselves with Oregon's ethics laws; this policy highlights some key features but is not comprehensive. In the event of any conflict between this policy and Oregon ethics laws, the law supersedes the policy.

Members found to be in violation of the Board's Code of Ethics and the State's ethics laws are subject to Policy #418 and Procedure #418P, as described in Section IV of this Manual.

**101.1 - Financial Gain**

No Board member may use, or attempt to use, their official position or office to obtain financial gain or avoidance of financial detriment for the Board member, a relative or household member of the Board member, or any business with which the Board member or a relative, or member of the household of the Board member is associated, if the financial gain or avoidance of financial detriment would not otherwise be available but for the member's holding of the official position. Permitted is official salary, honoraria, (except as prohibited below), reimbursement of expenses or an unsolicited award for professional achievement for the Board member, the Board member's relative, or for a household member of the Board member (ORS 244.040).

A Board member may not solicit or receive, whether directly or indirectly, honoraria for themself or for any member of their household with a value of $50 or more if the honoraria is solicited or received in connection with the official duties of the Board member. Honoraria does not include a certificate, plaque, commemorative token or other item with a value of $50 or less, or honoraria for services performed in relation to the private profession, occupation, avocation or expertise of the Board member. Any person that provides a Board member or household member of the Board member with an honorarium as allowed under ORS 244.042 with a value of $15 shall notify the member in writing of the value of the item within ten days after the event for which the item was received (ORS 244.042, ORS 244.100).

No Board member may solicit or receive, either directly or indirectly, and no person shall offer or give to any Board member any pledge or promise of future employment, based on any understanding that such board member's vote, official action or judgment would be influenced by such a pledge or promise (ORS 244.040).

No Board member or former Board member may attempt to further or further the personal gain of the Board member through the use of confidential information gained in the course of or by reason of the official position or activities of the Board member in any way (ORS 244.040).

No Board member may attempt to represent or represent a client for a fee before the State Board of Education. This subsection does not apply to the person's employer, business partner or other associate (ORS 244.040).

**101.2 - Gifts**

No person shall offer during any calendar year any gifts with an aggregate value in excess of $50 from any single source to any Board member or their relative or household member, if the person offering the gift could reasonably be known to have a legislative or administrative interest in the Oregon Department of Education (ORS 244.025).

No Board member, their relative, or household member shall solicit or receive, whether directly or indirectly, during any calendar year, any gift or gifts with an aggregate value in excess of $50 from any single source who could reasonably be known to have a legislative or administrative interest in the Board member. "Legislative or administrative interest" means an economic interest, distinct from that of the general public in any matter subject to the decision or vote of the Board member acting in the Board member's capacity as a public official. (ORS 244.020, ORS 244.025).

Gifts do not mean:

(a) Gifts from relatives or members of the Board member's household.

(b) Unsolicited tokens of appreciation with a resale value of less than $25.

(c) Informational material, publications, or subscriptions related to the performance of the board member's public duties.

(d) Admission/cost of food consumed by a Board member, or a member of the household when accompanying the Board member at a reception, meal, or meeting held by an organization when the Board member represents state government.

(e) Reasonable expenses paid by any local, state, or federal government; a state or nationally recognized Native American tribe; a membership organization to which a public body pays membership dues; or a not-for-profit corporation for attendance at a convention, fact-finding mission or trip, or other meeting if the public official is scheduled to deliver a speech, make a presentation, participate on a panel or represent state government.

Any organization, unit of government, tribe, or corporation that provides a board member with expenses with an aggregate value exceeding $50 for an event (convention, trip, and certain meetings) shall notify the Board member in writing of the amount of the expense. The notice shall be sent to the Board member within 10 days from the date such expenses are incurred (ORS 244.100).

(f) Reasonable food, travel, or lodging expenses provided to a public official, or a relative/household member/staff member of the board member accompanying the board member when the board member is representing state government.

(g) Food or beverage consumed while the Board member is acting in an official capacity.

(h) Food or beverage consumed by a Board member at a reception where the food or beverage is provided as an incidental part of the reception and no cost is placed on the food or beverage.

(i) Entertainment provided to a Board member/relative/member of the household that is incidental to the main purpose of another event.

(j) Entertainment provided to a Board member/relative/member of the household where the Board member is acting in an official capacity while representing state government.

(k) Anything of economic value that is part of the usual and customary practice of the person's private business, employment, or volunteer activities and bears no relationship to the board member's official position.

**101. 3 - Conflicts of Interest**

An "actual conflict of interest," means any action or any decision or recommendation by a person acting in a capacity as a public official, the effect of which would be to the private pecuniary benefit or detriment of the person or the person's relative or any business with which the person or a relative of the person is associated (ORS 244.020).

A potential conflict of interest means any action or any decision or recommendation by a person acting in a capacity as a public official, the effect of which could be to the private pecuniary benefit or detriment of the person or the person's relative, or a business with which the person or the person's relative is associated, unless the pecuniary benefit or detriment arises out of the following:

(a) An interest or membership in a particular business, industry, occupation or other class required by law as a prerequisite to the holding by the person of the office or position.

(b) Any action in the person's official capacity which would affect to the same degree a class consisting of all inhabitants of the state, or a smaller class consisting of an industry, occupation or other group, including one of which or in which the person, or the person's relative or business with which the person or the person's relative is associated, is a member or is engaged.

(c) Membership in or membership on the board of directors of a nonprofit corporation that is tax-exempt under section 501(c) of the Internal Revenue Code.

When confronted with a **potential** conflict of interest, a Board member shall:

- Announce publicly the nature of the potential conflict prior to taking any action thereon in the capacity of a public official.

When confronted with an **actual** conflict of interest, a Board member shall:

- Announce publicly the nature of the actual conflict.
- Refrain from participating as a public official in any discussion or debate on the issue out of which the actual conflict arises or from voting on the issue, unless the member's vote is necessary to meet the quorum requirement.
- Notify in writing the Governor of the nature of the conflict and request that the Governor dispose of the matter giving rise to the conflict. Upon receipt of the request, the Governor shall designate, within a reasonable time, an alternate to dispose of the matter or shall direct the official to dispose of the matter in a manner specified by the Governor (ORS 244.120).

Conflicts and potential conflicts and their disposition shall be recorded in the minutes and may be reported to the Oregon Government Ethics Commission at the discretion of the Board (ORS 244.130).

The Oregon Government Ethics Commission may impose civil penalties not to exceed $5,000 for violating any provision of this chapter or any resolution adopted under ORS chapter 244 (ORS 244.350). Board members who have financially benefited by a conflict of interest may be required to forfeit twice the amount of the gain realized (ORS 244.360).

**101.4 - Bribery**

A person commits the crime of bribe-giving if the person offers, confers or agrees to confer any pecuniary benefit upon a public servant with the intent to influence the public servant's vote, opinion, judgment, action, decision or exercise of discretion in an official capacity. (ORS 162.015). Bribe giving is a Class B felony, punishable with up to 10 years in jail and a $250,000 fine (ORS 161.625, ORS 161.605).

A public servant commits the crime of bribe-receiving if the public servant: (a) solicits any pecuniary benefit with the intent that the vote, opinion, judgment, action, decision or exercise of discretion as a public servant will thereby be influenced; or (b) accepts or agrees to accept any pecuniary benefit upon an agreement or understanding that the vote, opinion, judgment, action, decision or exercise of discretion as a public servant will thereby be influenced (ORS 162.025). Bribe receiving is a Class B felony punishable with up to 10 years in jail and a $250,000 fine (ORS 161.625, ORS 161.605).

**101.5 - Official Misconduct**

A Board member commits the crime of official misconduct in the second degree if the person knowingly violates any statute relating to the office of the person (ORS 162.405). Official misconduct in the second degree is a Class C misdemeanor, punishable with up to 30 days in jail and a $1,250 fine (ORS 161.615, ORS 161.635).

A Board member commits the crime of official misconduct in the first degree if with intent to obtain a benefit or to harm another: (a) the public servant knowingly fails to perform a duty imposed upon the public servant by law or one clearly inherent in the nature of office; or (b) the public servant knowingly performs an act constituting an unauthorized exercise in official duties (ORS 162.415). Official misconduct in the first degree is a Class A misdemeanor, punishable with up to one year in jail or a $6250 fine (ORS 161.635, ORS 161.615).

**101.6 - Economic Interest Form**

Board members are required to file with the Oregon Government Ethics Commission a verified statement of economic interest by April 15 of each year (ORS 244.050). The statement of economic interest filed under ORS 244.050, shall be on a form prescribed by the Oregon Government Ethics Commission (ORS 244.060). Failure to file the statement may result in a civil penalty (ORS 244.050, ORS 244.060).

The Oregon Government Ethics Commission shall notify the Board member if it has not received the statement within five days of its due date and give the Board member no fewer than 15 days to comply prior to imposing a penalty. Failure to file the statement may result in the commission imposing a fine of $10 for each of the 14 days the statement is late and $50 for each day thereafter (ORS 244.350).

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Legal/Statutory References

ORS 244.010 - ORS 2.44.020
ORS 244.040
ORS 244.020
ORS 244.025
ORS 244.100
ORS 244.120
ORS 244.130
ORS 244.350
ORS 161.625
ORS 161.635
ORS 162.415
ORS 244.060
ORS 162.015
ORS 161.605
ORS 162.405

Board Policy & Procedure Cross References

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Policy #418
Procedure #418P

# *SECTION II - Board Meeting Governance*

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# POLICY #200 - Compliance with Public Meeting Law

The State Board of Education is a Governing Body, and shall comply with all relevant provisions of ORS chapter 192 - Records; Public Reports and Meetings. Any subcommittees, task forces, or work groups that are charged with making recommendations as a whole to the Board shall similarly comply with the provisions of chapter 192[1].

A "meeting" means the convening of a governing body of a public body for which a quorum is required in order to make a decision or to deliberate toward a decision on any matter. A convening is defined as:

1. Gathering in a physical location;
2. Using electronic, video or telephonic technology to be able to communicate contemporaneously among participants;
3. Using serial electronic written communication among participants; or
4. Using an intermediary to communicate among participants (192.610).

All meetings of the State Board of Education shall be open to the public and all persons shall be permitted to attend any meeting, except as otherwise provided by law (ORS 192.630).

A meeting that is held virtually, or in rare cases through the use of telephone or other electronic communication shall:

1. Include at least one place where, or at least one electronic means by which, the public can listen to the communication at the time it occurs. A place provided may be a place where no member of the governing body of the public body is present.
2. Provide, to the extent reasonably possible, an opportunity for the public to:
    a. Access and attend the meeting by telephone, video or other electronic or virtual means;
    b. Submit during the meeting oral testimony by telephone, video or other electronic or virtual means when allowed, as convened in POLICY #300; and
    c. Submit written testimony, including by electronic mail or other electronic means, when allowed as convened in POLICY #300, so that the governing body is able to consider the submitted testimony in a timely manner (ORS 192.670).

**200.1 - Penalties**

1. Any decision made in violation of the public meetings law is voidable. A decision shall not be voided if the State Board of Education reinstates the decision while in compliance with public meetings law. A decision that is reinstated is effective from the date of its initial adoption (ORS 192.680).
2. The Oregon Government Ethics Commission may impose civil penalties not to exceed $5,000 for violating any provision of law pertaining. However, a civil penalty may not be

[1] A body that has authority to make recommendations to a public body on policy or administration is a governing body (ORS 192.610(3); *Attorney General's Public Records and Meetings* Manual, 2005, p. 110-111. Subcommittees, task forces, and work groups that are charged with making recommendations as a whole, to the board, are subject to the public meetings law.

imposed under this subsection if the violation occurred as a result of the State Board of Education acting upon the advice of the public body's counsel (ORS 244.350).

## POLICY #201 - Regular Meetings

To begin the annual cycle, the Board will hold an organizational retreat for strategic planning, review of Board Priorities, training on requested Board business topics, general orientation of ODE processes, and for optimal Board Director integration to the business of the Board.

The State Board of Education shall meet at least 6 times each year on dates determined by the Board, and at such other times as may be designated by the chairperson and agreeable to a majority of the Board, or at the call of a majority of the Board members (ORS 326.041).

The State Board shall approve a Board calendar annually, which shall include the intended meeting dates for the subsequent year. With Board approval, meeting dates may be shifted depending on need. Reasonable notice of changes must be provided to the public.

The purpose of each regular monthly meeting will be to conduct the regular Board business as stated in SECTION IV of this manual.

### 201.1 - Meeting Agendas

The Board Chair, working with the SBE Leadership Team, Board Administrator, and the ODE Director, will prepare an official agenda for Board meetings. The agenda will be posted to the Board's website and distributed to interested parties approximately one week before each meeting. Any Board member may request that the Chair add or remove an item from the agenda. In the event the Board Chair refuses to do so, a Board member may compel the Board Chair via a formal motion and the approval of a majority of the Board.

The agenda with supporting detail will be provided to each Board member, ex-officio member, and advisor approximately one week prior to the Board meeting. All Board documents, to the greatest extent possible, will be posted on the State Board of Education's website.

### 201.2 - Use of the Consent Agenda

The Consent Agenda is a tool available for the Board to adopt, or otherwise approve, without further discussion, a group of items with a single motion. While crafting an agenda, the Board Chair may place items on the Consent Agenda that are reasonably thought not to generate additional discussion by the Board. This includes, but is not limited to, items that have already been presented to and discussed by the Board, as well as actions that have been taken by the ODE Director that require Board approval. Any Board member may request that the Board Chair remove an item from the Consent Agenda and instead hold space for discussion at a particular meeting. In the event the Board Chair refuses to do so, a Board member may compel the Chair via a formal motion and the approval of a majority of the Board.

# PROCEDURE #201P - Public Meeting Procedures

In order to remain in compliance with Public Meeting Law and conduct the business of the board as effectively as possible, the Board will observe the following procedures during public and as applicable during executive sessions:

**201P.1 - Accessibility Procedure**

The State Board of Education will conduct all meetings in accordance with state law and will be accessible to persons with disabilities. A request for an interpreter for the hearing impaired or for other accommodations should be made at least 48 hours prior to the meeting.

**201P.2 - Notice Requirement Procedures**

The members of the Board will be given at least 10 days' notice, in writing, of the date and place of each regular or special meeting (ORS 182.020).

The Board shall give public notice, reasonably calculated to give actual notice to interested persons including news media who have requested notice, of the time and place for holding of its meetings, including its committees and work groups. The notice shall also include a list of the principal subjects anticipated to be considered at the meeting. This requirement shall not limit the ability of the Board to consider additional subjects (ORS 192.640).

**201P.3 - Special Meetings Notice Requirements**

In the event that a special meeting is required, the Board shall provide at least 24 hours' notice to the members of the Board, the news media which have requested notice, and the general public. In case of an actual emergency, a meeting may be held upon such notice as is appropriate to the circumstances, but the minutes for such a meeting shall describe the emergency justifying less than 24 hours' notice.

**201P.4 - Parliamentary Procedure**

Except where otherwise noted, the Board will be guided by Robert's Rules of Order, most recent edition. The Board Administrator will serve as parliamentarian.

**201P.5 - Quorum Requirements**

A quorum of the nine-member State Board of Education is five members. Absent a quorum, the Board may meet for the purposes of gathering information, but no formal action may be taken.

A quorum of the Board may not meet in private for the purpose of deciding on or deliberating toward a decision on any matter, except as otherwise provided by law (ORS 192.630).

**201P.6 - Voting**

All voting Board members are expected to participate in voting unless a conflict of interest exists. If a conflict of interest arises, a member will need to excuse themselves from any votes or discussion. A conflict of interest is when an official action by the public official could or would result in a financial benefit or detriment to the public official, a relative of the public official or a business with which either is associated (ORS 244.020).

For a motion to be adopted, a majority of the Board must vote in favor of the motion (ORS 174.130). The word "majority" in this context means more than half. Votes may be taken either by individually calling member names, by a group voice vote, or by "unanimous consent." The Chair may say, "If there is no objection . . ." If an objection is lodged, a roll call vote must then be taken. Following the vote, the Chair will announce the vote and whether the motion has failed or passed. All votes must be recorded in the minutes indicating how each member voted.

When a potential conflict of interest exists, the member will announce that conflict and be allowed to vote. When an actual conflict exists, the member will announce the conflict and refrain from participating in the debate or vote unless necessary for a quorum (ORS 244.120). The conflict will be recorded in the minutes (ORS 244.130).

A vote by proxy is a vote cast by a substitute on behalf of a member who is not present at the meeting. Proxy voting is not authorized since no member of the Board is empowered to delegate their vote to another[2].

Members of the State Board of Education are discouraged from voting abstention. They should only be used in rare instances with a full explanation to the Board, as outlined in the Oregon Government Ethics Commission Manual.

## POLICY #202 - Executive Session

The Board may schedule an Executive Session closed to the public, under certain circumstances allowed by law, including the following:

1. To consider the function of a public officer, employee, staff member or individual agent.
2. 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.
3. To conduct deliberations with persons designated by the governing body to negotiate real property transactions.
4. To consider information or records that are exempt by law from public inspection.

The Board as a whole can invite or include whomever they wish to attend an Executive Session, including Board Advisors. Such invitations should be made via a motion during a meeting of the

[2] *Attorney General's Public Records and Meetings Manual*, Appendix C, E Proxy Vote, Absentee Vote, Votes by Mail, and Secret Ballots Prohibited. January 2008, p. C-6.

Board, to be approved by a majority vote of the Board. Additionally, the Chair has the discretion of allowing Board advisors, staff, and others to attend the meetings.

No executive session may be held for the purpose of taking any final action or making any final decision.

Representatives of the press, unless a party to the litigation, may sit in on executive sessions but may not report on them.

When the Board convenes an executive session for the purposes of conferring with counsel on current litigation or litigation likely to be filed, the Board shall bar any member of the news media from attending the executive session 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 (ORS 192.660).

If an executive session is to be held, the meeting notice shall be given to the members of the Board, to the general public, and to news media which have requested notice, stating the specific provision of law authorizing the executive session (ORS 192.640, Attorney General's Public Records and Meetings Manual, 2005, p.129, 143,).

A record of any executive session may be written minutes or be kept in the form of a sound or video tape or digital recording, which need not be transcribed unless otherwise provided by law. If the disclosure of certain material is inconsistent with the purpose for which a meeting under ORS 192.660 is authorized to be held, that material may be excluded from disclosure. However, excluded materials are authorized to be examined privately by a court in any legal action and the court shall determine their admissibility (ORS 192.650).

Executive Sessions are confidential and as such information discussed in Executive Session cannot be shared with individuals who were not part of the Executive Session.  lawyer-client privilege attaches to such a session. Violation of confidentiality may result in that member being barred from future executive sessions and possible removal from the Board.

If the Chair is aware of a conflict of interest, or potential conflict of interest by members, or that a member is a party in the litigation, the Chair will report that conflict to the Office of the Governor.

## POLICY #203 - Public Meeting Locations

Physical meetings of the Board shall be held within the State of Oregon. The Board shall not hold a meeting at any place where discrimination on the basis of race, color, creed, sex, sexual orientation, gender identity, national origin, age, or disability is practiced. It is discrimination on the basis of disability for the Board to meet in a place inaccessible to the disabled, or, upon request of a deaf or hard-of-hearing person, to fail to make a good faith effort to have an interpreter for deaf or hard-of-hearing persons provided at a regularly scheduled meeting (ORS 192.630).]

The State Board of Education will conduct all meetings in accordance with state law and these will be accessible to persons with disabilities.

## POLICY #204 - Virtual Meetings

Acknowledging that flexibility is paramount to the work of the board and that because of the geographic residence of some of the Directors, the Board reserves the right to conduct some of its regular meetings in a fully virtual format.

It is understood that the priority of the Board is to hold in-person meetings, and as such a minimum of 3 of its annually required meetings, prioritized and approved by the full Board, will be held in person.

The State Board has specifically named the importance of engaging historically excluded community voice and those most impacted by the decisions they make. As such, to the greatest extent possible, the State Board expects regular business meetings to be accessible by livestream.

## POLICY # 205 - Records

**205.1 - Minutes and Other Written Records**

The Board shall provide for the sound, video, or digital recording or the taking of written minutes of all its meetings. Either meeting minutes or meeting recordings shall be available to the public within a reasonable time after the meeting and shall include at least the following information:

1. All members of the Board present;
2. All motions, proposals, resolutions, orders, ordinances and measures proposed and their disposition;
3. The results of all votes and the vote of each member by name;
4. The substance of any discussion on any matter; and
5. Subject to public records law, a reference to any document discussed at the meeting. (ORS 192.650)
    a. Meeting minutes, recordings, and materials presented to the Board shall be available to the public and posted to the Board's designated website.

**205.2 - Definition of Public Records**

A "Public Record" means any information that:

1. Is prepared, owned, used or retained by a state agency or political subdivision;
2. Relates to an activity, transaction or function of a state agency or political subdivision; and
3. Is necessary to satisfy the legal, administrative, fiscal, tribal cultural or historical policies, requirements or needs of the state agency or political subdivision.

It does not include:

1. Records of the Legislative Assembly, its committees, officers and employees.
2. Library and museum materials made or acquired and preserved solely for reference or exhibition purposes.
3. Records or information concerning the location of archaeological sites or objects as those terms are defined in ORS 358.905.
4. Extra copies of a document, preserved only for convenience of reference.
5. A stock of publications.
6. Messages on voicemail.
7. Records of the Judicial Department or its officers and employees.
8. Spoken communication that is not recorded. (ORS 192.005)

**205.3 - Access to Public Records**

All board materials are public documents and available to the public upon request. An exception is confidential lawyer-client materials. In addition, work done on private e-mail accounts as well as personally purchased computers and handheld devices might be considered a public record for both access and retention/disposition (ORS 192.355). All Public Records Requests will be coordinated and fulfilled by the Department using the Department's public records request portal and process. The State Board Administrator will notify State Board members if their records are subject to a request. Public Records Requests may be made anonymously and do not require any stated intent.

**205.4 - Retention of Public Records**

The State Board of Education will follow the retention schedule suggested by the Secretary of State's Archivist (ORS 192.105; OAR 166-350-0010). With the exception of records relating to the Oregon State Lottery, tampering with a public record is a Class A misdemeanor (ORS 162.305).

Public record retention for the Board is managed by the Board Administrator as an employee of the Oregon Department of Education. Records kept by Board members will be turned over to the Board Administrator for required retention, archival and disposal.

**205.5 - Archiving Records**

The Board shall follow the retention schedule suggested by the Secretary of State's Archivist (ORS 192.105). This process will be managed by the Board Administrator.

Legal/Statutory References

| | |
|---|---|
| ORS 192.630 | ORS 192.670 |
| ORS 192.680 | ORS 244.350 |
| ORS 326.041 | ORS 182.020 |

ORS 192.640
ORS 244.020
ORS 244.130
ORS 192.640
ORS 192.005
ORS 192.005, OAR 166-350- 0010
ORS 192.355
ORS 162.305
ORS 174.130
ORS 244.120
ORS 192.660
ORS 192.650
ORS 192.311(5)(a)
ORS 192.355
ORS 192.105; OAR 166-350-0010
ORS 192.105

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Board Policy & Procedure Cross References

(Cite all cross referenced policies & procedures here)

# *SECTION VI - Board Professional Development*

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    - 600P.1 - Advisement on Activities
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    - 600P.3 - Competing Interests
    - 600P.4 - Reporting on Activities
    - 600P.5 - Reimbursement of Approved Activities

## POLICY #600 - Professional Development and Partnership Collaborations

An important function of the Board is to understand and collaborate with local, state, and national entities that perform similar or adjacent functions. To this end, any Board member, including advisors and ex-officio members, may attend relevant professional development opportunities; local or national association meetings, conventions, conferences, or other learning and/or governance opportunities; or other events that will enhance their work on the Board and the Board's collective function. Professional development and Board advancement can also include relevant subscription and publication costs.

The Board Chair shall work closely with the Board Administrator and ODE Director to ensure that funding is available for the Board to benefit from regular professional development.

Professional development opportunities are considered relevant if recommended by the ODE Director or Board Administrator. The Leadership Team will have the discretion to decide which opportunities appear to be most likely to produce the greatest benefit to the Board.

All professional development opportunities will need approval as indicated in PROCEDURE #600P.

**600.1 - Out of State Travel**

It is the policy of the state that all out-of-state travel by state agency personnel shall be allowed only when the travel is essential to the normal discharge of the agency's responsibilities and shall be conducted in the most efficient and cost-effective manner resulting in the best value to the state.

- All out-of-state travel must be for official state business.
- Use of out-of-state travel must be related to the Board's scope of responsibilities.
- Travel awards earned while conducting state business shall be used to reduce the costs of state travel. The use of travel awards obtained while conducting state business for personal travel constitutes personal gain from state employment and violates ORS 244.040.

Professional development opportunities that require out-of-state travel are subject to the Department's out-of-state travel process and the approval of the ODE Director. Board members will work closely with the Board Administrator to navigate that process.

# PROCEDURE #600P - Professional Development Approval

**600P.1 - Advisement on Activities**

The Deputy Superintendent or the Board Administrator will inform Board members in a timely manner of upcoming conferences, conventions and workshops. Board members may also recommend or request to attend specific professional development opportunities.

**600P.2 - Approval**

Professional development opportunities are subject to funding availability, and require the approval of either the Leadership Team or a majority of Board Directors.

**600P.3 - Competing Interests**

In the event that more than one Board member is interested in the same professional development opportunity, the Board Leadership Team will consider the benefits to the Board and determine member attendance.

**600P.4 - Reporting on Activities**

Board members will report back to the Board what they learned, and any other highlights of the event at the next Board meeting during their Director Report. The Board may also request a written report with recommendations or materials acquired at the event.

**600P.5 - Reimbursement of Approved Activities**

When attendance is authorized for a professional development opportunity, Board members will be reimbursed for reasonable and necessary expenses at the approved per diem and mileage state reimbursement rates, and actual cost of necessary incidental expenses, according to Section VII: Board Compensation and Professional Development.

# *SECTION VII - Board Compensation and Travel Policy and Procedures*

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- Policy #700 - General Travel
- Policy #701 - Authorized Compensation
- Policy #702 - Lodging Arrangements
- Policy #703 - Transportation Arrangements
- Policy #704 - Reimbursement Eligibility
- Procedure #704P - Reimbursement Process
    - 704P.1 - Lodging and Per Diem
    - 704P.2 - Mileage for use of Private Vehicles
    - 704P.3 - Reimbursement Forms

## Policy #700 - General Travel

To perform the official duties of the Board, Board members will be required to engage in regular travel (see Section IV: Board Member Responsibilities). Board Directors and advisors will keep the Chair and Board Administrator apprised of activities undertaken on behalf of the Board and will seek prior approval for travel not described within Sections IV and VI. All state-funded out-of-state travel will be reviewed and approved in advance by the Board Leadership Team. Any activities undertaken on behalf of the Board will be reported at a subsequent Board meeting.

In approving activities or travel, the Board Chair shall work closely with the Board Administrator and ODE Director to ensure that funding is available.

## Policy #701 - Authorized Compensation

Board Directors who are not employed in full-time public service are authorized to receive compensation for each day or portion thereof during which the member is actually engaged in the performance of official duties; Board Directors that meet the definition provided in ORS 292.495 shall be provided compensation is equal to the per diem paid to members of the Legislative Assembly under ORS 171.072. Directors that do not meet the definition provided in ORS 292.495 shall instead be provided compensation in the amount of $30. Board Directors may decline to accept compensation or reimbursement of expenses related to the Directors' service on the state board or commission (ORS 292.495).

In the event that ODE lacks an availability of funds for compensation, Board Directors will be advised of this limitation. Compensation is subject to federal and state income tax withholding, social security and Medicare taxes, Workers' Compensation insurance, and Workers' Benefit Fund assessment (ORS 292.495; Dept. of Administrative Services *Oregon Statewide Payroll Services Reference Manual, Volunteers, Boards and Commissions*).

## Policy #702 - Lodging Arrangements

If lodging is required for a Board member to perform their official duties, it is an actual and necessary expense, and eligible for reimbursement. As much as possible, Board staff will arrange for lodging of Board members prior to meetings and will make direct payments to the hotel. Such a practice is designed to reduce Board members' out-of-pocket expenses. Board staff will work closely with Board members and make every attempt to secure lodging at the per diem amounts maintained by the U.S. General Services Administration (GSA) for the geographic location a meeting occurs in. In the event that Board staff and a Board member cannot come to an agreement on lodging, the Chair and Board Administrator will determine a final outcome.

Individuals using their personal travel trailer, motor home, tent, time-share, second home, or staying with a family member or friend are eligible for compensation at the non-commercial lodging per diem rate of $25 (Oregon Accounting Manual 40.10.00.PO, section 120).

## Policy #703 - Transportation Arrangements

When considering transportation methods, Board staff and Board members should prioritize the most expeditious means of transportation practicable and commensurate with the nature and purpose of the Board's responsibilities.

If a rental vehicle is required for a Board member to perform their official duties, it is an actual and necessary expense, and eligible for reimbursement. As much as possible, Board staff will reserve rental vehicles for Board members prior to meetings and will have the rental agency directly bill the Department. Such a practice is designed to reduce Board members' out-of-pocket expenses. Staff will work closely with Board members and make every attempt to reserve compact or compact-size economy vehicles. In the event that Board staff and a Board member cannot come to an agreement on a rental vehicle, the Chair and Board Administrator will determine a final outcome (Oregon Accounting Manual 40.10.00.PO, section 125).

In certain circumstances, the most expeditious means of transportation may be air travel. When determined to be an actual and necessary expense, Board staff will work closely with Board members to secure coach seats using the state's contracted airfare provider. In the event that business is combined with personal travel, Board members will notify both the Chair and Board Administrator, and follow all the requirements of section 126 of the Oregon Accounting Manual 40.10.00.PO.

## Policy #704 - Reimbursement Eligibility

All Board members, including advisors, are eligible for the reimbursement of actual and necessary travel or other expenses incurred in the performance of a member's official duties within the limits provided by law or by the Oregon Department of Administrative Services under ORS 292.210 to 292.250. "Other expenses" includes those incurred by a member of the Board in employing a substitute to perform duties, including personal, normally performed by the member, which the member is unable to perform because of the performance of official duties and which by the nature of such duties cannot be delayed without risk to health or safety. No member shall be reimbursed for expenses incurred in employing a substitute in excess of $25 per day (ORS 292.495).

As a state agency, the State Board of Education is broadly subject to the provisions of the Oregon Accounting Manual (OAM 01.05.00.PO, section .105).

## Procedure #704P - Reimbursement Process

The following process describes reimbursement for permissible and authorized travel for State Board of Education members. All noted limitations will apply to this process.

### 704P.1 - Lodging and Per Diem

When seeking travel reimbursements, receipts for lodging are required. Receipts for meals are only required when the expenses exceed the state per diem or if gratuities are claimed. Gratuities of 15% actual meal costs are permissible if reasonable and necessary for the conduct of state business and need to be documented on the receipt (Oregon Accounting Manual 10.40.00.PO, section .150). If using per diem for meals, reimbursement will be provided according to section 117 of the Oregon Accounting Manual 40.10.00.PO.

### 704P.2 - Mileage for use of private vehicles

Reimbursement for expenses incurred in a privately owned motor vehicle shall be at the rate established and regulated by the Oregon Department of Administrative Services. Reimbursement shall be paid only for distances actually traveled and trips made in the performance of official or state related duties. The rate is deemed to include gasoline, oil, repair parts, depreciation, taxes, insurance and maintenance and upkeep of every kind and nature (ORS 292.250).

### 704P.3 - Reimbursement Forms

Board staff will provide Board members with the appropriate reimbursement forms and guide them through the reimbursement process. Board members will provide Board staff supporting documentation as necessary to ensure timely processing of reimbursements.

### 704P.4 - Timely Reimbursements

Reimbursement will be managed by the Board Administrator, or their designee(s), and is expected to be done in a regular and timely fashion. If a Board member has not received a travel reimbursement within 30 days of submission, the Board member shall notify the Board Chair, Board Administrator, and ODE Director.

# *SECTION VIII - Board Communications*

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- Policy #800 - Definitions
- Policy #801 - Social Media
    - 801.1- Function and Intent of Social Media
    - 801.2 - Official Social Media Accounts
    - 801.3 - Social Media Account Oversight
- Policy #802 - Board Member Email Account Guidelines
- Policy #803 - Observing Public Meeting Law in all Communication Interfaces

## Policy #800 - Definitions

1. "Social Media" is an umbrella term for various forms of communication consisting of user-created text, audio and video published in a shared online environment, such as over the Internet or through mobile telephone networks, including but not limited to, social network services (e.g., Facebook, X, LinkedIn, etc.), blogs, texts, forums or message boards, audio/video content commodities (e.g., You Tube, Flickr), etc.
2. "Intellectual Property" is a product of the intellect (knowledge) that has commercial value, including copyrighted property such as literary or artistic works, and ideational property, such as patents, appellations of origin, business methods, and industrial processes.
3. “Public official” is defined in ORS 244.020(14)1 as any person who, when an alleged violation of ORS Chapter 244 occurs, is serving the State of Oregon or any of its political subdivisions or any other public body as defined in ORS 174.109 as an elected official, appointed official, employee or agent, irrespective of whether the person is compensated for the services. Volunteers are also public officials.
4. Quorum as outlined in Section II of this Manual, is 5 of the 9 directors on the State Board of Education.

## Policy #801 - Social Media

Of utmost value to the Board is engagement with students and the public, which begins with their awareness of Board priorities and actions. The use of social media by the Board is intended to address the increasing popularity and utility of social media as a rapidly evolving means of communication. The policy is to provide important standards and guidelines when using social media.

### 801.1 Function and Intent of Social Media

Social media may be used to communicate SBE stories, accomplishments, and highlights that warrant celebration and acknowledgement. Social media may be used as a tool to communicate such occasions and events with members of the community who are interested in following the work of the SBE. Social media is not intended to be a formal communication tool, and shall not replace the formal channels used for public notice of meetings, or public comment.

Social media is explicitly not an avenue for gathering public comment. Individuals interested in providing public comment shall use the process outlined within SECTION III: Public Comment. Comments made by members of the public on a Board social media account are not considered public comment.

As public officials, all Board members are expected to understand the opportunities, responsibilities, and limitations of social media use. Participation in social media on behalf of SBE is not a right, but an opportunity. Board directors, board advisors, ex-officio or their

designees are expected to treat this opportunity with due seriousness and respect, and are expected to follow the terms and conditions for any third-party sites.

## 801.2 - Official Social Media Accounts

If individual Board directors, board advisors, ex-officio or their designees requests to create a Facebook, X, or any other social media account to represent yourself as a Board director, board advisor or ex-officio member, the Chair must first approve the request. Once the Chair approves, the Board Administrator will create the social media account and give access to the Board member, ex-officio or their designee, or advisor. The Board administrator will monitor the individual Board member, board advisors, ex-officio social media account. It is the intent of the Board that directors apply the same responsibilities and limitations to communications they make regarding the work of the Board on personal social media accounts.

All Board directors, board advisors, ex-officio or their designees will maintain SBE's confidentiality, legal guidelines for speech, follow the Ethics Commission guidelines, and personal privacy. Everything on the Internet is public and searchable. Ultimately individual postings are the responsibility of the individual. Board members, board advisors, ex-officio or their designees should have no expectation of privacy while using SBE email addresses or while sending to Oregon Department of Education (ODE) computer systems and other devices. ODE and SBE will monitor and investigate the use of equipment and associated sites as necessary. “Confidential information” includes, but is not limited to, litigation and client-related information.

SBE and ODE support transparency and are committed to ensuring all postings clearly disclose relationships or endorsements, and that statements about SBE and ODE are truthful and substantiated. All published material must be true and not misleading, and all claims must be substantiated and approved. Professionalism is expected on all social media communications issued by Board members.

## 801.3 - Social Media Account Oversight

The Board Administrator monitors social media related to its activities and interests, including the activities of board members, board advisors, ex-officio or their designees. Authors of any nondisclosed relationships or statements that are false or misleading will be contacted for correction. If it is found that an author repetitively makes inaccurate statements about SBE or ODE, SBE may revoke authorization to participate in social media on behalf of the State Board of Education.

Social media websites have nearly unlimited communication potential, duration and retention, and generally can be accessed by anyone around the world. Thus, to protect SBE’s legitimate interests, Board directors , board advisors, board staff, ex-officio or their designees or volunteers who maintain or contribute to social media sites are prohibited from engaging in the following activities:

- Using social media to threaten physical violence against ODE employees, SBE members, contractors, volunteers or others associated with the organization or to harass such individuals based on their color, race, national origin, religion, sex, sexual orientation, age, disability, marital status, or any other protected status under applicable law;
- Using social media to comment on anything that would be protected by federal law under HIPPA/FERPA;
- Using social media to post intellectual property, trademarks logos or copyrighted materials owned by SBE and ODE or any of its affiliates;
- Post photos or recordings without prior notification;
- Posting SBE or ODE confidential business information, including but not limited to private information about ODE employees, volunteers, Board members, board advisors, ex-officio or their designees, service providers and suppliers, SBE's financial information;
- Using photographs, recordings, marketing materials or other materials owned by SBE for personal social media activities;
- Using social media to engage in libelous, defamatory, obscene, violent, maliciously false or otherwise egregious behavior directed at or implicating SBE, its members, visitors, employees, volunteers, contractors, service providers or others associated with the SBE or any of its affiliates.

These limitations are not intended to infringe upon any rights that Board directors, board advisors, ex-officio or their designees may have under applicable local, state and federal employment and/or labor laws. These guidelines have been created to protect the Board from liabilities.

The Governor may remove appointed members of the State Board of Education for cause at any time after notice and public hearing (ORS 326.021). Members who fail to follow the outlined policy may be subject to removal from their appointed position as indicated in Section IV of this manual.

SBE reserves the right to take any appropriate legal action necessary to stop or remedy improper or unlawful conduct involving social media.

Public record laws apply to all information posted on any social media platform while representing SBE, including private messages sent between public and private individuals.

## Policy #802 - Board Director Email Account Guidelines

Email has become a significant means of communicating within the Board Directors, advisors, ex-officio members and/or their designees.

Each Board Director shall have a state email address created as part of their orientation with the Board. The Board Administrator shall use these state emails to share meeting agendas, updates, and notices. Board Director shall use these email addresses when engaging in the work of the Board. The Board Administrator shall have access to these state email addresses. Board Directors may request assistance from the Board Administrator when crafting responses to

members of the public, and the Board Administrator will work with the Board Chair to flag any request made of the full Board.

## Policy #803 - Observing Public Meeting Law in all Communication Interfaces

As indicated in Section II of this Manual, the State Board of Education is subject to Public Meeting Law regulations. As such, any communications between a quorum of directors, either directly or through the use of an intermediary, must be publicly noticed and available to the public. A quorum cannot be convened without the prior knowledge and approval of the Board Chair for adequate public notice issuance by the Board Administrator.

It is especially important to be vigilant and cautious of email or other serial communications, such as text messaging, which may inadvertently create quorum. Board directors cannot engage in “reply all” in an original message addressed to more than one Board director. Deliberations between Board Directors should occur only in properly noticed and accessible public meetings.

The Board Chair is the only individual authorized to speak on behalf of the Board.

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Legal/Statutory References

ORS 244.020(14)
ORS 174.109
ORS 326.021

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# Oregon State Board of Education
# April 18, 2024
AGENDA ITEM: 4.B.

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|---|---|
| **SUBJECT:** Standards for Approved Recovery Schools – OAR Chapter 581 Division 30 – New Division of OARs<br>**STAFF NAME & OFFICE**: Kate Pattison, Director & Brenda Martinek, Recovery Schools Education Specialist; Director's Office<br><br>This new division establishes the standards for approved recovery schools. These schools will provide students with a holistic approach to both education for grades 9 through 12 and behavioral health services related to recovery from substance use disorders.<br><br>☒ New Rule<br>☐ Amend Existing Rule<br>☐ Repeal Rule | ☐ **First Reading**<br>☐ **Presentation**<br>☐ **No Presentation**<br>☒ **Action**<br>☐ **Temp Rule**<br>☒ **Presentation**<br>☐ **No Presentation** |

**BACKGROUND**

HB 2767 was signed in June 2023 (now ORS 336.680-336.685), establishing a limited number of approved recovery schools in Oregon. These schools, under an agreement with the Department of Education, will provide students with a holistic approach to both education and health care for grades 9 through 12 related to recovery from substance use disorders. Recovery schools will have two goals: 1) to deliver high quality education that leads to an Oregon high school diploma; and 2) to support students in recovery by providing mental and behavioral health support in a safe, supportive environment to maintain abstinence.

The new law allows for the Oregon Department of Education (ODE) to approve up to nine schools, regionally accessible across the state, between 2023 and June 2029. The Department may contract with school districts, ESDs, or public charter schools to operate approved recovery schools. These will be small high schools, typically serving between 5-30 students in spaces separate from the local high school. To support the educational and therapeutic design necessary for recovery schools to succeed in their mission, these schools are funded with a combination of State School Fund dollars and the Statewide Education Initiatives Account.

HB 2767 also established the Recovery Schools Advisory Committee that was established and started meeting in November 2023. This committee is made up of 15 members including the following categories with representation from Oregon's geographic regions and demographics.

- Three members with experience in establishing or operating recovery schools.
- One member from the Department of Education.
- One member from the Youth Development Division.
- One member from the Alcohol and Drug Policy Commission.
- One member from the Oregon Health Authority.
- One member from local public health or mental health authorities or providers.
- One member who is a family member or caregiver of a student recovering from a substance use disorder and who has experience with recovery schools or assisting others with overcoming substance use disorders.

- One youth who has experience with a recovery school or who has overcome a substance use disorder.
- One member who is an administrator of a school district or an education service district, with preference for an administrator who has experience collaborating with a recovery school.

The proposed rules outline standards for the establishment and operation of approved recovery schools in Oregon. This new division includes fourteen sections of rule that outline the process and requirements for approving new recovery schools.

1. **Definitions:** This section provides important clarity and limitations regarding the scope of what approved recovery schools will do. When possible, definitions have been aligned with definitions from the Oregon Health Authority OARs.
    a. **"Recovery"** has the meaning described by the Association of Recovery Schools in the Accreditation Manual document.

        The Association of Recovery Schools defines "recovery" in their Accreditation Manual as: "a process of change focused on substance use abstinence, through which individuals improve their health and wellness, live a self-directed life, and strive to reach their full potential."

2. **Approved Recovery School Establishment:** Allows an approved recovery school to be established as a new public school or converting from an existing public school or alternative education program. It also further clarifies that approved recovery schools cannot charge tuition to residents of Oregon and requires an application to be approved by ODE.

3. **Recovery School Approval Requirements and Timelines**: Outlines the minimum requirements of the application to operate an approved recovery school that will be submitted to ODE. These requirements will be incorporated into an RFA and corresponding guidance.

4. **Evaluation Criteria for Approved Recovery School Applications:** Names the criteria by which ODE will evaluate whether to approve an application to operate an approved recovery school.

5. **Term and Renewal of Approved Recovery School Agreements:** Establishes terms not to exceed ten years and the criteria for renewal and ongoing operation.

6. **Approved Recovery School Financial Management System and Audit:** Requires approved recovery schools to have a financial management system that complies with the uniform budget and accounting system for public schools and districts. It also requires the approved recovery school financials to be audited annually and include transparency on all funding sources to ensure actual operating costs can be calculated.

7. **Approved Recovery School Performance Evaluation:** Directs ODE to evaluate the schools based on current guidance. The current design is to align guidance with the national accreditation standards for recovery schools.

8. **Termination or Closure of an Approved Recovery School:** This section sets standards for the termination or closure of an approved recovery school.

9. **Assets of Approved Recovery Schools:** Directs assets to be given to ODE if an approved recovery school is closed. Assets may be distributed to other public schools or districts and may be prioritized to other operating approved recovery schools.

10. **Approved recovery school campus location and multiple campuses:** Describes the location and boundaries of an approved recovery school. It also describes how, and within what limitations, an approved recovery school may operate a satellite campus outside of the primary boundaries.

11. **Requirements for Student Enrollment in an Approved Recovery School:** This section prescribes the foundational standards for enrollment including screening, agreement to random drug testing, and nondiscrimination. It also describes the requirements for student records transfers and identifies who provides certain forms of notice regarding special education responsibilities.

12. **Teacher Qualifications:** Reiterates the requirement for all teachers to be licensed by TSPC and states that all experience in an approved recovery school shall be equivalent to experience in other public schools.

13. **Transportation:** Establishes the responsibility of the approved recovery school to transport students who reside in the boundary where the school is located. It allows approved recovery schools to establish new routes and for transportation costs incurred by a school district for the approved recovery school to be reimbursable.

14. **State School Fund and Statewide Education Initiative Account (SEIA) Fund Calculations for Approved Recovery Schools:** Sets the foundational formula for how approved recovery schools will be funded from the State School Fund. Students will generate a 2.0 weight based on the Statewide Average General Purpose Grant per ADMw. It requires a regular reconciliation of the funds based on actual enrollment. The Department will set a minimum funding basis from the SEIA to supplement funding to ensure there is adequate support for startup and recovery programming.

The Recovery Schools Advisory Committee has been involved in the development of the proposed rules. They have met six times since November 15, 2023 with additional subcommittees meeting to discuss these standards and how ODE will implement this new legislation.

In addition to engagement with the advisory committee, these rules have been shared with education partners, the recovery schools listserv, and the Rules Advisory Committee (RAC). All feedback has been considered and incorporated in to the current draft.

# Oregon State Board of Education
# April 18, 2024
AGENDA ITEM: 4.B.

**SUMMARY OF PREVIOUS BOARD ACTION**

These are new rules in response to HB 2767 (2023). The proposed rules were presented to the Board in March 2024 for a first read. The current draft shows revisions and additions that have been made since the March 2024 meeting.

**HAS THE RULE CHANGED SINCE LAST BOARD MEETING?**

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

- Added definitions for funding section and to simplify rules throughout.
- Included a requirement for applicants to describe their plan for supporting students who have a recurrence of substance use or return to substance use.
- Cleaned up language regarding special education requirements to align with current practice.
- Adjusted the audit language to remove burden while still maintaining a high standard of fiscal transparency and reporting.
- Included funding calculations for the Statewide Education Initiatives Account (SEIA). Allows the Department to set the minimum funding amounts for recovery schools to receive from SEIA funds following the initial SSF allocations. Sets a maximum 10% reserve for recovery schools budgets.

**POLICY ISSUE OR CONCERNS**

1. **Application Process, Contract Terms, Renewals, and Terminations: OAR vs contracts**

   ***How much detail should be included as requirements and criteria for establishing contracts to operate approved recovery schools?***

   Staff and the advisory committee have discussed how prescriptive to be in OAR versus allow for more flexibility in RFP and contracting process. The current draft of rules reflects a leaning to include specific application requirements, contract term lengths and criteria for applications, renewals, and terminations to be included in OAR. The rationale is to ensure transparency and consistency in the initial establishment and operation of approved recovery schools. Feedback from the procurement team confirmed that the OARs have a sufficient amount of detail without being overly prescriptive. Additional requirements can be negotiated into our agreements with the applicants.

2. **Transportation**

   ***Should approved recovery schools be required to transport students who enroll in the school regardless of where the student resides?***

   Staff and the advisory committee have discussed what this could mean for an approved recovery school. Typically, bus transportation is managed by school districts and limited to the district boundaries. There are concerns that requiring an approved recovery school to provide transportation outside of the school district boundary where the school is located will be very difficult to ensure. This is the goal, and an area of policy staff will study in the first years of implementation. As recovery schools are approved and begin operating, staff may recommend new rules to require transportation. Nothing in the draft rules prohibits an approved recovery school from providing all students with transportation and all costs will be allowable for reimbursement.

3. **Out of state students**

   ***Should Oregon allow students who are residents from other states to enroll in approved recovery schools?***

   The current OAR draft does not allow for out of state students. However, it is likely that some of these schools may be located close to the borders of other states. It may be possible for approved recovery schools to accept tuition for out of state students or serve them on contract with the student's resident district. However, this raised questions about special education services and enrollment capacity. The recommendation at this time is to limit enrollment to Oregon students.

## EQUITY IMPACT ANALYSIS

The proposed OARs align with the requirement in statute for the state to approve schools that represent a geographic distribution across the state to the greatest extent practicable. ODE staff, with the guidance and recommendations of the Recovery Schools Advisory Committee, are considering the disproportionate impact of substance use on certain groups of youth and communities in Oregon. These OARs have been carefully considered inequities of access to necessary prevention supports and treatment services. As ODE establishes guidance and materials related to approved recovery schools, staff will work closely with representatives from impacted youth, families, current recovery school practitioners, and recovery experts who can ensure implementation is equitable.

## FISCAL ANALYSIS

HB 2767 (2023) identifies two sources of funding for approved recovery schools: 1) State School Fund (SSF) and 2) Statewide Education Initiatives Account (SEIA). The proposed rules before the Board address the SSF and SEIA formulas. The total amount appropriated to ODE for the purpose of funding recovery schools in the 2023-25 biennium is $3,150,000.

# Oregon State Board of Education
# April 18, 2024
AGENDA ITEM: 4.B.

**EFFECT OF A "YES" OR "NO" VOTE**

A "YES" vote will result in the approval of the OARs. ODE staff and the advisory committee will be on track to establish the first approved recovery schools this fall.

A "NO" vote will result in the OARs not being approved. ODE staff and the advisory committee will need to make revisions and may not be on track to establish the first approved recovery schools this fall.

**STAFF RECOMMENDATION**

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

## ATTACHMENTS

Attachment 1: Recovery School Rules DRAFT SBE April 2024

# Standards for Approved Recovery Schools / OAR DRAFT

1. **Definitions**
   a. "ADM" means average daily membership as calculated based on the procedures and definitions in OAR 581-023-0006.
   ~~a.~~b. "ADMw" means the weighted Average Daily Membership for a Recovery School.
   ~~b.~~c. "Applicant" means an education service district, school district, or public charter school.
   ~~c.~~d. "Approved Recovery School" means a publicly funded school established by agreement with the Oregon Department of Education and operated by an education service district, school district, or public charter school to provide students enrolled in the school with:
      i. Educational services leading up to a diploma for grades 9 through 12; and
      ii. Behavioral health services related to recovery and relapse prevention from substance use disorders.
   ~~d.~~e. "Behavioral Health Services" means recovery support services for substance use disorders and mental health. For the purpose of operating an approved recovery school, this does not include substance use disorders treatment services, medical, or psychiatric services.
      i. Examples of behavioral health services may include providing Certified Recovery Mentors, Peer Support Specialists, Certified Alcohol and Drug Counselors.
   ~~e.~~f. "ESD" means an education service district as defined in ORS 334.003.
   g. "Minimum Basis of Funding" means an amount that is determined by the program administrator to provide a minimum level of funding for a Recovery School, where enrollment levels may not be adequate to provide sufficient funding for startup.
   ~~f.~~h. "Primary Campus" means the school facility located within the applicant's geographic boundary.
   ~~g.~~i. "Public Charter School" means a public school as defined in ORS 338.005.
   ~~h.~~j. "Recovery" has the meaning described by the Association of Recovery Schools in the Accreditation Manual document.
   ~~i.~~k. "Satellite Campus" means a school facility that is not the primary campus and may be located outside of the applicant's geographical boundary.
   ~~j.~~l. "School District" means a common or union high school district as defined in ORS 332.002.
   m. "SEIA Formula Balance" means the proration of remaining State Education Initiative Account funds to be distributed equitably amongst all Recovery Schools, where ADMw will be used in the numerator.
   n. "Statewide Average General Purpose Grant per ADMw" means the aggregate general-purpose grants for all school districts divided by total ADMw for all school districts.
   ~~k.~~o. "Substance Use Disorder" as defined in DSM-5-TR, means disorders related to the taking of a drug of abuse including alcohol, the side effects of a medication, or a toxin exposure. The disorders include substance use disorders and substance-induced disorders, which include substance intoxication and withdrawal, and substance-related disorders such as delirium, neuro-cognitive disorders, and substance-induced psychotic disorder.
   ~~l.~~p. "Substance Use Disorders Treatment Services" means outpatient, intensive outpatient, and residential services and supports for individuals with substance use disorders.
   q. "Urinalysis Test" means a sensitive, rapid, and inexpensive immunoassay screen that identifies the presence of a specific drug or metabolite in a urine specimen to eliminate "true negative" specimens from further consideration.
2. **Approved Recovery School Establishment**
   a. Established as a:

i. A new public school;
ii. From an existing public school; or
iii. From a public alternative education program as defined in ORS 336.615

b. To operate as an approved recovery school, it must:
i. Be approved by the Oregon Department of Education; and
ii. Not charge tuition for Oregon residents.

c. An applicant seeking to establish an approved recovery school shall submit an application to the Oregon Department of Education. The form and timelines will be determined by the Oregon Department of Education.

**3. Recovery School Approval Requirements and Timelines**

a. An applicant seeking to establish an approved recovery school shall submit a written application to the Oregon Department of Education.
i. The Department shall determine the form, contents and timelines of the application to become an approved recovery school;
ii. Determine the records required for review and ordering the production of those records from the applicant and establishing timelines for the production of those records; and
iii. Requiring the applicant to respond to written or oral inquiries related to review.

b. The application shall include, but need not be limited to:
i. The identification of the applicant;
ii. The name of the proposed approved recovery school;
iii. A description of the philosophy and mission of the approved recovery school;
iv. A description of the curriculum of the approved recovery school;
v. The governance structure of the proposed approved recovery school;
vi. The projected enrollment to be maintained and the grades to be served;
vii. The legal address, facilities and physical location of the proposed approved recovery school, if known;
viii. A description of admission policies and application procedures including how the school will satisfy the requirements in Section 11 of this chapter;
ix. The proposed budget and financial plan for the proposed approved recovery school and evidence that the proposed budget and financial plan for the proposed approved recovery school are financially sound;
x. A description of the financial plan for the proposed approved recovery school, an explanation of how the financial management system will meet the requirements of Section 6 in this chapter, and a plan for having the financial management system in place at the time the school begins operating;
xi. The standards for behavior and the procedures for the discipline, suspension or expulsion of students;
xii. A plan for how the proposed approved recovery school will support students who have a recurrence of substance use or return to substance use.
~~xii.~~xiii. A proposed plan for overdose prevention and responsiveness;
~~xiii.~~xiv. The proposed school calendar for the proposed approved recovery school, including the length of the school day and school year;
~~xiv.~~xv. A description of the proposed staff members and required qualifications of teachers, special education providers, and therapeutic or recovery staff;

~~xv.~~xvi. The date upon which the proposed approved recovery school would begin operating;

~~xvi.~~xvii. The ~~arrangements for any necessary~~provision of special education and related services pursuant to ORS 336.680 for students with disabilities who may attend the proposed approved recovery school;

~~xvii.~~xviii. Information on the manner in which community groups may be involved in the planning and development process of the proposed approved recovery school;

~~xviii.~~xix. A description of the formal and informal partnerships with other agencies and community based organizations;

~~xix.~~xx. A proposed plan for the training and development of teachers and school employees;

~~xx.~~xxi. The manner in which the educational and recovery program will be evaluated;

~~xxi.~~xxii. The manner in which the financial performance of the school will be audited;

~~xxii.~~xxiii. A description of the instructional program and assessments including any online or remote instructional classes and supports that will be offered;

~~xxiii.~~xxiv. A plan to be accredited by a nonprofit accrediting organization composed of representatives of recovery schools and individuals who support the growth of recovery schools;

~~xxiv.~~xxv. A description of recovery support programming, including alternative peer groups, and a plan to assess it.

**4. Evaluation Criteria for Approved Recovery School Applications**

a. The Department of Education will evaluate an application to be an approved recovery school using the following criteria:

i. The demonstrated, sustainable support for the approved recovery school by local education agencies, teachers, parents, students, partner organizations, and other community members;

ii. The capability of the applicant, in terms of support and planning, to provide comprehensive, culturally responsive, instructional programs to students pursuant to an approved application;

iii. The capability of the applicant, in terms of support and planning, to provide recovery ~~and therapeutic~~ programs to students, including the school's plan for overdose prevention and responsiveness, pursuant to an approved application;

iv. The demonstrated financial planning and viability of the applicant to operate sustainable approved recovery school;

v. ~~Whether there are arrangements for any necessary~~The capability of the applicant to provide child find, special education, and related services for students with disabilities pursuant to ORS 336.680;

vi. The proposed geographic location of the approved recovery school and any associated satellite campuses;

vii. The demonstrated need~~s~~ for services by the community in which the approved recovery school would be located; ~~and~~

viii. The prior history, if any, of the applicant in operating a recovery school or program, other public or private school, or in providing educational services; and

~~viii.~~ix. Any other information the Oregon Department of Education deems relevant to the decision.

**5. Term and Renewal of Approved Recovery School Agreements**

a. Upon approval of an application by the Oregon Department of Education under ORS 336.680, the Department of Education shall enter into an agreement with the ESD, school district, or public charter school to operate the approved recovery school.

b. The initial agreement to operate an approved recovery school shall be in effect for a period of not more than five years and shall be renewed upon the approval of the Department of Education using the process established under this rule.
    i. Renewals of an approved recovery school shall be for a minimum of five years but may not exceed 10 years.
c. The approved recovery school shall submit a renewal application to the Oregon Department of Education.
    i. The Department shall determine the form, contents and timelines of the application for renewal;
    ii. Determine the records required for review and ordering the production of those records from the approved recovery school and establishing timelines for the production of those records; and
    iii. Requiring the approved recovery school to respond to written or oral inquiries related to renewal review.
d. The Department of Education shall evaluate an application to renew an approved recovery school using the following criteria:
    i. Is in compliance with state and federal laws;
    ii. Is in compliance with the agreement to operate an approved recovery school;
    iii. Is accredited or in the process of becoming accredited, by a nonprofit accrediting organization that establishes standards for recovery schools;
    iv. Is fiscally stable, is using a sound financial management system, and produces audited financial statements that comply with Section 6 of this chapter;
    v. Is in compliance with any renewal criteria in the agreement to operate an approved recovery school; and
    vi. Is meeting or working toward meeting the student performance goals and other performance goals specified in the agreement to operate an approved recovery school.
e. The Department of Education shall base the evaluation described in subsection (d) of this rule primarily on a review of the approved recovery school's accreditation, annual audit of accounts, site visits, and any other information mutually agreed upon by the approved recovery school and the Department of Education.

**6. Approved Recovery School Financial Management System and Audit**

a. The financial management system of an approved recovery school must include a budget and accounting system that:
    i. Complies with the requirements of the uniform budget and accounting system adopted by rule of the State Board of Education under ORS 327.511; and
    ii. Complies with the Oregon Program budgeting and Accounting Manual published by the Oregon Department of Education.
b. An approved recovery school shall maintain financial records that include all funding sources, expenditures, assets, and liabilities related to the operation of the approved recovery school minimally including:
    i. Public funds received from the Oregon Department of Education;
    ii. Grants received from public or private grantors;
    iii. Donations;
    iv. In kind services or donations;

v. Loans or other financial debts;
vi. Student accounts; and
vii. Any other records necessary for complete and transparent accounting for the approved recovery school.

c. An approved recovery school's financials shall be audited annually in accordance with Municipal Audit Law. The audit may be included as a special report within the audit of the ESD, school district, or public charter school. If the approved recovery school's audit is not included, the approved recovery school must submit an ~~The~~ audit ~~must~~that minimally include:
i. Expenditures of the approved recovery school for administration, instruction, recovery programs, attendance, health services, operation of plant, maintenance of plant, fixed charges, transportation, food service, and student body activities; and
ii. Revenue from public and private sources including fees.

d. Audited financial statements shall be submitted to the Oregon Department of Education.

e. An approved recovery school may be required to provide the Oregon Department of Education with regular financial reports described in the agreement to operate an approved recovery school.

**7. Approved Recovery School Performance Evaluation**

a. The Oregon Department of Education may evaluate the performance of an approved recovery school according to prevailing ODE Guidance.

**8. Termination or Closure of an Approved Recovery School**

a. During the term of an approved recovery school agreement, the Oregon Department of Education may terminate the agreement on any of the following grounds:
i. Failure to comply with state and federal laws.
ii. Failure to comply with the agreement to operate as an approved recovery school.
iii. Failure to obtain and maintain accreditation status by a nationally recognized recovery organization ~~after~~ by the fifth year of operation.
iv. Failure to maintain financial stability.
v. Failure to maintain a financial system that complies with Section 6 of this chapter.

b. Notwithstanding subsection (a) of this section, the Oregon Department of Education may terminate an agreement immediately and close an approved recovery school if the school is endangering the health or safety of the students enrolled in the approved recovery school.
i. The approved recovery school may request a hearing from the Department of Education on the termination of the approved recovery school under this subsection. The Department of Education shall hold a hearing within 10 days after receiving the request.

c. Termination of an approved recovery school shall not abridge the ESD, school district, or public charter school from operating a public school or program that is not an approved recovery school.

d. If an approved recovery school is terminated or closed, the student education records of the approved recovery school shall be transferred to:
i. For an approved recovery school that was operated by an ESD, to the administrative office of the ESD;
ii. For an approved recovery school that was operated by a school district, to the administrative office of the school district; or
iii. For an approved recovery school that was operated by a public charter school, to the administrative office of the school district in which the public charter school was located.

e. An ~~approved recovery school~~ ESD, school district, or public charter school may only terminate or close an operating approved recovery school at the end of a semester or trimester.

**9. Assets of Approved Recovery Schools**

a. Assets of a terminated or closed approved recovery school that were obtained with public funds received because of the school's status as an approved recovery school will be given to the Oregon Department of Education. The Oregon Department of Education, at its discretion, may disburse these assets to ESDs, school districts or other public schools. The Department of Education will:

i. Determine the form, process, and timelines for the disbursement;

ii. Determine the records required for the disbursement; and

iii. Require the approved recovery school to respond to written or oral inquiries related to the closure and assets of the approved recovery school.

b. Assets of a terminated or closed approved recovery school that were obtained with grant funds will be disbursed according to the terms of the grant. If the grant is absent any reference to ownership or distribution of assets, assets of a terminated or closed approved recovery school will be disbursed according to the provision set out in subsection (a) of this rule.

**10. Approved Recovery School Campus Location and Multiple Campuses**

a. An approved recovery school may operate multiple campuses under a single agreement to operate an approved recovery school in order to serve students in remote geographic areas.

b. An approved recovery school shall maintain a primary campus in:

i. The boundary of an ESD for a school operated by an ESD;

ii. The school district boundary for a school operated by a school district; or

iii. The school district boundary in which the public charter school is located for a recovery school operated by a charter school.

c. If an approved recovery school operates a satellite campus, the following is required:

i. An approved recovery school shall offer a comparable level of educational and behavioral health services to students at the satellite campus as offered to students at the primary campus;

ii. Students shall have access to in-person behavioral health services; and

iii. Student records shall be sent to the primary campus when a student withdraws;

d. If an approved recovery school operated by an ESD operates a satellite campus outside of the service district boundary, the ESD must obtain written permission from the school district in which the satellite campus is located prior to the first day students will be served at the campus.

e. The Oregon Department of Education must approve the operation of a satellite campus and the approval must be incorporated into the signed agreement with the approved recovery school.~~The option to operate a satellite campus must be allowed in the agreement to operate an approved recovery school with the Oregon Department of Education.~~

**11. Requirements for Student Enrollment in an Approved Recovery School**

a. Student enrollment in an approved recovery school is voluntary.

b. All students who are residents in Oregon are eligible for enrollment in an approved recovery school if space is available and if the student:

i. Has a diagnosis for substance use disorder;

ii. Has completed or participated in a substance use disorder treatment services program; or

iii. Has completed a screening process with the approved recovery school that considers history of substance use, educational records, behavioral health history, and the student's willingness to participate in recovery services offered by the school.

c. Students must demonstrate their readiness to change through a standard screening process established by the approved recovery school.

d. Students who enroll in an approved recovery school shall participate in random urinalysis testing or other non-invasive drug testing provided by the school.

i. Fees and costs associated with testing shall be paid for by the approved recovery school.

e. An approved recovery school may require students to tour the campus and participate in an enrollment meeting. ~~and~~

~~e.~~f. An approved recovery school may require students to participate in a substance use disorder screening process with staff or students prior to enrolling in the approved recovery school.

~~f.~~g. An approved recovery school may not limit student enrollment based on race, religion, sex, sexual orientation, gender identity, ethnicity, national origin, disability, the terms of an individualized education program, income level, or proficiency in the English language.

~~g.~~h. If the number of students enrolling in an approved recovery school exceeds the capacity of the program, class, grade level, or building, an approved recovery school may give priority for admission to student groups identified in ORS 327.180(2)(b) and OAR 581-014-0001(4).

~~h.~~i. Within 10 days of a student's enrollment in an approved recovery school, the Department of Education shall provide to the student's parent, legal guardian or person in parental relationship written information about:

i. ~~The Department of Education's responsibility~~Child find obligations to identify, locate and evaluate students enrolled in the approved recovery school to determine ~~which~~ if students ~~may be in need of~~qualify for special education and related services; and

ii. ~~The methods by which the Department of Education may be~~Who they can contact~~ed~~ to answer questions or provide additional information related to special education and related services.

~~i.~~j. When a student withdraws from an approved recovery school for a reason other than graduation from high school, the approved recovery school shall:

i. Provide to the school district in which the student resides written notice that the student has withdrawn.

ii. Provide to the student's parent, legal guardian or person in parental relationship written information about:

1. Compulsory attendance requirements;
2. The responsibility of the school district in which the student resides to identify, locate, and evaluate students who reside in the school district to determine ~~which~~ if students ~~may be in need of~~qualify for special education and related services; and
3. ~~The methods by which~~How to contact the school district in which the student resides ~~may be contacted~~in order to answer questions or provide information related to special education and related services.

~~j.~~k. If a student enrolls in an approved recovery school and has an individualized education program, the Department of Education must implement the individualized education program and follow the terms of the individualized education program until a new individualized education program is developed.

l. If a student withdraws from an approved recovery school and has an individualized education program, the school district in which the student resides must implement the individualized education program and follow the terms of the individualized education program until a new individualized education program is developed.

~~k.~~m. The Oregon Department of Education may contract with a school district, ESD, or approved recovery school to meet its obligations within this section.

~~l.~~n. An approved recovery school may conduct fund-raising activities but may not require a student to participate in fund-raising activities as a condition of admission or continued enrollment to the approved recovery school.

**12. Teacher Qualifications**

a. For teacher licensing, employment experience at an approved recovery school shall be considered equivalent to experience in public schools.

b. Any person employed as an administrator or teacher in an approved recovery school shall be licensed by the Teacher Standards and Practices Commission.

**13. Transportation**

a. The approved recovery school is responsible for transporting students who reside within the school district where the approved recovery school is located and are enrolled in the approved recovery school.

b. An approved recovery school may establish bus routes or other transportation services to transport students who reside outside of the school district boundary where the approved recovery school is located.

c. Any transportation costs incurred by a school district under this section shall be considered approved transportation costs for the purpose of ORS 327.013 in the same manner as transportation costs incurred by the school district for transporting students who attend other public schools are considered approved transportation costs for purpose of ORS 327.013.

**14. State School Fund Calculations and Statewide Education Initiatives Account Fund Administration for Approved Recovery Schools**

~~a. The following definitions shall apply for purposes of calculating the State School Fund distribution to the Recovery Schools Program:~~

~~i. "Statewide Average General Purpose Grant per ADMw" means the aggregate general-purpose grants for all school districts divided by total ADMw for all school districts;~~

~~ii. "ADM" means average daily membership as calculated based on the procedures and definitions in OAR 581-023-0006.~~

~~b. If in any fiscal year the General Purpose Grant cannot be calculated as a result of temporary changes to the State School Fund distribution formula, the General Purpose Grant per ADMw shall be the same amount as in the last fiscal year that this factor was calculated.~~

a. For each biennium, the Oregon Department of Education will determine the amount of grant funds to be apportioned among eligible Recovery Schools for each year of the biennium.

b. For purposes of establishing the amount of grant funds apportioned from the State School Fund (SSF), the Oregon Department of Education will use estimates of enrollment from the Recovery School(s) for the initial appropriation calculation. An update to estimated payments will be made when the ADM data from the 2nd period ADM collection is available. Lastly, the Annual ADM collection data will be used for reconciliation in the following year for each school year. Any adjustments in funding due to final reconciliation will be netted against Recovery School payments in the subsequent fiscal year.

c. The amount of the distribution from the State School Fund shall be equal to the product of the Recovery School Program ADM times 2.0 times Statewide Average General Purpose Grant per ADMw.

d. Based on estimates of the distribution calculated in subsection (c~~3~~) of this rule, funds shall be transferred to the Recovery School Program approximately 35 percent on the 15th day of each of the months of July and October, 15 percent on the 15th day of January, and the balance on April 15.

e. Adjustments to reflect actual Recovery School Program ADM and the actual Statewide Average General Purpose Grant per ADMw shall be made on May 15 of the subsequent fiscal year.

f. For the allocations made from the State Education Initiative Account (SEIA), a Recovery School shall receive a Minimum Basis of funding, which will provide a portion of the balance of resources not provided by the SSF for actual cost for providing education to students, to the greatest extent practicable. If the amount from the SSF exceeds the Minimum Basis, then additional resources from the Minimum Basis won't be necessary.

g. For any remaining SEIA funds after the Minimum Basis is established for each Recovery School, the SEIA Formula Balance will apply an equitable proration using the ADMw of each school. This amount will be in addition to the Subtotal Funding of both the SSF portion and the Minimum Basis portion. This becomes Total Funding, which represents the SSF portion plus the SEIA portion plus the SEIA Formula Balance.

h. A reserve will be established in the preliminary payments of the SEIA funds at the discretion of the Recovery School program administrator until final reconciliation in the following year. This is intended to provide positive cash flow and help with smoothing in the netting of reconciliation payments.

i. Any remaining funds allocated to approved recovery schools from the SSF and the SEIA Account shall remain with the Department of Education and shall be adjusted in the year following the distribution to reflect the actual ADMw of student in the approved recovery schools in the same manner as for school districts under ORS 327.101.

j. Following approval of the intergovernmental agreement, an eligible recipient will receive payments of at least 25 percent on a quarterly basis per annual allocation. If adjustments to installment payments are required, a lower percentage may be used.

k. Recipients will be eligible to expend funds until ninety (90) days after the end of the first fiscal year of a biennium. Any allocated funds in excess of 10% of the total operating budget of that fiscal year that are not used by a recipient by September 30 of first year of the biennium or June 30 of the second year of the biennium will be returned to the Recovery School Fund for distribution in the next biennium.

~~f.~~l. The Deputy Superintendent of Public Instruction shall resolve any issues arising from the administration of the Recovery School funds not specifically addressed by this rule. The Deputy Superintendent of Public Instruction's determination shall be final.

# Oregon Approved Recovery High Schools FAQ: 2024

## Purpose

This document provides answers to frequently asked questions (FAQs) about HB 2767 (2023), which is intended to provide oversight and funding for Recovery High Schools in Oregon, not to be confused with *credit recovery* programs. Recovery High Schools provide education and support for students in recovery from substance use and co-occurring mental health challenges.

## Overview of House Bill (HB) 2767

HB 2767 established a limited number of approved Recovery High Schools in Oregon. These schools, under an agreement with the Department of Education, will provide students with a specialized high school education experience, tailored to meet the needs of students with substance use and co-occurring mental health challenges. The new law requires standards for approved recovery schools, graduation, evaluation and recovery school accreditation guidance.

## What is the purpose of Recovery High Schools?

Recovery high schools serve several essential purposes in supporting students with substance use and co-occurring mental health challenges:

- **Safe and Supportive Environment:** Recovery high schools provide a safe and supportive environment where students can focus on their recovery without the pressures and triggers that may exist in traditional high school settings.
- **Academic Continuity:** Recovery high schools ensure that students continue their education, which leads to graduation, while receiving the necessary support and resources to address their substance use and co-occurring mental health care needs.
- **Comprehensive Services:** Recovery high schools offer a comprehensive approach to recovery support, integrating substance use education, mental health and behavioral health supports, and coping skills development into academic coursework.
- **Peer Support and Sense of Community:** Recovery high schools provide a sense of community and belonging for students who may feel isolated or misunderstood in traditional high school settings.
- **Long-Term Recovery Support:** By addressing substance use and co-occurring mental health challenges early in adolescence, recovery high schools help students develop the skills, resources, and support networks they need to maintain long-term recovery and lead healthy, fulfilling lives beyond high school.

## What is the difference between a recovery high school and a credit recovery program?

Recovery high schools and credit recovery programs serve different purposes and focus on distinct populations of students:

- **Recovery High School:** The primary purpose of a recovery high school is to provide a supportive environment for students with substance use and co-occurring mental health challenges. These specialized high schools offer a comprehensive approach to education, integrating academic coursework with substance use education, mental health counseling, and support services aimed at fostering long-term recovery and academic success. The focus is on addressing the underlying issues contributing to substance use and co-occurring mental health challenges while supporting academic achievement, which leads to graduation.
- **Credit Recovery Program:** Credit recovery programs are designed to help students who have fallen behind in course credits to catch up and graduate on time. They are open to any student who needs to make up credits to meet graduation requirements and typically focus solely on providing students with the opportunity to earn the credits needed for graduation.

## Who can open an approved recovery school?

- Oregon School Districts, Oregon ESDs, and Oregon public charters are eligible to apply and operate an approved recovery school.
- Approved recovery schools are established by contract with ODE and must be applied for through a Request for Application (RFA) process.

## What is the process and timeline to apply?

- Informational sessions, guidance, support, and office hours will begin in April of 2024 for interested applicants.
- Before the application opens, there will be component information and a checklist for the RFA.
- This FAQ will be updated as needed.
- The RFA is anticipated to open in June of 2024.
- The deadline for application submission will be 30-45 days from release.
- No more than three (3) contracts will be offered in August of 2024 for the 24-25 and 25-26 school year.

## If my school district/ESD/charter school is interested in applying, what should we be working on right now?

- Research and review data around substance use and co-occurring mental health needs among teens in your community.
- Begin having discussions with your special education and alternative education departments in order to determine the need.
- Cultivate partnerships with community providers, drug and alcohol programs, mental health agencies, youth organizations, and culturally specific organizations. Recovery high schools

typically offer an extended day program with extracurricular activities for youth to promote and support recovery in the community.

- Begin looking for an appropriate site for a recovery high school. It is recommended that an approved recovery high school be in a separate location from other high schools in the community.

## How are approved recovery schools funded?

The new law provides a unique funding structure to include a high school education experience and to meet graduation requirements, provide special education services, substance use supports and behavioral health services.

- State funding allows for the opening up to three (3) recovery high schools per biennium, with a maximum of nine (9) recovery high schools throughout Oregon, by July 2029.
- Approved recovery high schools will be funded with sufficient base funding in addition to a per student ADM. Funding will be separate from regular school district State School Fund (SSF) grants and will combine some SSF and Statewide Education Initiate Account (SEIA) funds.
- Special education funding will be available to school districts, charters and ESDs within the contract with ODE and dependent on the number of students eligible to receive special education services.

## Are approved recovery schools required to be accredited?

Yes. All approved recovery schools in Oregon are required to be accredited by the Association of Recovery Schools (ARS). Typically, schools seek accreditation after their third year of operation. It will be a requirement for ongoing operation to be accredited by the fifth year of operation and maintain accreditation status in subsequent years.

## Where can I learn more about recovery high schools?

- Oregon Department of Education : Recovery Schools
- Association of Recovery Schools
- Oregon Recovery High School Initiative (ORHSI)

## What if I have more questions?

- For additional questions on these or other topics, please email: ode.recoveryschools@ode.oregon.gov

**581**-014-0001

Definitions for Student Investment Account

The following definitions apply to OAR 581-014-0001 to 581-014-9999:

(1) “ADMw” means the extended weighted average daily membership computed as provided in ORS 327.013(1)(c).

(**2**~~1~~4) ~~Effective July 1, 2023,~~ “Economically **D**isadvantaged **S**tudents” means students who meet one or more of the following qualifications:

(a) are participating in Supplemental Nutrition Assistance Program funded by the United States Department of Agriculture;

(b) are participating in the Temporary Assistance for Needy Families program as defined in Title IV of the Social Security Act;

(c) are foster students;

(d) are **migratory**~~migrant~~ students; or

(e) are students who are homeless ~~or have experienced homelessness~~.

(**3**~~2~~) “Eligible Applicant” means an applicant as defined in ORS 327.185(1) including YCEP and JDEP programs.

(**4**~~8~~) “Foster Students” as defined in ORS 30.297(5)(c).

(**5**~~12~~) “**Justice Involved Youth** ~~Students with Experience of Incarceration or Detention~~” means a student who is **pre or post adjudication, been or currently detained in a secure juvenile justice facility, and/or been or currently placed in a community juvenile justice program** ~~serving a criminal sentence in a correctional institution or who is detained in a detention facility prior to adjudication~~.

(**6**~~9~~) “LGBTQ2SIA+ Students” means students who ~~identify as Lesbian, Gay, Bisexual, Transgender, Queer/questioning, Two-Spirit, Intersex, or Asexual~~ **may have one or multiple gender identities and/or sexual orientations including lesbian, gay, bisexual, pansexual, transgender, nonbinary, queer, questioning, two-spirit, intersex, and asexual. The plus sign (“+”) recognizes and includes the myriad ways to describe marginalized gender identities and sexual orientations.**

(**7**~~11~~) "**Migratory** ~~Migrant~~ Students" means a student **who is a migratory worker or** whose parent or guardian is a migratory worker in the agricultural, dairy, lumber, or fishing industries and who has moved **due to economic necessity** between school districts in the last **thirty six months,** ~~three years~~ **and is eligible to be a part of the Title 1-C Migrant Education Program**.

(**8**~~3~~) "Spring Membership" means the data report that represents students attending public schools and programs on the first school day in May, as derived from the 3rd period cumulative average daily membership collection. Rules governing the Spring Membership report are contained in the most recent edition of the Oregon Student Membership Manual, published by the Oregon Department of Education.

(**9**~~10~~) "Students Recently Arrived" means a student who was NOT born in any state or US Territory and who has not been attending one or more schools in any one or more state for more than three full academic years.

(**10**4) "Students from Racial or Ethnic Groups that Have Historically Experienced Academic Disparities" includes, but is not limited to American Indian and Alaska Native **(AI/AN and AI/AN+)** students, Black and African American students, Hispanic and Latino students, Asian students, Native Hawaiian and Pacific Islander students, and multiracial students, and any other racial or ethnic group identified by the school district as historically experienced academic disparities.

(**11**~~5~~) "Student Investment Account" means the account as established in ORS 327.175.

(**12**~~7~~) "Students who are **H**omeless" has the same meaning as in section 725 of the McKinney-Vento Act, 42 USC § 11434a (2).

~~(13) Effective until June 30, 2023, "Economically disadvantaged students" means students who are eligible for free or reduced priced lunch under the United States Department of Agriculture Income Eligibility Guidelines.~~

**(13) "Students who are Pregnant, Parenting, and/or Students who Experience any Pregnancy-related Condition" means students who are pregnant for any length of time, or who are actively caring for a child, whether biologically related to them or otherwise. This includes students with pregnancy-related conditions, including, but not limited to loss or termination of a pregnancy, childbirth, lactation, and/or mental health conditions.**

(**14**~~6~~) "Students with Disabilities" means a child with a disability as defined in ORS 343.035(1).

581-014-0019
Community Engagement

(1) For the purposes of a Student Investment Account Grant Application eligible applicants must show input in the strategic planning process as set forth in ORS 327.185 (6)(b). As part of that input, eligible applicants should engage, to the extent possible, with focal group students and families, including:

(a) Students from racial or ethnic groups that have historically experienced academic disparities;

**(b) Students who identify as American Indian/Alaska Native, alone or in combination with other races and ethnicities, and are enrolled members of federally-recognized tribal nations**

(**c**~~b~~) Students with disabilities;

(**d**~~c~~) Students who are navigating houselessness;

(**e**~~d~~) Students in foster care;

(**f**~~e~~) Economically disadvantaged students;

(**g**~~f~~) Students who may identify as LGBTQ2SIA+;

(**h**~~g~~) Students recently arrived;

(**i**~~h~~) **Migratory** ~~migrant~~ students;

(**j**~~i~~) Students **navigating the justice system** ~~with experience of incarceration or detention; and~~

(**k**~~j~~) Emerging bilingual students**; and**~~.~~

**(l) Students who are currently pregnant and/or parenting.**

(2) Applicants may also identify other student groups to include for the purpose of input in the strategic planning process set forth in ORS 327.185 (6)(b) that meet the following criteria for students that have experienced historic and current academic disparities resulting from:

(a) Immutable characteristics;

(b) Socio-economic status;

(c) **Bias against the student's** Cultural or Ethnic Background;

(d) Disability;

(e) ~~Students experiences~~ **Barriers to accessing education due to** mental or behavioral health **challenges** ~~barriers~~;

(f) Or any combination thereof.

(3)(a) Focal groups identified in sections 1 and 2 above not captured in current ODE data collections may, but shall not be required to, be included in the development of the Longitudinal Performance Growth Targets as defined in ORS 327.190 (3).

(b) As data is required to be collected that may further identify focal group students as delineated above those groups shall then be included, to the extent possible, in the development of Longitudinal Performance Growth Targets.

## Oregon State Board of Education
## April 18, 2024

AGENDA ITEM: 4.C.

| | |
|---|---|
| **SUBJECT:** 581-014-0001 Definitions for Student Investment Account & 581-014-0019 Community Engagement<br>**STAFF NAME & OFFICE**: Blake Whitson, Office of Education Innovation and Improvement<br><br>This rule amendment provides further clarity to the SIA Focal Student Group Definitions and alignment with the Student Success Act statewide Student Success Plans.<br><br>☐ New Rule<br>☒ Amend Existing Rule<br>☐ Repeal Rule | ☐ **First Reading**<br>☐ **Presentation**<br>☐ **No Presentation**<br>☒ **Action**<br>☐ **Temp Rule**<br>☒ **Presentation**<br>☐ **No Presentation** |

**BACKGROUND**

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

1. History:

The Student Investment Account (SIA) was authorized in ORS 327.175 and creates a non-competitive grant program for school districts, eligible charter schools, and expands to include Youth Corrections Education Programs (YCEPs) and Juvenile Detention Education Programs (JDEPs) with the passage of HB 2060. The grants are established for two specific purposes including: (1) meeting students' mental or behavioral health needs and (2) reducing academic disparities and increasing student achievement for specific groups of students that have historically experienced academic disparities.

The board adopted tempory rules for the Student Investment Account in fall of 2019 with permanent adoption in the spring of 2020. Following the initial implementation of the Student Investment Account, it was determined that there were three distinct needs for definitions for focal groups (1 - determination of charter school eligibilty, 2 - community engagement, and 3 - Longitudinal Performance Growth Targets). At the time, only one of those functions was defined in rule. The department proposed and expanded set of rules adding additional focal groups to the definitons as well as establishing the three structural areas the definitions are used in. These definitions were adopted in late 2022. Following the adoption of those rules the department continued to review the focal group definitions for further alignment with the Student Success Act (SSA) statewide Student Success Plans (SSPs) and equity based language.

2. Purpose

To ensure alignment between focal group definitions and the SSA statewide SSPs and other programs and initiatives of the department.

Specifically, ODE is proposing the following changes to the Definitions for SIA rules:

- We have updated a number of the definitions to better align with the statewide student success plans and definitions used in those plans. We have also adjusted some definitions to be rooted in more strength and asset-based language. And finally we added a new definition for pregnant and parenting students.

- Alphabetized the definitions

3. Does the board have any areas of discretion or is this strictly mirroring statute?
The legislature defined certain focal groups in rule, but gave the board the authority to define and add additional focal groups in rule. Therefore the board has discretion in establishing and defining additional focal groups in rule.

4. Stakeholder voice/input (individual and collective i.e., groups)
The department has engaged internal staff working on the various SSA statewide SSPs and other initiatives to provide input into these proposed rule updates to ensure alignment across initiatives. Some of the proposed updated definitions were also shared with various advisory groups working on the SSA statewide SSPs for input.

The department also presented these revised definitions to the ODE Rules Advisory Committee for consideration and input into additional defined focal groups. The initial rules concept was shared at the November 2023 meeting, prior to the draft rules being shared at the January and February 2024 meetings. Overall the feedback on the proposed rule updates was very positive and in support of the changes. The department received feedback from Talented and Gifted (TAG) advocates about the inclusion of TAG Students as a focal group. However, the department continues to believe that the inclusion of TAG students as a focal group does not align with the spirt or the intent of the SIA – a view that is supported by COSA and other advocates as well.

**Commented [RM1]:** Add in the high level information on what is changing in the proposed rules

**Commented [RM2]:** Add in the months for the specific RAC meetings that we went to

**SUMMARY OF PREVIOUS BOARD ACTION**

1. The board has previously adopted rules regarding the SIA definitions of focal group students as well as defining the three structual areas in which the rules are utilized. During the prior board presentaton, the department indicated continued work to align definitions across programs and the SSA statewide SSPs as applicable.

**HAS THE RULE CHANGED SINCE LAST BOARD MEETING?**

☐ N/A; first read—hasn't been before board
☐ No; same as last month
☒ Yes – As follows: The rule language is the same but the definitions have been placed into alphabetical order

**POLICY ISSUE OR CONCERNS**

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

1. Stakeholders
    a. The department has engaged with additional ODE staff working on SSA Statewide Student Success Plans and other ODE programs to ensure focal student group definitions align across the programs and plans to the greatest extent possible. In

addition, the department has worked with the ODE Rules Advisory Committee to gather additional feedback into the proposed rule updates.

2. Negative/Positive Effects
    a. The proposed rules add clarity to the focal student groups that district are required to engage with as part of the planning and plan development processes. These proposed rules continue to build upon the core purpose of the Student Investment Account by centering equity and improving outcomes for students who have historically experienced academic disparities. The department will continue to revise the definitions to ensure that students and communities are being engaged and considered as part of district plans. In addition, the department is proposing to add an additional focal group of students - students who are pregnant, parenting, or experiencing pregnancy related conditions.
3. What are the barriers to more equitable outcomes, either:
    a. The aim of these rules is to further reduce barriers to equitable outcomes by aligning the definitions for focal group students across plans and programs.

**EQUITY IMPACT ANALYSIS**

These proposed rules further center equity, which is at the heart of the Student Investment Account, by expanding the definitions of focal student groups that are required to be engaged by districts, eligible charter schools, YCEPs, and JDEPs as part of their planning and plan development processes. This will provide additional perspectives of students groups that have historically been marginalized, adding their voices, input, and identified needs to the planning and plan development processes.

**FISCAL ANALYSIS**

The fiscal impact to school districts, schools, YCEPs, and JDEPs is minimal to non-existent given applicants are already engaging student focal student groups and their families. With the passage of this rule set, they would be required to expand to engage with an additional focal student group and their families. SIA grantees are also allowed to use SIA grant funds to support their ongoing engagement.

**EFFECT OF A "YES" OR "NO" VOTE**

The impact of a yes vote on these rules will align the SIA focal group definitions with other definitions in rule related to the SSA statewide Student Success Plans and other programs administered by the department.

Should the board vote no, then the additional identified focal student group would not be added to the administrative rules for the SIA and definitions will not align with other initiatives.

**STAFF RECOMMENDATION**

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

**Oregon State Board of Education**
**April 18, 2024**
AGENDA ITEM: 4.C.
**ATTACHMENTS**

Attachment 1: 2.23.24 - SIA Rules Alphabetized

# Oregon State Board of Education
# April 18, 2024
AGENDA ITEM: 4.D.

| | |
|---|---|
| **SUBJECT:** CTE State Plan 2024-2027<br>**STAFF NAME & OFFICE**: Jennell Ives, EII; Shalee Hodgson, CCWD<br><br>Oregon, as part of federal requirements to receive Perkins CTE funding, has refined the CTE State Strategic Plan for 2024-2027. The State Board of Education must approve Oregon's CTE plan before submission in May 2024 to the US Office of Career, Technical and Adult Education for federal approval. | ☒ **Adoption**<br><br>☐ **Written Report** |

**BACKGROUND**

The State Board of Education last approved the Oregon CTE State Plan in 2020. Federal funding for career education has a long history, beginning in 1917 with the Smith-Hughes Act. Perkins was originally passed as the Vocational Education Act of 1963 and renamed the Carl D. Perkins Act in 1984 and most recently referred to as Perkins V. Its purpose is to increase access to high-quality career and technical education programs focused on underserved students. These federal funds are provided to states on a formula basis to supplement state funding and facilitate improvement, innovation, and connections between secondary and postsecondary education and employers.

Since the initial adoption of the STE State Plan, Oregon has made strides to enhance CTE programs and align them with workforce development initiatives.

1. Work-Based Learning (WBL): Incorporating work-based learning as a quality indicator for secondary CTE programs signifies a commitment to providing students with practical, hands-on experience in real-world settings, which is essential for preparing them for future careers.
2. Statewide CTE Programs of Study: The development of statewide CTE Programs of Study indicates a systematic approach to ensuring consistency and quality across CTE offerings throughout the state, which is crucial for student success and workforce readiness.
3. Career-Connected Learning Initiatives: These initiatives aim to broaden access to high-wage, in-demand careers by providing students with opportunities for awareness, exploration, preparation, and training programs. This approach helps to diversify participation in the workforce and aligns with broader economic development goals.
4. Connections with Workforce and Talent Development Board: Building stronger connections with the Workforce and Talent Development Board underscores the importance of collaboration between education and industry partners to ensure that CTE programs meet the evolving needs of the labor market.
5. CTE Advisory and Student Advisory Councils: Establishing CTE Advisory and Student Advisory Councils facilitates ongoing feedback and engagement from key partners, including industry professionals and students, to inform the development and improvement of CTE programs.
6. Alignment with Oregon's ESSA Plan: By promoting well-rounded education and enhancing students' sense of belonging, Oregon's CTE initiatives are aligned with broader education goals outlined in the state's Every Student Succeeds Act (ESSA) plan.

7. Integration of CTE Perkins Application: Including the CTE Perkins Application as part of the Integrated Application streamlines the application process for secondary schools and ensures that CTE funding is effectively utilized to support program enhancements and improvements.

Overall, these efforts reflect a comprehensive approach to strengthening CTE in Oregon and preparing students for success in the workforce and beyond.

We are now presenting Oregon's revised CTE State Plan for your adoption. We must submit the plan to the US Office of Career, Technical, and Adult Education (OCTAE) for federal approval by May 2024.

**Community voice/input (individual and collective i.e., groups)**

The Perkins V federal law requires Oregon to engage the following partners during plan development and setting of state-determined performance levels:

- Representatives of secondary and postsecondary CTE programs,
- Adult CTE providers,
- Charter school representatives,
- Interested community representatives, including parents, students, and community organizations,
- Representatives of the State Workforce Development Board,
- Members and representatives of special populations (as defined in Perkins Law),
- Representatives of business and industry (including representatives of small business),
- Representatives of agencies serving out-of-school youth, children, and youth experiencing homelessness, and opportunity youth, including the State Coordinator for Education of Homeless Children and Youths,
- Representatives of Indian Tribes and Tribal organizations located in, or providing services in, the State and
- Individuals with disabilities

All the required community members played a role in shaping the 2024-2027 CTE State Plan. The state consulted with over 1,000 CTE partners, including students and families/caregivers, tribal leaders, educators, administrators, regional coordinators and grant managers, advisory council/board members, and business, industry, and workforce development partners and community-based organizations, to help develop the new four-year CTE strategic plan. Below is a summary of the responses.

- Students wanted more CTE courses, teachers, and wrap-around support, such as advising and industry opportunities.
- Tribes, caregivers, and families wanted more career exploration offered in middle schools and targeted marketing campaigns to increase exposure and opportunities for students and families, particularly in underserved populations.
- Educators and administrators expressed a need for sustainable, consistent funding to support existing and future CTE Programs of Study, including industry-identified equipment, educator prep time, and professional development.
- Workforce partners desire more funding for data sharing and alignment between education and workforce development.

- Oregon Tribes indicated a need for more CTE access (especially in remote rural locations), better ways to connect with families and communities about those opportunities, and to have a voice in the development of these programs.
- Across the board, partners and Tribes expressed the need for more funding to support a strong CTE regional coordination and leadership structure, targeted resources for small/rural schools, more communication and marketing of CTE and the opportunities available for students, and the ability to effectively support the growth and maintenance of CTE programs, pathways, and opportunities that lead to high-wage, in-demand careers in Oregon.

In addition to ongoing engagement through the past three years, the engagement around the revision of Oregon's CTE State Plan was conducted in four phases:

- **Phase 1 Listening Sessions:** April – September 2023 priorities of key partners and community members
- **Phase 2 Review and Synthesis**: September – October 2023 review and synthesis across multiple sources
- **Phase 3 Focal Audience Engagement and Feedback**: September – December 2023 feedback and input using survey, webinar, and in-person presentations.
- **Phase 4 Public Comment:** February -April 2024 public comment open
- **Phase 5 Adoption of Pan**
- **Phase 6 Communication and Implementation Plan**

Of particular note is the involvement of more youth, students, and community organizations in the engagement sessions than were involved during the development of the 2020 state plan.

## SUMMARY OF PREVIOUS BOARD ACTION

The Board adopted the Oregon CTE State Plan 2020-2024 in spring of 2020. The Board was presented with the CTE State Plan at the February 2024 State Board meeting. The Board is now asked to adopt Oregon's CTE Strategic State Plan 2024-2027, including new State Determined Performance Targets for submission to the US Office of Career, Technical, and Adult Education (OCTAE) for federal approval in May 2024.

## POLICY ISSUE OR CONCERNS

**Community Members:**
State Agency staff conducted 42 specific, intentional listening sessions, including sessions in Spanish, with required community partners between July and November, with over 1,000 individuals from these groups providing specific input on the development of the CTE State Plan. There was also an in-depth survey developed in partnership with Advance CTE, a national advocacy group, sent to targeted partners, with almost 300 respondents. Career connected learning (CCL) has been part of the state work since 2020 and Oregon was able to leverage recovery funds through ESSER to create positions and accelerate the launching of CCL in Oregon. ODE hired a CTE/Career Connected Learning Tribal Liaison. She has worked closely with the Office of Indian Education to build strong relationships with the 9

Federally Recognized Tribes in Oregon to listen to their priorities for CTE and career connected learning. The CTE State Plan has a particular focus on actions to further the interests of these 9 sovereign nations.

**Negative/Positive Effects:**
There exists a large body of research around the benefits of career and technical education. Students who take 1 to 2 years within a CTE Program of Study graduate at higher rates, are equally likely to enroll in college and earn higher incomes 6 years after high school graduation. These benefits are often greatest for focal student groups. Recent studies have also shown positive impacts of career connected learning and CTE on students' mental health as well as increasing the likelihood of family satisfaction in their students' school.

The current low unemployment rate and contraction in Oregon's population make CTE an important component of not only Oregon's education system, but a means to improve equitable workforce development and support of Business and Industry vitality. CTE and CCL in high school are the lowest cost means for youth to explore their interests, talents, and develop their career identity.

The CTE State Plan identifies opportunities for focused support to school districts, colleges, community partners and regions to improve the quality and consistency of CTE in the state. It also continues the important work of integrating career connected learning into our education and workforce development system to expand access and opportunities to high wage in-demand occupations.

There do continue to be barriers to equitable outcomes in the state.

1) Dedicated funding for maintenance of career technical education continues to hamper the ability of regions to develop the Programs of Study needed in in-demand occupations such as Healthcare, Information Technology, and Advanced Manufacturing.
2) Clear communication and structures that support the integration of career connected learning and CTE into all school systems do not yet exist everywhere
3) Scheduling and access to CTE programs for students who could benefit the most continues to be a barrier to equitable access.
4) Mindsets and prejudice about CTE continue to influence discussions with students about course selection.
5) Rural access remains an ongoing issue.

**EQUITY IMPACT ANALYSIS**

Students who take 1 or more years of career technical education graduate at higher rates. CTE concentrators, those taking 2 years in a single CTE Program of Study, have graduation rates of 95%, well above the state average. Improved graduation rates are true across all student demographics. Since 2020, CTE programs have been working toward including work-based learning (WBL) opportunities for students. Oregon has one of the most equitable participation in WBL in the country. Work-based learning not only helps students develop employability and professional skills, but it also helps students create a professional network that opens doors to opportunity. CTE, career connected learning, and intentional connection of students to professionals is a key strategy for creating a more equitable society. Of note is for many of our focal student groups participation in Work-based learning is high

with Native Hawaiian/Pacific Islander student CTE Concentrators having the largest percentage participation in WBL experiences for any of our student groups.

There exist inequities in access for focal student populations to become CTE concentrators. Some of the issues raised during community engagement include a lack of communication about opportunities and benefits of CTE to families, limited offering of CTE programs in some schools, conflicts in scheduling and lack of information from educators around the benefits of CTE. The CTE State plan will prioritize efforts and funding to reduce these barriers. Recent research also shows a link between career connected learning and student well-being and there are many intersections with the transformative social emotional learning standards and employability skills. Infusing career connected learning and more CTE opportunities into our education system will benefit all students but provide particular benefit to students who are marginalized.

There were very few public comments on the draft plan. Comments about metrics of success and student math performance have been addressed in this final version.

**FISCAL ANALYSIS**

Successful approval by OCTAE of Oregon's CTE State Plan is required for Oregon to receive roughly 17 million in annual federal Perkins funds. The proposed state plan impacts the work of ODE, HECC, school districts, ESDs, community colleges, and other CTE partners including business and industry, workforce boards, community organizations, families and youth.

The CTE State Plan does not impact the agency's budget, though Perkins does require a match of administrative funds and a maintenance or growth of existing support for CTE. The new plan does require a commitment of the agency to support CTE and work toward greater integration of career connected learning within the agency's priorities.

**ATTACHMENTS**

Attachment 1: Oregon CTE State Plan 2024-2027

*D R A F T* | 2024 – 2027

# Oregon's CTE State Plan

*Oregon Department of Education*
*In partnership with the*
*Oregon Higher Education Coordinating Commission*

OREGON DEPARTMENT OF EDUCATION

*Oregon achieves . . . together!*

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## Structure of the CTE State Plan

Oregon's vision for Career and Technical Education (CTE) guides the structure of our State Plan. Ongoing consultation and coordination between the Oregon Department of Education (ODE) and the Higher Education Coordinating Commission (HECC), in partnership with local education entities, other agencies, and Oregon's communities, have been key to the growth and changes CTE has experienced since 2020. This revision of Oregon's CTE State Plan is meant to be a high-level, four-year strategic plan outlining outcomes and strategies to guide Oregon's ongoing work to build world-class CTE. The appendices provide the context and details of the plan and how Oregon will meet federal Perkins requirements. The appendices also include an action plan aligned to Advance CTE's National CTE Without Limits Framework and will guide priorities over the coming years. This action plan serves as one means to measure the state's progress, in combination with others, including CTE data, number of programs, and connections with business and industry. The action plan and progress reports will be updated each summer and posted on the ODE website.

## Building Equitable Aligned Career and Technical Education (CTE)

Education and workforce development are the cornerstones of building an equitable economy and community. In an ever-evolving global landscape, where access to opportunities and resources are not distributed equally, career connected learning (CCL) and career and technical education (CTE) play a crucial role in bridging the gaps between education and workforce, as well as influencing who has access and opportunity to benefit from these systems. CCL and CTE can help level the playing field. Education with multiple pathways that empower individuals with knowledge, skills, and opportunities to develop career identity and build a network of professional connections can serve as a catalyst for upward mobility. CCL and CTE strengthen communities and form the foundation upon which Oregon can construct a society where everyone has the chance to make an impact and thrive.

*The CTE State Plan focuses on more fully integrating academic knowledge, professional/employability skills, and technical ability for all learners, ensuring that historically and currently marginalized populations have the support needed to feel welcome and be successful in the CTE program of their choice.*

The authorization of the Strengthening Career and Technical Education for the 21st Century Act (Perkins V) allowed Oregon CTE leaders and partners to collaborate on developing a CTE State Plan in 2020. The CTE State Plan has been updated to be more than a Perkins plan; it is Oregon's guide to building equitable CTE pathways and prioritizing our career-related learning resources. This plan supports a future-ready Oregon workforce and aligns with the Workforce and Talent Development Board's focus on workforce readiness by aligning CTE and the skills needed to succeed in the workplace beyond those learned in academic settings. In Oregon, these are known as Essential Employability Skills.[1]

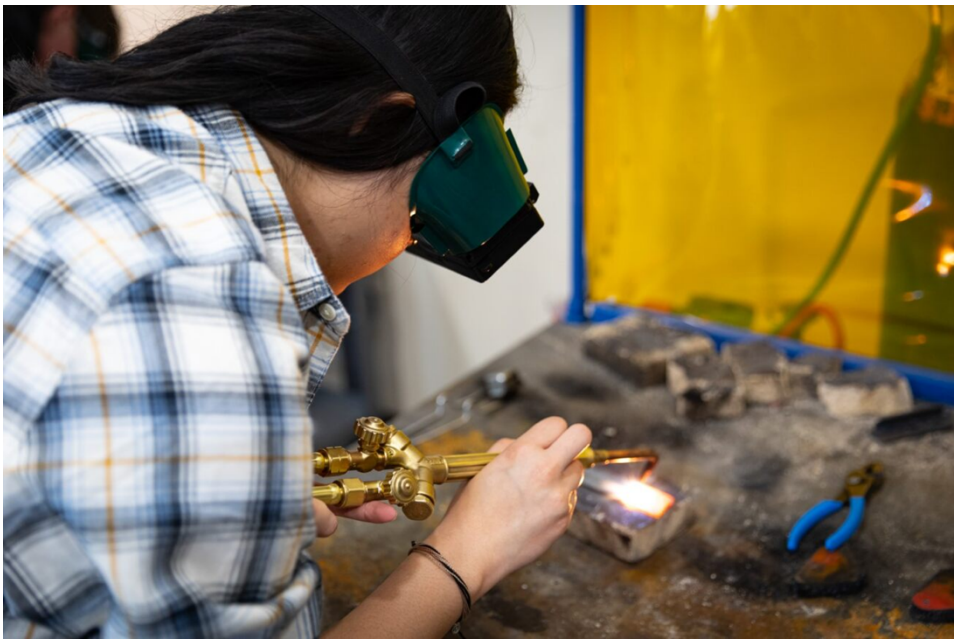
As we have worked to revise this plan, agencies have been collaborating to align CTE with other federal initiatives, including the Every Student Succeeds Act, Workforce Innovation and Opportunity Act (WIOA), Higher Education Act, and the Individuals with Disabilities Act. Oregon state staff worked closely together to coordinate and align the development of the CTE and WIOA state plans. There are increasing partnerships and coordination in the joint work as one of Oregon's WIOA Joint Priorities is to: "Concretely deepen the integration of K-12 education in the entire workforce system." CTE also connects to other WIOA joint priorities around the transition of adults to credit-bearing CTE through Integrated Education and Training models, Career Pathways, Credit for Prior Learning, career connected learning, and work-based learning opportunities. The CTE State Plan supports the Oregon Business Plan by building systems to prepare Oregonians for the jobs of today and tomorrow and by ensuring alignment of CTE programs with labor market needs.

By 2027, Oregon will make progress on achieving three overarching outcomes:

1) Career connected learning that is systemically integrated with education and workforce development,
2) Increased equitable participation in high-quality CTE and career connected learning, and
3) Expanded communication, transparency, and diversity of voices and contributors connected to education and workforce development partnerships.

[1] Oregon Workforce and Talent Development Board - Final Report, Essential Employability Skills Task Force. December 2020

Oregon CTE programs, with the support of state agency staff, CTE regional leaders, STEM leaders, educators, faculty, administrators, community partners, Tribes, workforce development agencies, and business and industry partners, will ensure that historically and currently underserved and marginalized students and families feel welcome, safe, and included in our institutions and programs. The goal is that all Oregonians will receive appropriate and equitable access to and benefits from CTE and career connected learning. Our priority is to create quality relationships, experiences, and interactions among learners, educators, business partners, and community members.



*Salem-Keizer student works on a soldering project*

## Oregon's Vision for CTE

Oregon's CTE State Plan will highlight Oregon's shared vision for CTE, outcomes that the state is working toward, and actionable strategies for working together to achieve that vision. All Oregonians deserve meaningful living wage careers, access to opportunities to learn about career opportunities, and to receive training to develop the skills necessary to secure these careers and contribute to their communities. With an intentional focus on equity and removing barriers to ensure high-quality learning and access for each learner regardless of race, gender, or zip code, the state can realize the full potential of each of our talented residents. CTE is a proven strategy that increases educational outcomes and grows a skilled workforce.  CTE is critical to creating a more equitable and prosperous future for Oregon.

## Vision for CTE

Building on CTE's past vision and based on input from CTE partners and agency staff, Oregon has identified the following vision for CTE that will guide Oregon's CTE State Plan:

***Oregon will reimagine and transform learner experiences to enhance learners' future prospects, empower their communities, and ensure equity in an inclusive, sustainable, innovation-based economy.***




*Photo Courtesy of Klamath Community College Diesel and Automotive program*

## Oregon CTE Today

With the CTE State Plan, Oregon has an opportunity to improve how we prepare Oregonians to succeed in high-wage, high-skill, and in-demand careers[2] and, in doing so, put the state on a path to an even brighter future for our communities and our economy. More specifically, we have an opportunity to continue to remove barriers and ensure high-quality learning and access for each learner regardless of age, race, gender, or zip code. More than 184,000 K-12 learners participate in CTE, and over 7,000 CTE degrees and certificates were awarded at Oregon community colleges (Figure 1). Regional partnerships, led by CTE Regional Coordinators, exist in every corner of Oregon. CTE Programs of Study exist in nearly every Oregon high school and all 17 community colleges. Secondary students who concentrate in CTE

[2] Defined in Glossary, Appendix J: CTE State Plan Glossary.

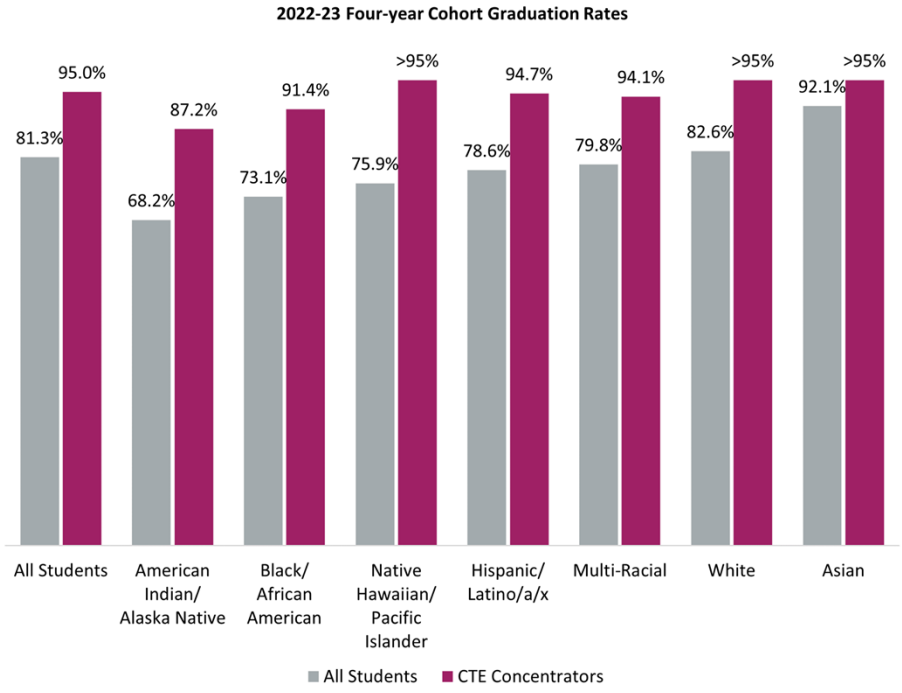
graduate high school at rates higher than their counterparts who do not participate in CTE (Chart A); this finding holds true across all demographics but is even more significant for historically and currently underserved and marginalized students. The CTE State Plan will build on the success of the past and improve programs to bring greater consistency and access.



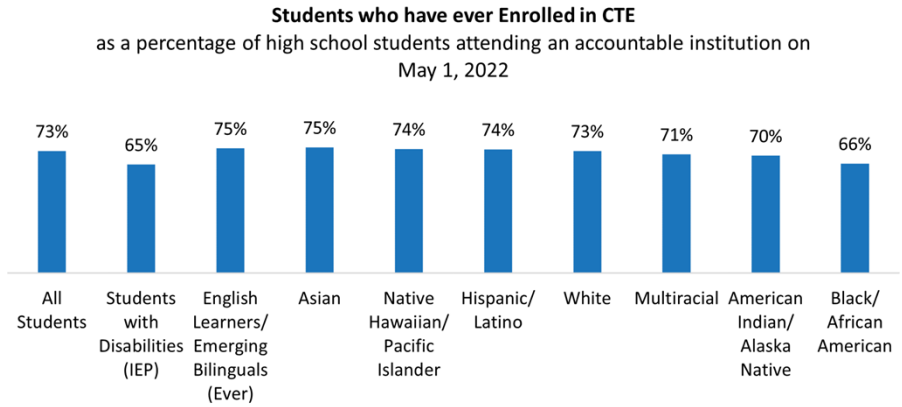

Figure 1: CTE participation and outcomes

**Commented [1]:** May be able to fit a quote here

## Chart A: High school graduation and CTE

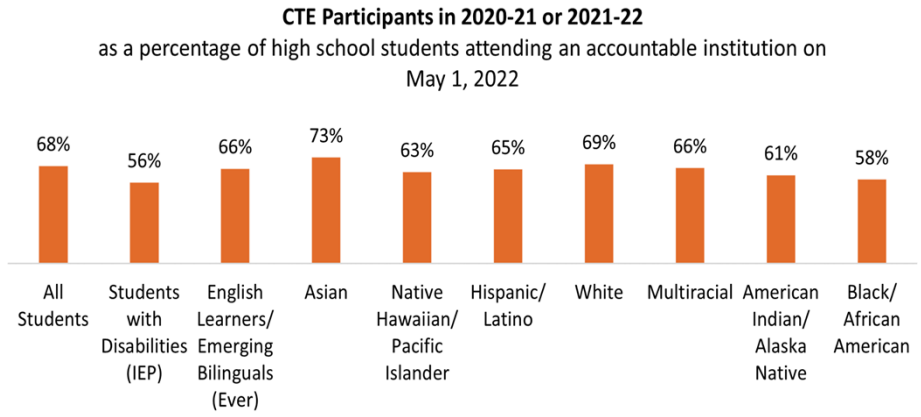



## Chart B: High school enrollment in CTE



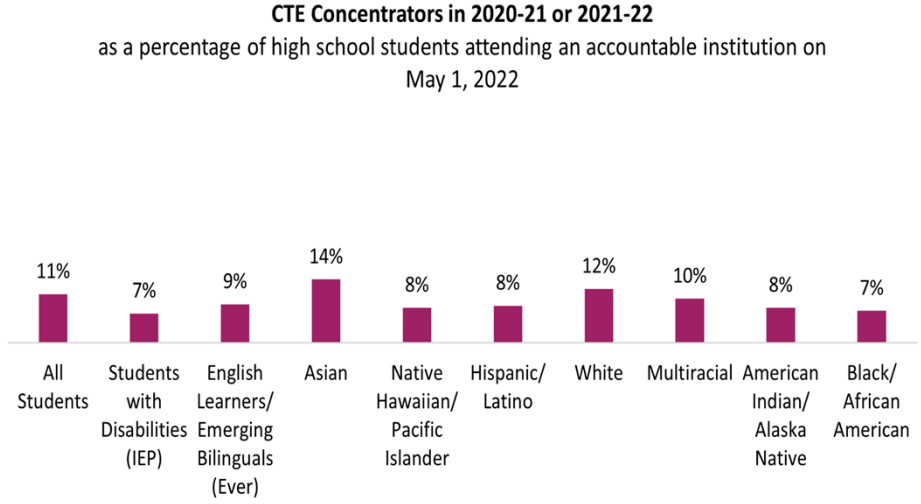

Note: "Ever" Emerging Bilinguals includes students who currently or previously were eligible to participate in an English Language Development program.

## Chart C: High school CTE participants in 2020-21 or 2021-22




Note: "Ever" Emerging Bilinguals includes students who currently or previously were eligible to participate in an English Language Development program. Participants also include concentrators.

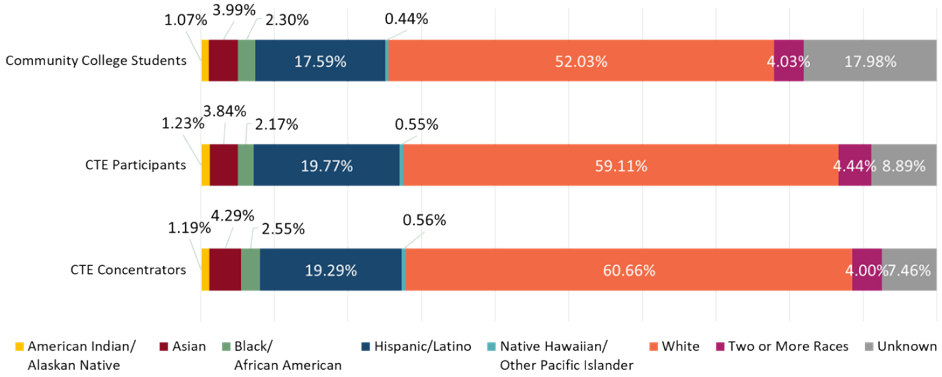
## Chart D: High school CTE concentrators in 2020-21 or 2021-22




Note: "Ever" Emerging Bilinguals includes students who currently or previously were eligible to participate in an English Language Development program. Participants also include concentrators.

CTE can celebrate the fact that enrollment rates are similar across demographic groups, though gaps remain for some focal populations, and the consistent achievement of higher graduation rates across all student groups taking one year of CTE in high school. However, a closer look at the data shows that students of color, students with disabilities, and emerging bilingual students are underrepresented in obtaining CTE concentrator status (in-depth CTE as shown in Charts B-D). In postsecondary CTE, most historically underrepresented race/ethnicity groups participated in CTE at higher rates than the overall community college student population, and Hispanic/Latino students were represented at higher rates in CTE programs (Chart E). The recent Regional Education Laboratory report highlights these opportunity gaps, but as an example, in the Business and Management Career Cluster®, a greater percentage of students who are not on an Individual Education Plan (IEP) and not emerging bilingual concentrate in a CTE program and complete three credits in the program (see Chart F).

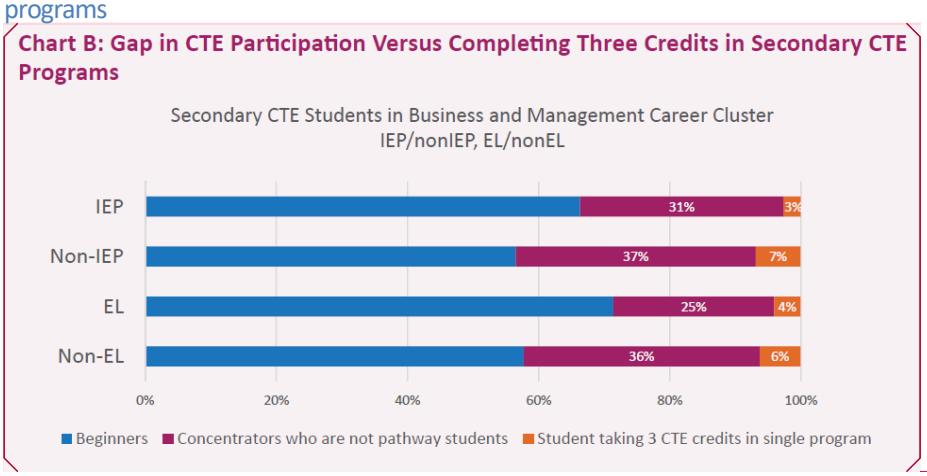
## Chart E: Postsecondary CTE participants and concentrators by race and ethnicity compared to overall community college student population (2022-23)




These findings are significant because greater benefits of CTE in terms of graduation, college success, and smooth transitions into a career are associated with in-depth participation. Far too often, students of color, students with disabilities, and emerging bilingual students are not benefiting from the promise of CTE at the same level as students who are white, not experiencing poverty, or don't identify as having a disability. Chart F shows the range of CTE secondary participation from one course to three credits for students with disabilities (IEP), emerging bilingual students (EL), and students who are not members of these groups. There is a clear gap in the percentage of students taking more CTE courses for these two student groups. We see a similar gap in postsecondary, where students with disabilities are less likely to become CTE Concentrators, but English Language Learners are more likely to become Concentrators (Chart G). Understanding how all of our learners fit into the learning environment and supporting them accordingly is necessary to achieve our vision.

**Commented [2]:** Chart F

## Chart F: Gap in CTE participation versus completing three credits in secondary CTE programs

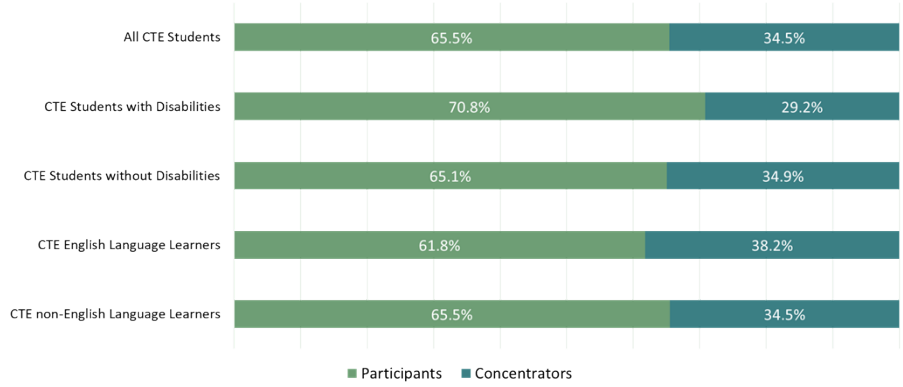



**Commented [3]:** New graph will be created when new data is released

**Commented [4R3]:** what timeframe should this look at? I see it is compared above with chart G which specifies program year 2022-23 students. The other Secondary CTE charts specify varying program years or ranges.

**Commented [5R3]:** If you have data for 2022-23 that is great, if not 2021-22 works.

## Chart G: Postsecondary CTE student persistence to Concentrator status 2022-23




Students with disabilities experience better retention and post-school outcomes when they participate in one credit of CTE compared to students with disabilities who are not involved with CTE (Chart F). Oregon has been working to promote career connected learning and CTE and to purposefully remove barriers that exist for students with disabilities to persist within a CTE Program of Study. The Oregon Department of Education (ODE) partners with vocational rehabilitation and student services and will focus on communication and support to encourage school structures that improve access for students with disabilities in CTE. Oregon's community colleges also have strong partnerships with vocational rehabilitation, and 11 of these colleges are participating in the Inclusive Career Advancement Program (ICAP). This program helps people with disabilities obtain the training they need to find a pathway to a

career, not just a job. Through individualized support, ICAP opens the door to a living wage and a lifetime of career advancement potential. ICAP is a grant-funded program through the U.S. Department of Education supported by Cornell University and Portland Community College.

Additionally, too often, participation rates vary by gender in specific Programs of Study. For example, female-identifying students are underrepresented in Computer Science and Manufacturing programs, and male-identifying students are underrepresented in Education programs. Over the past six years, Oregon has partnered with the National Alliance for Partnerships in Equity (NAPE) to train regional cohorts of instructors and advisors to identify and overcome barriers to success. Oregon will continue to support strategies to address gender inequities by sponsoring recruiting events, providing statewide training, and using state leadership funds to support regional and local evidence-based programs.

During an annual review process, ODE will work with partners to monitor the performance and participation of all students. In the event any of the performance elements fall short, state-level improvement plans will be developed and monitored to ensure intentional steps are taken to address any gaps in performance.

Additionally, state staff will continue to offer professional development on providing accommodations for students, monitor access through the Methods of Administration plan, and provide grants to local education entities to use to increase equitable training in career areas dominated by a particular gender.

## Achieving Our Vision



*Photo Courtesy of Clatsop Community College Fire Science Program*

Implementing Oregon's CTE State Plan and disrupting current program, participation, and outcome inequities requires workforce development, higher education, K-12, and business and industry to align our work and support our common goals. Oregon continues its commitment to improved systems alignment and equity.

> *"Career and Technical Education is foundational to thriving communities. There are very few skill-based services that don't require training in some form of CTE. As Central Oregon continues to grow and our economy diversifies, CTE helps ensure our local businesses have the workforce they need today—and long into the future."*
>
> **~ Dr. Laurie Chesley | President, Central Oregon Community College**

ODE collaborates extensively with both internal and external partners to enhance the prominence of Career and Technical Education (CTE) as a pivotal component of school improvement initiatives. As a result, the CTE/Perkins application process has been integrated with other grant programs into a comprehensive application framework.[3] This integrated approach encourages schools, districts, colleges, and regions to adopt a broader perspective on how CTE can contribute to student growth and success by engaging with all constituents and community members to conduct a comprehensive needs assessment that is inclusive of CTE/Perkins requirements. Internally, the CTE staff has been strategically incorporated into the Office of Education Innovation and Improvement, fostering close collaboration with teams dedicated to expanding access to CTE and college-level opportunities, improving student attendance, supporting student mental and behavioral health, improving academic performance, reducing disparities, and other related initiatives. This concerted effort aims to provide robust support for our students, families, and communities while enabling schools and districts to act with greater coordination and braid multiple funding sources to achieve critical outcomes.

Oregon's CTE State Plan integrates with the broader priorities and goals of other Oregon plans, as orchestrating collective effort and investing together in Oregon's future is essential. A key step has been to build Oregon's CTE State Plan in alignment with the principles, commitments, and priorities laid out in Future Ready Oregon, Oregon's K-12 Education Plan, the Higher Education Coordinating Commission (HECC) Strategic Roadmap, the Workforce and Talent Development Board Strategic Plan, the Workforce Innovation and Opportunity Act State Plan, and the Oregon STEM Education Plan. One example is the direct connection to K-12 education in the Workforce Innovation and Opportunity Act State Plan Joint Priorities. "Concretely deepen the integration of K-12 education in the entire workforce system." Starting with connections like this, the next step to building coherence is a joint commitment to ongoing dialogue and partnership among offices and teams implementing the many interwoven strategic initiatives across the state. In particular, a cross-agency team will continue working together to support work-based learning across the state. This joint effort connects workforce investment and CTE priorities and is guided by the Workforce System Executive Team (WSET).

**Commented [6]:** will need to link to this once it is finalized

The state consulted with over 1,000 CTE partners, including students and families/caregivers, tribal leaders, educators, administrators, regional coordinators and grant managers, advisory council/board members, and business, industry, and workforce development partners and community-based organizations, to help develop the new four year CTE strategic plan. Below is a summary of the responses.

[3] Aligning for Student Success: Integrated Guidance for Six ODE Initiatives.

- Students wanted more CTE courses, teachers, and wrap-around support, such as advising and industry opportunities.
- Tribes, caregivers, and families wanted more career exploration offered in middle schools and targeted marketing campaigns to increase exposure and opportunities for students and families, particularly in underserved populations.
- Educators and administrators expressed a need for sustainable, consistent funding to support existing and future CTE Programs of Study, including industry-identified equipment, educator prep time, and professional development.
- Workforce partners desire more funding for data sharing and alignment between education and workforce development.
- Oregon Tribes indicated a need for more CTE access (especially in remote rural locations), better ways to connect with families and communities about those opportunities, and to have a voice in the development of these programs.
- Across the board, partners and Tribes expressed the need for more funding to support a strong CTE regional coordination and leadership structure, targeted resources for small/rural schools, more communication and marketing of CTE and the opportunities available for students, and the ability to effectively support the growth and maintenance of CTE programs, pathways, and opportunities that lead to high-wage, in-demand careers in Oregon.

Appendix A: Community Engagement Summary contains a comprehensive community engagement report.

*"Oregon is positioned to make additional progress in continuing to strengthen the relationship between CTE programs and the marketplace trends facing Oregon's employers. It's an exciting time to envision a future where barriers between educational institutions and real world employment opportunities can be broken down and addressed head on."*

**~ Jason Brandt | President & CEO, Oregon Restaurant & Lodging Association**

In 2020-2021, the state recruited partners to serve on an ongoing basis to advise the state on the implementation of the Oregon CTE State Plan, forming a standing CTE Advisory Council. The CTE Advisory Council identified three overarching priorities: Alignment, Equity, and Systems of Sharing/Communication.

Current Advisory Council membership composition includes

- 24 Standing Members
- 11 Business and Industry and Workforce Development Representatives
- 6 Secondary and Postsecondary Students

- 17 Ex Officio Members[4]
- 36% of Members Identify as Other than White[5]

More information about the Advisory Council, including the charter, the membership roster and meeting materials can be found on the Statewide CTE Advisory Council web page.

As Oregon implemented the 2020-2024 CTE State Plan and worked with the Advisory Council, it became clear that there was a need for an intentional effort to include student voices in this work. With that in mind, Oregon participated in the Advance CTE Leveraging Learner Voice to Strengthen CTE Cohort, and the state created a CTE Youth Advisory Council to ensure that learner voices are used to improve CTE policies and practices.



*Photo Courtesy of Mt. Hood Community College Healthcare program*

As state staff implement Oregon's CTE State Plan, they will ensure clear communication, partnership, tracking of progress, and continuous improvement. Staff will also provide guidance on braiding/leveraging funding and will work toward cross-agency funding opportunities. The Statewide CTE Advisory Council and the CTE Youth Advisory Council members will be invited to participate in guiding the work, holding the staff accountable for progress on the work plan, and serving as important advocates who communicate with their constituents about the work being done in CTE across the state.

[4] Representing ODE, HECC, Bureau of Labor and Industries, Workforce and Talent Development Board, Oregon Youth Works, High School Success, STEM Network, Future Ready Oregon, Career Connected Learning, and Work-based Learning.
[5] According to the US Census, 85% of Oregonians identify as White.

## Achieving Equity

Oregon's vision for CTE requires that learners have equitable opportunities for success. In light of this understanding, we will examine all policies, practices, and procedures using the SPST Decision Tool, ODE's equity stance, and the HECC Equity Lens to deepen understanding, build relationships, and avoid harm to currently and historically underserved communities.[6] Oregon will know we have achieved our equity goals when a learner's demographic characteristics or geographic location can no longer predict participation and success in CTE programming.

### Our Beliefs:

- We have an ethical and moral responsibility to ensure an education system that provides optimal learning environments that lead students to be prepared for their individual futures.
- Speaking a language other than English is an asset, and our education system must celebrate and enhance this ability alongside appropriate and culturally responsive support for emerging multilingual students.
- Students receiving special education or disability services are an integral part of our educational responsibility, and we must be inclusive, make appropriate accommodations, support skill development, and celebrate their strengths and workforce contributions.
- Students who have previously been described as "at risk," "underperforming," "underrepresented," or "minority" actually represent Oregon's best opportunity to improve overall educational outcomes. Many counties in rural and urban communities have populations of color that make up the majority. The ability to meet the needs of our increasingly diverse population is a critical strategy for us to reach our state education goals successfully.
- We respect the right of each Tribe to assert both Tribal and educational sovereignty, emphasizing our dedication to the unique cultural and educational rights of Native American students in Oregon. Collaborating with Tribal communities to inform our educational programs is fundamental to advancing a more inclusive educational environment for all Native American students in the state.
- Every learner must be supported in accessing information about a broad array of career opportunities and education and training programs, including apprenticeships.
- Communities, parents, teachers, and community-based organizations have unique and important solutions to improving outcomes for our students and educational systems. Our work will be successful only if we are able to truly partner with communities, engage with respect, authentically listen, and have the courage to share decision-making, control, and resources.
- The rich history and culture of learners are a source of pride and an asset to embrace and celebrate.
- We believe in the critical importance of culturally responsive teaching and workforce diversification. An equitable education system requires providing educators with the tools and support to meet the needs of each student and a dedicated effort to increase the culturally and linguistically diverse educators who reflect Oregon's rapidly changing student population. Our institutions of postsecondary education and training, and the P-20 system, will truly offer the best educational

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

experience when their faculty, staff, and students reflect this state, its growing diversity, and the ability for all of these populations to be successful in their educations and ultimately in their careers.



Understanding that there have been barriers that have limited opportunities for many groups of students to benefit from high-quality CTE, we will focus on better understanding and then removing these barriers for our students—including but not limited to students of color, students with disabilities, students navigating housing instability, American Indian/Alaska Native students, students navigating poverty, students who are currently or were incarcerated, students pursuing nontraditional careers by gender, youth in or formerly in the foster care system, and adults who desire to increase their basic skills attainment to enter or advance in careers.

Successful implementation of the CTE State Plan relies on the engagement and support of our CTE partners: students, families, Tribes, diverse communities, educators, schools, colleges, business and industry, workforce development, local governments, and other state agencies. We all play a role in supporting CTE and our learners seeking to build and expand their careers. Participants who helped craft the CTE State Plan felt strongly that they wanted to see their role in the work and the actions they could take to achieve our state vision. Appendix C: Implementing the Plan – Proposed Partner Actions provides many of the recommended ways partners can support the operationalization of this plan. State agencies will monitor the implementation of the CTE State Plan and engage with the CTE Advisory Council, Agency leadership, CTE leaders, and our constituents to ensure that our state is making progress toward our goals.

## Youth Corrections

Oregon has a team that helps youth correctional (YCEP) and juvenile detention (JDEP) facilities provide career exploration, programming, certifications, and other opportunities for their students that can lead to community college enrollment and/or a career in CTE. The team helps to distribute funding for various projects across the state.

*"We have added to our ability to help our youth develop skills and character that give them hope for their future. When we do our work through hands-on, project-based learning experiences, our youth discover 'they can,' and that gives them courage, hope, and confidence for tomorrow."*

**~ David Miller | Trask River School, Tillamook YCEP**

*"Students share that they appreciate the opportunity to learn hands-on. One student expressed that they felt valued because they are trusted with equipment. JDEP staff have expressed tremendous appreciation for the opportunity to learn these skills that they can then share with students. The staff at Jackson County JDEP are especially grateful and value this experience as one of the most impactful they have been able to participate in."*

**~ Dr. Larina Warnock | Medford School District, Jackson County JDEP**

## Matching Strategies to the Vision

CTE Programs of Study are the core of CTE in Oregon, and the outcomes and strategies in this plan will contribute to improvements in CTE Programs of Study in terms of quality, equity, and access. Building robust pathways with multiple on-ramps for instruction, starting with middle grades programs of exploration and moving through adulthood, will be key in communicating relevancy and opportunity. Only state-approved CTE Programs of Study are eligible for CTE funding in Oregon. This reflects the state's commitment to ensuring high-quality CTE programs that demonstrate partnership and alignment between secondary, postsecondary, and employers. Oregon has expanded the reach of Perkins dollars and leveraged other state and federal funds to expand career connected learning across Oregon. Increased opportunities to explore future careers are important to build equitable pathways into high-wage careers. Oregon's Programs of Study are based on the 16 National Career Clusters and are organized around the following six career areas: Agriculture, Food, and Natural Resource Systems; Arts, Information, and Communications; Business and Management; Health Sciences; Human Resources; and Industrial and Engineering Systems. After program completion at the secondary level, a student may continue in a program to earn a credential, a certificate, or an associate or baccalaureate degree. Adult students may also transition from Adult Basic Skills to credit-bearing CTE through models such as Integrated Education and Training and Career Pathways. CTE programs at postsecondary institutions are the link to the needs of and opportunities within business and industry and provide flexible opportunities for CTE learners of all ages.

***Oregon CTE Programs of Study provide instruction in technical, academic, and employability skills that can lead to high-wage, high-skill, and in-demand occupations. A CTE Program of Study in Oregon describes a prescribed sequence of non-duplicative courses developed in partnership by a secondary school district and a postsecondary institution that prepares students to transition across education levels and seamlessly enter the workforce. Coursework integrates rigorous academic knowledge with industry-validated technical and employability skills, progressing in specificity and aligned with industry needs. Many CTE Programs of Study provide opportunities for high school students to earn college credit, though Oregon continues to work on the transferability of credits.***

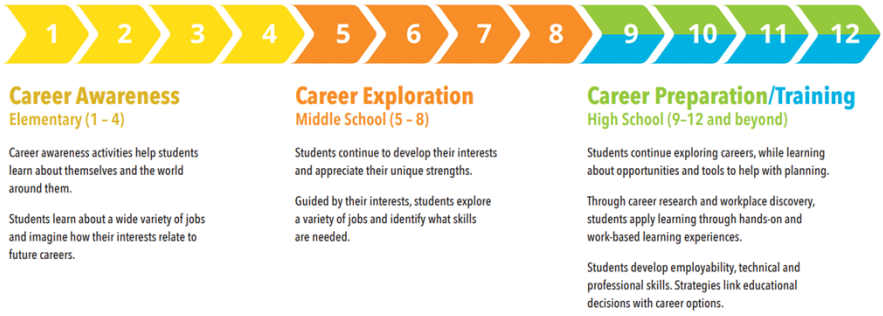
The outcomes and strategies in this plan are organized under the CTE Without Limits[7] framework published by Advance CTE. This framework provides a bold vision for a career preparation ecosystem that is cohesive, flexible, and responsive, supporting a system that closes equity gaps in education and workforce readiness by leveraging CTE as a catalyst that ensures each learner can thrive in their chosen career. The work to achieve Oregon's vision for CTE is aimed at achieving three overarching outcomes. The plan below describes each outcome, shares a vision of what it will look like when Oregon achieves these outcomes and provides strategies to focus priorities in the coming 4-years. Appendix D: Oregon's CTE Without Limits Action Plan details a more comprehensive plan of the specific strategies and activities.

## Outcome 1: Career connected learning that is systemically integrated with education and workforce development.

Oregon has been promoting and supporting the development of Career Connected Learning since 2020. It has become a rallying call for partners across the state, particularly STEM Hubs, community-based organizations, and business and industry. Oregon has built career guidance supports, including a CCL Resource Hub, access to career guidance software, the Oregon Career Information System and YouScience, and media such as the Career Journey videos. The Oregon Department of Education defines Career Connected Learning (CCL) as a framework of career awareness, exploration, preparation, and training (Figure 2). Career learning develops over the course of one's lifetime. To support this process, CCL ensures purposeful instruction and engages diverse communities in building collaborative, community-driven learning. CCL connects the interests, aptitudes, education, and goals of every Oregon youth to their future.

[7] Advance CTE - CTE Without Limits https://careertech.org/our-vision/cte-without-limits/

Figure 2: Oregon Career Connected Learning Framework




**What this looks like:**

- Each and every learner has the opportunity to engage in cohesive, flexible, and responsive career awareness, exploration, preparation, and training
- Each and every learner has opportunities to explore future careers and connect learning in the classroom to their communities and/or future careers
- Each and every learner is empowered with information to skillfully navigate their own career journey

**Strategies to Achieve Outcome 1:**

Strategy 1 - Align education and workforce systems to ensure equitable access to career connected learning and elevate effective resources and assets to foster seamless transitions from and between education, training programs, and careers.

Strategy 2 - Prioritize middle-grades career awareness and exploration to intentionally diversify and expand interest and opportunity for participation in CTE Programs of Study leading to high-wage, in-demand careers.

Strategy 3 - Empower all Oregon educators and community partners to support students' awareness and navigation of pathways to careers through learning and experiences.

*"Career and Technical Education is the bridge that connects students to the careers of the future, equipping Oregonians with the skills, knowledge, and real-world experience essential for success in high-skill, high-wage, high-demand professions. In collaboration with industry, community colleges play a pivotal role in shaping a robust workforce that not only fortifies our economy but also offers a pathway to economic mobility for all Oregonians, with a particular focus on historically underserved communities."*

**~ Dr. Adrien Bennings | President, Portland Community College**

Career Awareness and Exploration can happen at any age and any stage for an individual. The pace and flow of career preparation and training may vary depending on student readiness, district programming, and community partnerships. The Career Connected Learning (CCL) domains in Figure 2 are organized by recommended grade levels to provide districts an example of a K-12 Scope and Sequence for career development. Work-based learning (WBL) is a focus area for CCL in Oregon, and since the 2020 plan, Oregon has grown WBL in CTE Programs of Study, with now over 50% of concentrators having high-value connections to business and industry partners.

## Outcome 2: Increased equitable participation in high-quality CTE and career connected learning.

Creating inclusive, high-quality CTE and CCL that provides equitable access to all Oregonians is fundamental to the state's vision for CTE. This outcome most directly ties to the work of Oregon's CTE leaders and educators and our partners in the Career Connected Learning community. Oregon has invested state funds to incentivize persistence in CTE Programs of Study and provided schools with additional resources to develop strong high school programs, including CTE.

**What this looks like:**

- Each and every learner feels welcome in, is supported by, and has access to career exploration and awareness and the means to succeed in career preparation and training with a particular focus on all dimensions of diversity, equity, and access, including educational, racial, Tribal sovereignty, socioeconomic, gender, and geographic
- Removal of barriers (cultural, financial, physical, structural) that prevent learner participation
- All CTE Educators are given the tools, training, and supports necessary to provide equitable, inclusive, and high-quality CTE programs
- Each learner's strengths and skills are counted, valued, and portable
- Student Leadership (CTSO) opportunities and engagement that reflect real-life business and industry experiences and expectations
- Each learner can access CTE Without Borders, expand learners' access to high-quality CTE and work-based learning opportunities within and across state lines

*"CTE offerings at RCC play a critical role in our local economy. Many programs provide tracks for stacked credentialing so students can fill high-demand jobs sooner and continue to earn while they learn as advanced credentials are obtained."*

**~ Randy Weber, Ed.D. | President, Rogue Community College**

**Strategies to Achieve Outcome 2:**

Strategy 1 - Center equity and learner experience in decision-making, resource distribution, policies, and practices.

Strategy 2 - Strengthen the quality and consistency of CTE Programs of Study by developing resources and training educators, administrators, and partners to improve instruction.

Strategy 3 - Create clear CTE educator retention and recruitment systems, resources, and supportive spaces.

Strategy 4 - Develop innovative policies and models to ensure CTE programs have the flexibility needed to provide access for all students while meeting the demands of today and tomorrow.

The State Plan includes action steps to provide many resources and strategies that will help build and maintain high-quality CTE Programs of Study.

**Alignment to labor needs and state priorities:**

Approved CTE Programs of Study must lead to occupations in high-skill, high-wage, in-demand career areas. Additionally, Oregon requires community colleges to develop and submit a Labor Market Analysis when submitting new programs for state approval. In order to ensure districts and community colleges have the most up-to-date information when designing new CTE Programs or updating their existing CTE Programs of Study, CTE Regional Coordinators participate in a Labor Market Information (LMI) training with the Oregon Employment Department, meet with their Local Workforce Analysts, and collaborate with postsecondary and workforce partners to prepare LMI materials for districts and local community colleges. These materials are then used by eligible recipients as they engage their communities through the needs assessment process and through engagement with CTE Advisory Committees, regional sector partnerships, and statewide Industry Consortia.

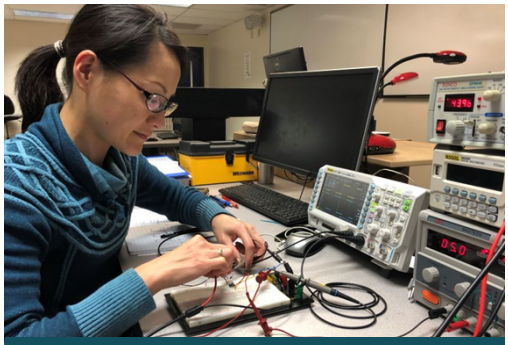


Photo Courtesy of Clackamas Community College

Through coordinated community engagement, aligned CTE Programs of Study, a shared understanding of regional needs and priorities, and pertinent labor market information, districts, and community colleges are able to build robust pathways for students' continued success after graduation. It is recommended that districts and community colleges coordinate their partner engagement around CTE Programs of Study and regional labor market needs and priorities to further the required alignment between secondary and postsecondary CTE Programs of Study and strengthen the connection to high-skill, high-wage, in-demand careers. This intentional collaboration helps ensure the entire region and all partners are working towards providing a well-rounded education, building rigorous, relevant, and authentic learning experiences for students along with connections, networks, and pathways for each individual's successful transition into a career of their choice.

**Quality Program Support:**

The size, scope, and quality definition creates the foundation for a CTE Program of Study. This definition will be used jointly by secondary and postsecondary institutions to demonstrate that a newly proposed CTE Program of Study has the fundamental requirements. This minimum definition will be maintained at all times and reviewed every three years during the CTE Program of Study renewal process.

The CTE Program of Study Quality Rubric is a tool designed to help secondary and postsecondary institutions explore a CTE Program of Study more deeply and create a plan for continuous improvement. Secondary and postsecondary institutions and CTE regional leaders will be expected to develop and

document continuous improvement goals related to each CTE Program of Study and submit those as part of the CTE Program of Study renewal. CTE Programs of Study will be evaluated during the initial and renewal phases to ensure they meet state requirements and are supporting continuous improvement in academic, technical, and employability skill attainment  Approved CTE Programs of Study must have a purposeful alignment between the high school courses and a community college certificate or degree that leads to a high-wage, high-skill, and in-demand career (as defined in Appendix J: CTE State Plan Glossary) and progress in specificity of content to avoid duplication (See Appendix E: CTE Program Approval Process). The alignment can result in an opportunity for high school students to earn college credit and increase Oregon's achievement of goals for postsecondary credential attainment.

The size, scope, and quality definition and the CTE Program of Study Quality Rubric guide continuous improvement. The local and regional needs assessment provides the focus and evidence.

**Consistency and Support Statewide:**



Photo Courtesy of Central Oregon

The development of the statewide CTE Program of Study Frameworks has been identified by partners as an important new direction for Oregon. Oregon will complete the creation of Statewide CTE Programs of Study in each career area in 2024.  The process was improved each year, and there is still a lot of work to be done to strengthen the Statewide Programs of Study and use the statewide frameworks to build better connections between industry, college, and K-12.  The state will continue to provide support for the Statewide CTE Programs of Study.

Our CTE State Plan will allow students to learn from a range of knowledgeable experts who contextualize learning and create robust integration of academic and technical content. At the heart of every CTE program are the educators. Without quality educators who build relationships with our learners and support the journey from education to career, all the systems in the world will not achieve improved outcomes across our population of diverse students.

The recruitment and support of our educators, mentors, counselors, and business and industry partners is essential to achieving Oregon's vision for CTE. Therefore, we are committed to building a diverse educator workforce in both secondary and postsecondary education, but we recognize that educator shortages and mismatch in systems of compensation for educators from traditional pathways and those who enter the profession from business and industry continue to be barriers.

**Flexibility to ensure CTE without limits:**

Our CTE State Plan will focus on flexible learning systems that allow Oregonians to gain necessary skills where and how they best meet their needs. Flexible learning helps achieve equity goals by acknowledging learners' diverse needs and competing priorities while providing the tools and techniques that are critical to the success of a range of learners. CTE Program of Study choices vary by school and college location; the differences are often substantial and inequitable. Rural communities often have fewer CTE opportunities due to resource constraints, greater distances to population centers, and the nature and assortment of industries found in these areas. Supporting flexible learning is a way to explore creative solutions to bolster program offerings for rural communities.

*"At Clackamas Community College, we believe that CTE not only provides valuable skills and knowledge but also serves as a driving force for economic development. By equipping students with practical, hands-on training, we are not just educating individuals, we are preparing a skilled workforce that contributes to the growth and prosperity of our community."*

**~ David Plotkin | Vice President of Instruction and Student Services**
**Clackamas Community College**

## Outcome 3: Expanded communication, transparency, and diversity of voices and contributors connected to education and workforce development partnerships.

A critical component is to ensure students, parents, and communities are informed about career pathway options and resources. ODE maintains a website of approved Programs of Study in each high school and college. HECC maintains an expanded list of all approved postsecondary CTE programs at each college. Additionally, this plan outlines resource development for Career Exploration and Work-Based Learning Opportunities.

**What this looks like:**

- Meaningful partnerships with students, families, educators, Tribes, community-based organizations, workforce development, state agencies, and industry partners deeply invested and involved in the design, delivery, and success of the CTE system
- Continuous improvement, collaboration, and alignment by leaders at all levels within our education and workforce development systems
- Actionable, transparent, and trustworthy data that addresses the demographic questions, the inclusion and equity aspects, and the longitudinal outcomes of our CTE Programs of Study

**Strategies to Achieve Outcome 3:**

Strategy 1- Pursue meaningful collaboration with communities, Tribes, families, and students to provide comprehensive outreach and communication for those who are impacted by decisions regarding career connected learning and CTE systems.

Strategy 2 - Create structures to achieve transparent sharing of data to support well-rounded, equitable approaches to preparing learners for life after secondary education.

Strategy 3 - Enhance the use and accuracy of data, reporting, and information systems to drive data-informed decision-making, monitoring state-identified performance targets, local implementation of CTE Programs of Study, and use of funds.

Access to State Leadership funds via ESSERIII has allowed ODE to work collaboratively with a wide array of educational leaders to develop and populate a Career Connected Learning Resource Hub. The Resource Hub is available statewide and houses tools and resources to support practitioners, students, and families in the four domains of Career Connected Learning. A team of Career Connected Learning System Navigators, located at all 17 Oregon Community Colleges, along with a statewide Career

Connected Learning Coordinator and a CTE Tribal Liaison, collaboratively support the dissemination of the CCL Resource Hub throughout the state. Their work focuses on supporting and aligning systems that provide career awareness, exploration, preparation, and training for learners down to middle grades and across the transitions into high school, career, and postsecondary opportunities. Additionally, the Tribal Liaison plays a pivotal role in facilitating collaboration among Tribes, the Oregon Department of Education, the Higher Education Coordinating Commission, local education agencies, community colleges, CCL Network, STEM Hubs, and local workforce development boards. This collaboration aims to expand opportunities for Tribal youth to access Career Connected Learning and CTE opportunities within their communities.

Our CTE State Plan will support seamless transitions, including those between technical and academic learning in education and the workplace and between secondary or Adult Basic Skills and postsecondary education.[8] Additionally, our statewide partner engagements have clearly identified a need for additional CTE courses and teachers, career information and exposure to CTE, particularly for students in the middle grades and underserved populations, and targeted resources for rural communities.

### Accelerated Learning

The Oregon Department of Education and the Higher Education Coordinating Commission have created a joint state team that manages approval, support, and guidance for accelerated learning programs. The state team tracks accelerated learning participation, including CTE, and coordinates opportunities for collaboration between partners, including research and evaluation, and tracking student outcomes such as education and training beyond high school, including college enrollment, persistence, and transfer of credit. Oregon's CTE State Plan will create Statewide CTE Programs of Study—resources associated with these programs will communicate opportunities for earning college credit while in high school and how those credits fit into career pathways. The focus of accelerated learning in Oregon centers on educational equity and increasing equitable access, participation, and advancement for historically underrepresented students in postsecondary education. Recent trends indicate a significant drop in the percentage of college credits earned by high school students that is CTE credit. In 2017-18, 25% of these credits were considered CTE, which dropped to 12% during the pandemic-impacted 2020-21 school year and rebounded slightly to 17% in 2021-22. The joint state team has launched a research effort to identify the root causes of this decrease in CTE college credit earning that engages national, state, and regional partners, including K-12 and community college educators.

## Accountability

Oregon will continue to focus on accountability through monitoring state-identified performance targets and local implementation of CTE Programs of Study and use of funds. Oregon convened a partner group, including K-12 and postsecondary partners, to analyze the past two years of available statewide CTE

[8] Multiple partners, including business partners and educators, cited a need to reexamine Oregon's graduation requirements to ensure that all students are gaining the skills necessary to be successful in the rapidly changing world. A reexamination of Essential Skills, career-related learning experiences, and requirements were all cited as possibly needing an update.

data and set our state-determined performance levels. See Appendix I: Performance Targets for a full description of our state-determined performance targets and the process for arriving at these levels.

Oregon continues its commitment to engage partners throughout the development and implementation of Oregon's CTE State Plan and to inform the in-depth use of data and feedback. Part of that process includes the implementation of a comprehensive local needs assessment by each Perkins grant recipient to ensure that spending matches needs (see Appendix B: CTE Needs Assessment). In Oregon, Perkins and CTE have been included in an Integrated Application that integrates several education initiatives that all focus on well-rounded education, advancing equity, engaging community, and strengthening systems and capacity. All public K-12 districts go through the needs assessment and community engagement process outlined in the integrated guidance every two years. Post-secondary institutions and consortia complete a parallel needs assessment process. Grantees are not required to submit their needs assessment but must share a high-level summary of the results as part of their Perkins Application and retain the complete needs assessment results for monitoring. The results of these needs assessments are used by local partners to determine priorities for resource allocation, collaboration, and engagement.



*Photo Courtesy of Central Oregon Community College Apprenticeship program*

## Fiscal Guidance and Support

We will continue to support local education entities (school districts, regional recipients, and colleges) receiving federal and state sources of CTE funding to ensure proper stewardship of those funds. Federal CTE funds are allocated according to federal guidelines.[9]

Our federal funds are split evenly between secondary and postsecondary recipients (see Appendix H: Perkins Budget). This is based on our long history of equitable sharing of funds, and was reaffirmed during partner discussions in 2019.

Beginning with the 2023-2024 needs assessment, application, and budget submission, Perkins for K-12 recipients are included in an integrated application process called Aligning for Student Success, which integrates application and reporting requirements for multiple ODE grant programs in order to promote

[9] Secondary eligible recipients that do not qualify for the $15,000 minimum or postsecondary that does not qualify for the $50,000 minimum; or eligible recipients that cannot sustain a program of sufficient size, scope and quality will be encouraged to form or join a consortium with another eligible recipient. The funds generated by all eligible recipients within will be awarded to the fiscal agent of the consortium and shall be used only for purposes and programs that are mutually beneficial to all members of the consortium and can be used only for Programs authorized under Perkins V.

cohesion between programs, reduce duplication of effort, and leverage expertise and resources across programs to produce better results and more equitable outcomes. The integrated application process includes all Perkins requirements for engagement needs assessment, application, and budget. Consortium and postsecondary direct application processes are aligned with the integrated application process.

Perkins Basic Grant recipients will submit an application to the state to receive their federal Perkins funds. The proposal will include a four-year strategic plan for CTE based on their local CTE needs assessment, which will be informed by their partner engagement process. The proposal will tie the local needs to academic and technical skill attainment activities that will lead to a recognized postsecondary credential. Prior to approval, ODE and HECC will review and approve the proposals to ensure that they align with the identified needs. There will be a bi-annual submission of a budget to ODE that demonstrates a tight connection to improving equitable access to and benefit from CTE and meeting needs identified in the local CTE needs assessment. Recipients will provide quarterly reports on grant expenditures, changes to the budget, and progress on activities. We are committed to ensuring that CTE works for Oregon and that the use of public funds supports the vision and goals of our state.[10] Oregon will monitor local recipients based on the process outlined in our CTE Policy Guidebook (Appendix K).

**Leadership Set Asides**

The state is also committed to focusing resources on areas of identified needs. Each year, Oregon reserves 10% of the federal funding for CTE (Perkins funds) for use by state leadership. Oregon meets the required use of these funds through programs including:

- Supporting the recruitment of special populations into CTE programs by creating resources and best practices.
- Supporting CTE programs and opportunities for students in state institutions by focusing 2% of its 10% of leadership funds on youth and adult correctional facilities and the Oregon School for the Deaf.
- Ensuring equitable access to high-quality CTE programming by participating in a professional learning community with the National Association for Partners in Education (NAPE) and other states to further understanding and inclusion of student input to CTE programs.
- Ensuring better communication tools, including creating greater awareness of the CTE teacher licensure process and program development, focused communication on the value of CTE for focal populations, support and guidance for education administrators on how to build and support strong CCL and CTE programs, and guidance for business and industry on how to become involved in CTE.
- Creating and implementing an onboarding program to support new CTE educators during their first three years that includes a robust orientation; intentional mentorship; resource support; professional development in content, pedagogy, and working with partners in business, industry, and education; professional learning communities; administrator engagement; and opportunities to network with other CTE teachers across the state.

[10] Oregon requires each Basic grant recipient to set aside a minimum of 15% for professional development needs identified. Additionally, there is a maximum cap of 30% of the Basic grant allocation that can be used for staffing costs associated with program leadership.

- Supporting educators through professional learning communities and training opportunities tied to industry changes, culturally sustaining pedagogy, and academic, employability, and technical skills integration in their CTE instruction.



*Photo Courtesy of Southwestern Oregon*

The remaining leadership funds will be focused on achieving our vision for CTE by addressing the following needs identified through the statewide needs assessment process, including:

- Supporting statewide CTE Programs of Study Frameworks and the partnership between secondary and postsecondary institutions.
- Expanding career awareness and exploration opportunities into the middle grades.
- Supporting the domains of career connected learning by providing scope and sequence with multiple entry points for learners and training for practitioners on implementing quality career advising and development.
- Growing capacity to offer equitable quality work-based learning opportunities in secondary CTE programs.
- Piloting ways to support flexible CTE Programs to encourage more opportunities for students, particularly rural students.

## Perkins Reserve Fund Use

Oregon has a rich history and strong belief in the value of regional coordination of CTE programs and supporting partnerships between colleges, school districts, education service districts, workforce development, and regional employers. Oregon already has a regional CTE structure in place, which is supported by 14 CTE Regional Coordinators.

Oregon sets aside 15% of its Perkins Reserve Fund to build regional support for CTE Program of Study implementation and partnerships. The Perkins Reserve's priority focus is the development and implementation of Work-Based Learning (WBL), Career Connected Learning (CCL), and career technical education (CTE) within the context of CTE Programs of Study (POS), especially in small/rural/remote areas of Oregon.

In response to a Regional Education Laboratory Northwest study[11] showing a decline in programs and access in small/rural schools, a Small/Rural Regional Funding Supplement was provided to qualifying regions that includes a baseline leadership supplement, travel to support on-site support and an equalization supplement to equalize the cost of supports in a rural setting. The supplement was first provided during the 2021-2022 school year and continued to the 2023-2024 school year. A workgroup has been formed to explore longer-term strategies.

Regional Coordinators submit a WBL and CTE Project Plan that describes how the region will develop innovative approaches to creating multiple on-ramps and off-ramps to CTE Programs. Regional Reserve Grant Applications are reviewed to ensure applicants promote academic achievement and technical skill

[11] Arneson, A., Hodara, M., & Klein, S. (2020). Career and technical education in Oregon: Exploring who participates in high school and the outcomes they achieve. Portland, OR: Education Northwest, Regional Educational Laboratory Northwest.

attainment leading to a postsecondary credential and that the local needs assessment takes into consideration local and regional labor market and education needs. Particular attention will be paid to rural CTE providers by focusing on developing, implementing, and adopting quality CTE POS and supporting regional coordination of promising CTE practices. Funds will support the implementation and expansion of career exploration and guidance and the implementation of equitable work-based learning, particularly in rural communities.

Funding allocations are calculated using the funding formulas found in Section 131 and Section 132 of the Perkins Act. Approved applications must demonstrate—among other things—how recipients will provide students with the skills needed to succeed in the workplace.

For compliance purposes, the following statements are offered:

- The data used to calculate allocations takes into account all current data reflecting school district boundaries.
- The agency does not seek a waiver to the secondary allocation formula.
- The agency does not seek a waiver to the postsecondary allocation formula.
- Oregon intends to maintain the current level of effort.

## Appendices

**APPENDIX A: COMMUNITY ENGAGEMENT SUMMARY (Under construction)**

**APPENDIX B: CTE NEEDS ASSESSMENT TEMPLATES (Under construction)**

**APPENDIX C: IMPLEMENTING THE PLAN – PROPOSED PARTNER ACTIONS (Under construction)**

**APPENDIX D: CTE WITHOUT LIMITS ACTION PLAN (Under construction)**

**APPENDIX E: CTE PROGRAM APPROVAL PROCESS (Under construction)**

**APPENDIX F: CTE PROGRAM SIZE, SCOPE, AND QUALITY (Under construction)**

**APPENDIX G: HIGH-QUALITY PROGRAM OF STUDY RUBRIC (Under construction)**

**APPENDIX H: PERKINS BUDGET (Under construction)**

**APPENDIX I: PERFORMANCE TARGETS (Under construction)**

**APPENDIX J: CTE STATE PLAN GLOSSARY (Under construction)**

**APPENDIX K: CTE POLICY GUIDEBOOK**

Future Forward Education



# Oregon's CTE Strategic Plan

## Adoption



*Photo Credit: Mt. Hood Community College*

# Outcomes

Career connected learning that is systematically integrated with education and workforce development

Increased equitable participation in high-quality CTE and career connected learning

Expanded communication, transparency, and diversity of voices and contributors connected to education and workforce development partnerships

# Career Connected Learning Resources



## Aileen Calletano

Synthetic Chemist

**Eugene**

Aileen Calletano is a synthetic chemist at Cascade Chemistry, a chemical manufacturing company in Eugene, Oregon. Like a cook perfecting a dish, Calletano makes compounds for clients and refines their recipes.

VIEW STORY

## Brandon Larrabee

G.I.S. Specialist

**Siletz**

Brandon Larrabee is a geographic information systems specialist for the Bureau of Indian Affairs. Larrabee works to create digital representations of geographic areas to help with land restoration projects and environmental analysis.

VIEW STORY



## Ayanna Richiliano

Graphic Designer

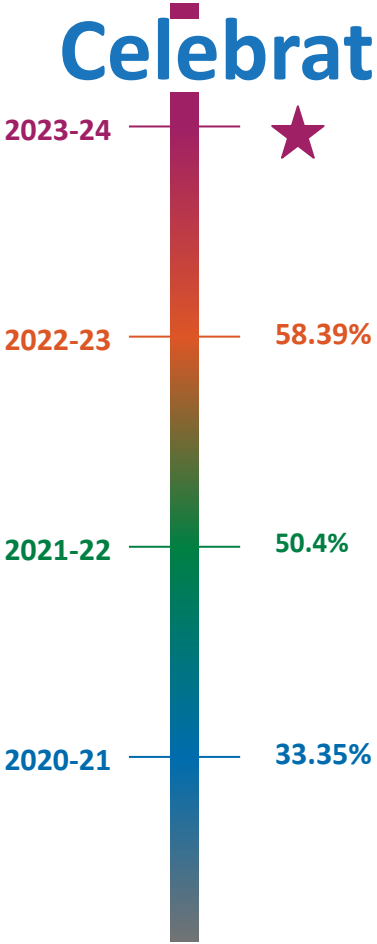
**Hood River**

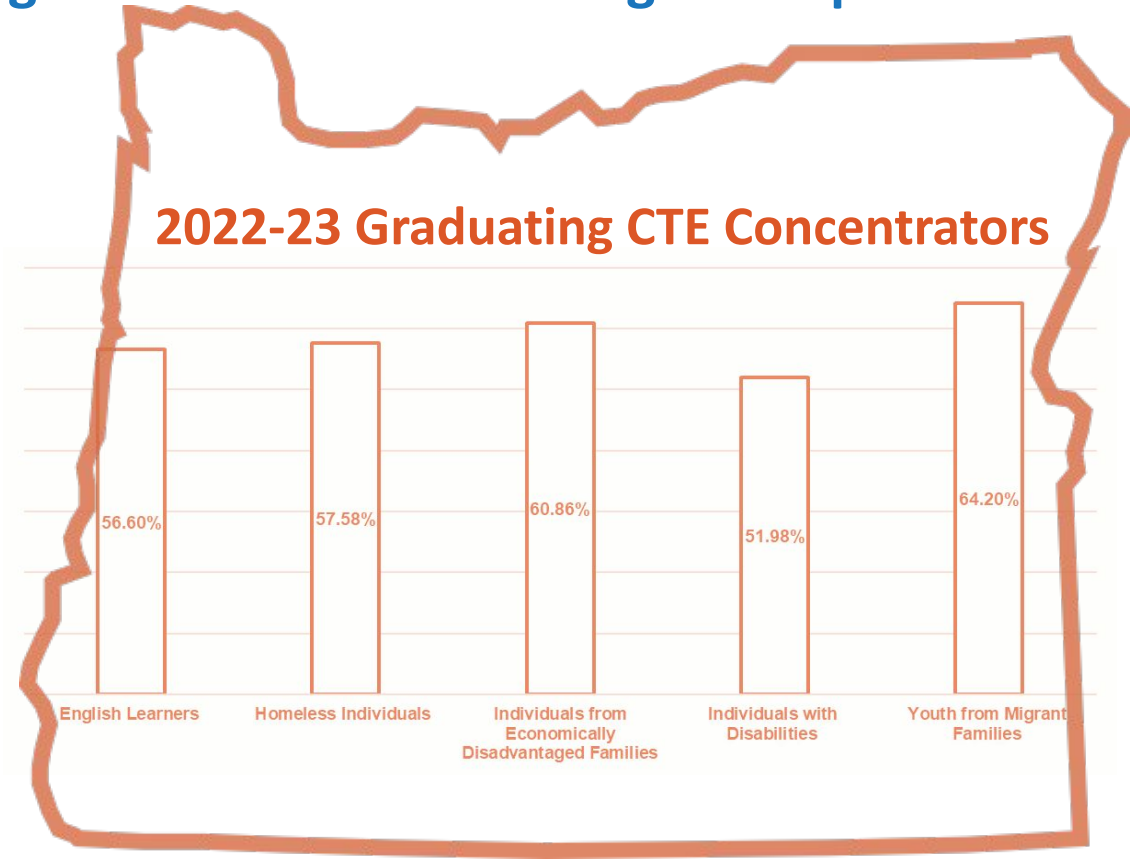
Ayanna Richiliano is a freelance graphic designer in Hood River, working on creative projects for small businesses and the city of Mosier. From layout and illustration to branding and communication, her job doesn't just check one box.

VIEW STORY

# Celebrating Statewide Success

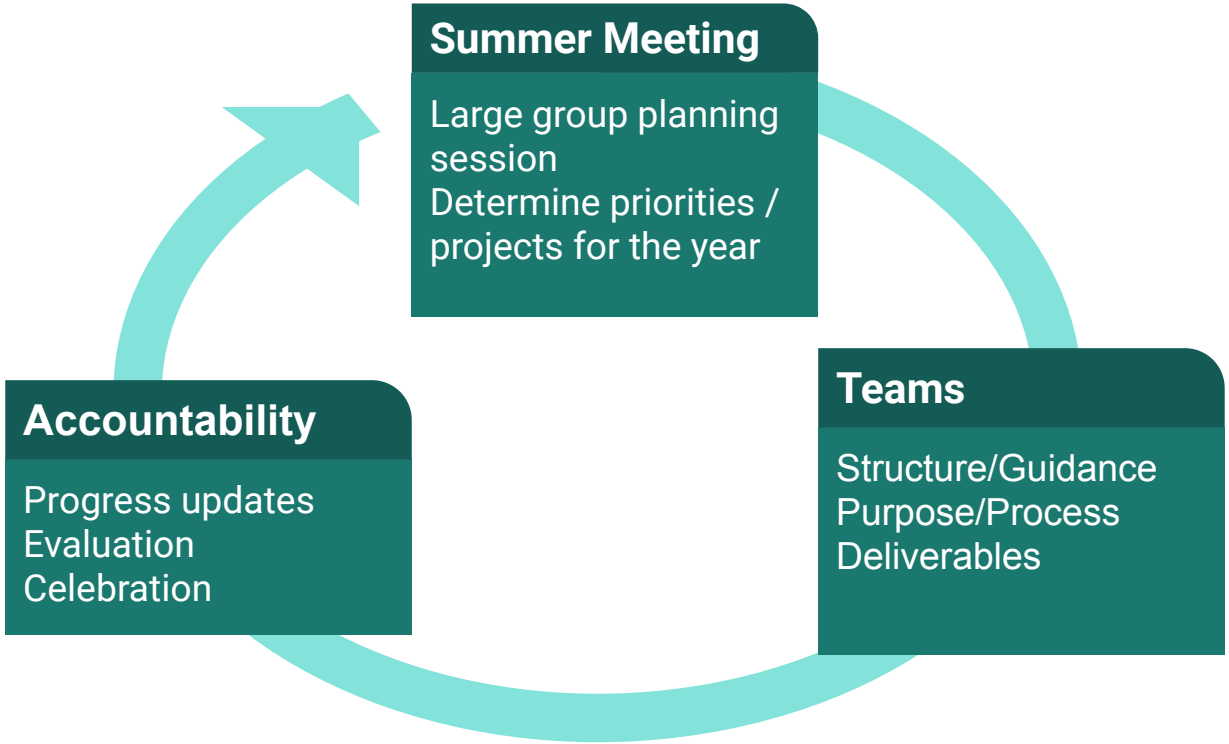
## Oregon Work-Based Learning Participation




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# Implementation Will Take All of Us



# Questions: Please Contact Us

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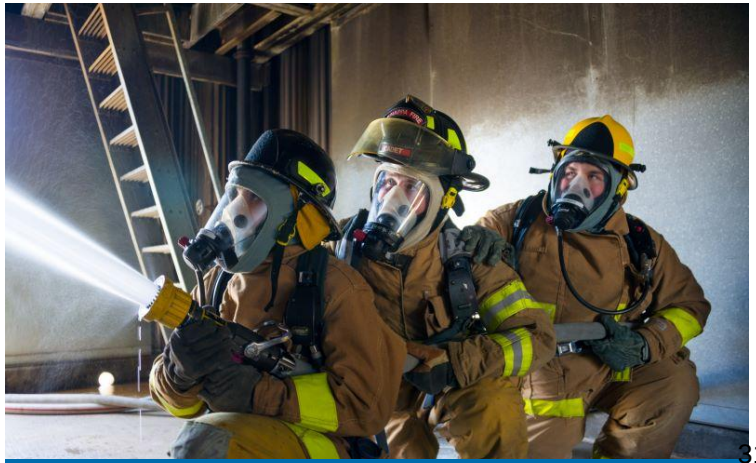


*Photo Credit: Clatsop Community College*



OREGON DEPARTMENT OF EDUCATION
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CTE™

HIGHER EDUCATION COORDINATING COMMISSION

# Instructional Materials Adoption Schedule

**Adopted by the State Board of Education – June 2018 (rev. June 2020)**

The State Board of Education is responsible for maintaining a review cycle at the state level. At the June 2018 meeting, the State Board approved the following schedule for review and adoption of instructional materials.

| **Revised Oregon State Review Cycle** | **For use in classrooms by fall:** |
|---|---|
| 2015: Mathematics | 2016 |
| 2016: Science | 2017 |
| 2017: Health & Physical Education | 2018 |
| 2018: Social Sciences | 2019 |
| 2019: No Instructional Materials Review | |
| 2020: World Languages | 2021 |
| 2021: ELA and ELL/ELP | 2022 |
| 2022: Mathematics | 2023 |
| 2023: Science | 2024 |
| 2024: Health | 2025 |
| 2025: Social Sciences | 2026 |
| 2026: World Languages, The Arts, Physical Education | 2027 |

Please contact Aujalee Moore (aujalee.moore@ode.state.or.us) at the Oregon Department of Education if you have any questions about the State Board's actions or the Instructional Materials Adoption Schedule.

# Oregon State Board of Education
# MEETING DATE
AGENDA ITEM:

| | |
|---|---|
| **SUBJECT:** Revision to ODE's Instructional Materials Cycle<br>**STAFF NAME & OFFICE**: Jenna Montgomery; Office of Teaching, Learning, and Assessment<br><br>OAR 581-011-0071 authorizes the State Board of Education to adopt instructional materials on the subject matter cycle established by the Board. In response to the Early Literacy Grant Program, ODE requests adding English Language Arts to the instructional materials cycle for 2024. This will allow ODE to potentially increase the variety of high quality instructional materials available for districts to adopt. | **☐First Reading**<br>**☐ Presentation**<br>**☐No Presentation**<br>**X Action**<br>**☐Temp Rule**<br>**X Presentation**<br>**☐No Presentation** |

**BACKGROUND**

OAR 581-011-0071 *Instructional Materials Adopted by the State Board of Education* delegates authority over the subject matter cycle to the State Board of Education, and the Board may revise the Subject Matter Cycle to meet the needs of Oregon districts and students. This happened most recently in 2022, when Physical Education was postponed to align with the finalization of new national standards, and in 2020, when Language Arts (LA) was postponed to 2021 due to the COVID-19 pandemic.

Instructional materials are regularly adopted by the State Board of Education on a 7-year subject matter cycle prior to October 31 each year (OAR 581-011-0070). This typically results in a 7-year contract with publishers for the content area proposed for adoption (ORS 337.050, OAR 581-011-0070, and OAR 581-011-0071). Once the State Board of Education has adopted the list of materials approved for adoption, school districts may select and adopt from the list (ORS 337.050 and OAR 581-022-2355), independently adopt instructional materials using the state criteria (OAR 581-022-2350), or postpone adoption for up to two years (OAR 581-022-2360). In February 2020, the Board adopted instructional materials criteria for English Language Arts. The current contract period for the materials adopted in October 2021 runs from February 1, 2022 to February 1, 2028.

In 2023, through the leadership of Governor Kotek, the Oregon Legislature established early literacy as a top priority with the passage of HB 3198 and the Early Literacy Success School District Grants. This legislation, the recent adoption of permanent rules for the grant, and ODE's release of Oregon's Early Literacy Framework present an opportunity for the State to support the use of high-quality, research-aligned, and culturally responsive instructional materials for ELA statewide. Per HB 3198, districts may use grant dollars to purchase and implement research-aligned, culturally relevant ELA curriculum. Starting in January 2025, funds from the Early Literacy Success School District Grant used for the adoption and implementation of K-3 core instructional materials may only be used to purchase materials from the State Board of Education adopted list

for English Language Arts. Currently, the next adoption for ELA materials is scheduled to take place in 2027.

In response to the work around early literacy, ODE proposes adding K-5 English Language Arts to the 2024 adoption schedule to expand the State Board approved list. The existing criteria that was adopted in 2020 and utilized in 2021 would be used to evaluate materials. This shift would allow publishers that are not currently on the list to submit materials for review and possible adoption, potentially giving districts who have not adopted materials additional options that meet the Early Literacy School District Grant requirements.

The intent of ODE is to expand the current selection of instructional materials for K-5 ELA– not to remove publishers from the approved list. No instructional materials currently on the 2021 SBE-adopted list will be removed or reevaluated until the next adoption cycle begins in 2027, and publishers with materials on the current list would not need to re-apply. Districts using materials on the current list need not re-adopt or be concerned that their materials in use will be removed from the SBE-adopted list. Any materials added to the SBE list during this off-cycle adoption will have a contract period ending in 2028.

This proposed change in the adoption schedule was determined necessary by both ODE's Literacy Team and the Standards and Instructional Supports Team, who will be collaborating on this adoption. By adding ELA to the adoption schedule for 2024, ODE would help ensure that districts and charter schools eligible for Early Literacy Success funds have a wider variety of research-aligned, high quality instructional materials to choose from on the state adopted list.

While typically ODE brings a change to the instructional materials adoption cycle to the board twice to allow additional feedback from the public, we are not doing so this time. Starting in January 2025, if Districts plan to use funds from the Early Literacy Success School District Grants for the adoption and implementation of K-3 core instructional materials, they must choose materials from the State Board of Education-adopted list for ELA. In order to expand that list, the process must be expedited. As defined in OAR 581-011-0070, the State Board of Education has until October 31st each year to adopt instructional materials. A second read pushes the timeline back such that we would not be able to make the October deadline.

In order to meet this deadline, the Standards & Instructional Support Team and Literacy Team need to begin outreach to both districts and publishers as soon as possible. By expediting the timeline for this action, it will ensure that publishers have enough time to submit materials and essential documents, and that ODE has enough time to recruit and appoint evaluation committees and evaluate materials accordingly.

**SUMMARY OF PREVIOUS BOARD ACTION**

The Board approved requests to change the adoption schedule in 2020 (ELA) and 2022 (PE).

# Oregon State Board of Education
# MEETING DATE
AGENDA ITEM:

**HAS THE RULE CHANGED SINCE LAST BOARD MEETING?**

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

**POLICY ISSUE OR CONCERNS**

**Stakeholders/Partners:**

- This additional adoption impacts all districts and charter schools eligible for the March 2025 Early Literacy Success School District Grant application (about 250 total districts and charter schools statewide) and provides eligible applicants the opportunity to review the expanded list as they consider any updates to their current early literacy curriculum. The list will be especially useful for districts that have not yet adopted materials on the State Board list.

**Positive Effects:**

- This is an opportunity for coherence: a new grant initiative, new requirements for that grant, and ODE's processes for adopting instructional materials can together support and promote the use of high-quality, research-aligned, and culturally responsive instructional materials statewide.

- High-Quality Instructional Materials are a key lever to executing the Early Literacy School Success Grants and improving learning outcomes for students and addressing academic disparities for focal student groups. When districts and schools implement high-quality instructional materials, it can significantly improve student learning outcomes.

**Negative Effects/Barriers:**

- Because this adoption would be happening on a faster timeline than past adoptions, this could result in frustrations from publishers, as they will have a quick turnaround time to submit materials.

- This plan results in two adoptions occurring in one year (K-5 ELA and the on-cycle adoption of Health instructional materials). This could cause confusion from districts, who are generally accustomed to one adoption occurring each year.

- Because the adopted list might be expanded mid-cycle, this could result in confusion from districts. For districts who have recently adopted or are currently engaged in the adoption process, this may be frustrating.

**Mitigation:**

- ODE will engage in early and frequent communication to publishers and districts.

**EQUITY IMPACT ANALYSIS**

The goals of the Early Literacy Success Initiative include reducing literacy academic disparities for student groups that have historically experienced academic disparities and increasing access to early literacy learning through support that is research-aligned, culturally responsive, student-centered and family-centered. This review of instructional materials is an opportunity to support those efforts and set a vision of what equitable teaching and learning looks like in K-5 ELA. Equitable access to high quality materials, teaching practices, and expectations will positively impact the educational experience and outcomes for focal student groups. ODE shares the vision of access and equity described by the National Council of Teachers of English:

> "Language and literacy learning are basic human rights and essential tools to deepen every student's consciousness and widen possibilities for all students' access, power, agency, affiliation, and impact, across their lifetimes. Regardless of the communities in which students live or attend school, their backgrounds, or the way they learn, literacy educators must provide all pupils the opportunity to use language and literacy in critical and empowering ways that address and surmount students' varying needs." ***NCTE, Statement on the Opportunity to Learn, 2019***

As mentioned earlier in this docket, the Early Literacy Success School District Grant initiative and new requirements for that grant provide an opportunity to promote the use of high quality, culturally responsive instructional materials statewide. By conducting a state-level instructional materials adoption process, ODE ensures that all school districts have access to a list of vetted, high-quality instructional materials. According to EdReports, "High-quality curriculum allows for students to build knowledge and skills that will prepare and provide opportunities for critical thinking and discourse to engage with the world successfully. Thus we get to the heart of equity and empowerment." (*Nychelle Toussaint, CA EdReports evaluator).* Expanding the approved list for K-5 ELA will support districts in selecting instructional materials that meet Oregon's high standards for alignment to standards, instructional excellence, and cultural responsiveness.

**FISCAL ANALYSIS**

Statewide instructional materials adoption is a process currently funded through publisher fees and supplemented by ODE General Fund when needed. This proposal would require the collection of fees from publishers to conduct the evaluation. However, the fiscal benefits of being on the approved list outweighs the cost of evaluation fees for publishers submitting materials for possible adoption.

# Oregon State Board of Education
# MEETING DATE

AGENDA ITEM:

This proposal will not fiscally impact the agency or districts that have adopted ELA materials on the current cycle set by the Board. However, it may financially benefit districts who have yet to adopt ELA materials by providing a stable contract price for newly adopted materials.

**EFFECT OF A "YES" OR "NO" VOTE**

YES – ELA will be added to the 2024 adoption schedule and ODE will subsequently present the proposed list of additionally adopted materials for ELA in October 2024.

NO – ELA will **not** be added to the 2024 adoption schedule and the next ELA adoption will take place in 2027.

**STAFF RECOMMENDATION**

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

**ATTACHMENTS**

- Oregon Instructional Materials Adoption Schedule PDF

# Updating ELA 2021 Instructional Materials Adopted List

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**Jenna Montgomery-** Instructional Materials Coordinator (she/her)

**Alexa Pearson -** Director Standards and Instructional Support (she/her)

***Office of Teaching, Learning, and Assessment***

# Purpose

Request the revision of ODE's Instructional Materials Adoption Cycle by **adding K-5 English Language Arts to the 2024 adoption schedule**.

- OAR 581-011-0071 gives the State Board of Education the authority to revise the instructional materials cycle.



# Rationale- Support Early Literacy Success Initiatives




With the passage of **HB 3198,** the **Early Literacy Success School District Grants**, and **ODE's release of Oregon's Early Literacy Framework:**

- Districts may use grant dollars to purchase and implement research-aligned, culturally relevant ELA curriculum (per statute).
- Starting in January 2025:
  - Funds from the Early Literacy Success School District Grant used for instructional materials **may only be used for materials from the SBE adopted list.**

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# Background- Instructional Materials

- Instructional materials are regularly adopted by the State Board of Education on a **7-year subject matter cycle.**
- In February 2020, the Board adopted instructional materials criteria for ELA.
  - Current ELA contract period: February 1, 2022-February 1, 2028
- The **State Board has the authority to revise the Subject Matter Cycle** to meet the needs of Oregon districts and students.
  - Recent revisions: ELA (2020) and Physical Education (2022)

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# Requested Action



- **Add K-5 ELA to the 2024 adoption schedule** to expand the current ELA State Board approved list

# Additional Information

- Existing criteria used to evaluate instructional materials would remain the same.
- No instructional materials currently on the 2021 SBE-adopted list will be removed or reevaluated.
- Any materials added to the SBE list would have a contract period ending in 2028.
- Districts using materials on the current list **do not need to** re-adopt or be concerned that the materials in use will be removed from the State Board adopted list.

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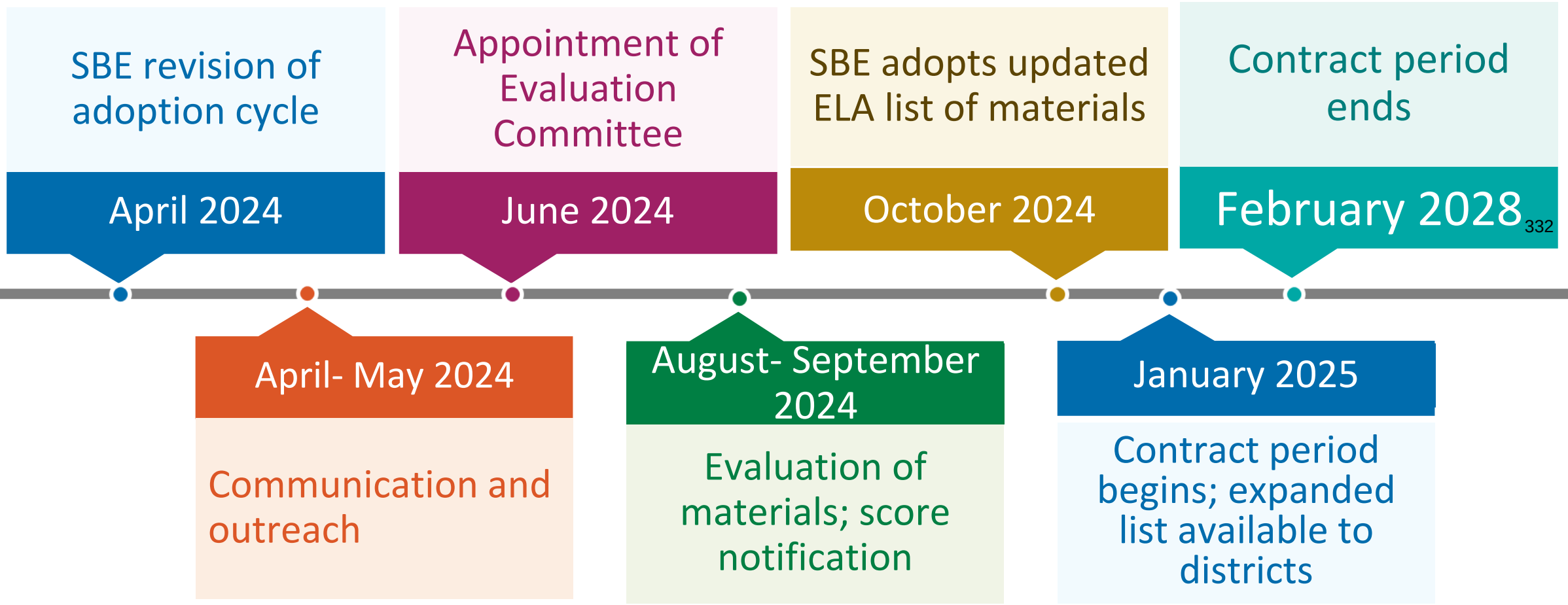
# What Would this Mean for Districts?

- Ensure that districts and charters schools eligible for the Early Literacy Success funds **have a wider variety of high-quality K-5 ELA instructional materials** to choose from on the State Board approved list
- Promote the use of **high-quality, research-aligned, and culturally responsive instructional materials** statewide.



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# Adoption Timeline



# Why Expedite the Timeline?

- As defined in rule ( OAR 581-011-0070), the **SBE has until October 31st to adopt instructional materials** each year.
- Expediting the timeline for this action will ensure that:
  - Publishers have time to submit materials/ essential documents
  - Communication and outreach to districts can occur
  - ODE has time to recruit/ appoint evaluation committees
  - Evaluation of materials can occur
  - Expanded list of materials is available for districts by January 2025

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# Questions?

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Chapter 581

Division 16

OREGON SCHOOL FOR THE DEAF

581-016-0710

High School Requirements for Graduation

In order for a student to graduate from the Oregon School for the Deaf (OSD), he/she must attain a certain number of units, master essential learning skills, meet competencies, and maintain/attain attendance minimums. Four different diplomas/certificates are available, depending on the goals and abilities of each student.

(1) To receive a diploma the student must:

(a) Meet the requirements specified for a diploma in 581-022-2000;

(b) Meet all OSD-required competencies in language, reading, and mathematics; and

(c) Maintain required attendance.

(2) To receive a modified diploma the student must:

(a) Meet the requirements specified for a modified diploma in 581-022-2010;

(b) Complete modified course work as agreed upon in the IEP;

(c) Have satisfactory progress in school; and

(d) Maintain required attendance.

(3) To receive an extended diploma the student must meet the requirements specified for an extended diploma in 581-022-2015

(4) ~~To receive an alternative certificate of IEP completion the student must meet the requirements specified in 581-022-2020 and complete the IEP goals. The certificate may be issued even if the student has not completed 22 units and has not maintained the required days of attendance~~A certificate of attendance may be awarded to a student who does not satisfy the requirements for a regular diploma, a modified diploma or an extended diploma if the student has maintained regular full-time attendance for at least four years beginning in grade nine and meets requirements specified in OAR 581-022-2020..

(5) Notwithstanding anything else in this rule, the Oregon School for the Deaf must award a diploma, modified diploma, extended diploma, or alternative certificate to students who were first enrolled in ninth grade in the 2016-17 school year or earlier or were first enrolled in ninth grade in the 2017-18 school year and had an early graduation plan approved before March 17, 2020, and fulfill the state requirements as described in 581-022-0103.

Statutory/Other Authority: ORS 343 & 346

Statutes/Other Implemented: ORS 346.010

History:

ODE 31-2020, amend filed 06/24/2020, effective 06/24/2020

ODE 19-2020, temporary amend filed 04/23/2020, effective 04/23/2020 through 10/19/2020

EB 31-1989, f. & cert. ef. 11-2-89

Chapter 581

Division 22

STANDARDS FOR PUBLIC ELEMENTARY AND SECONDARY SCHOOLS

581-022-2000

Diploma Requirements

(1) Each district school board and public charter school with jurisdiction over high school programs shall award diplomas to all students who fulfill all state requirements as described in sections (2) to (8) of this rule and all local school district requirements as described in district school board policies or all public charter school requirements as described in the policies or charter of the public charter school.

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

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

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

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

(C) Science — 3;

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

(E) Health Education — 1;

(F) Physical Education — 1;

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

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

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

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

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

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

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

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

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

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

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

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

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

(3) Unit of Credit Requirements for students who were first enrolled in grade 9 during the 2022–2023 school year or first enrolled in grade 9 in any subsequent school year:

(a) Each student shall earn a minimum of 24 units of credit aligned to the Oregon State Board adopted standards to include:

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

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

(C) Science — 3;

(D) Social Sciences 3 — (shall include 0.5 unit of US civics credit in addition to at least 2.5 units of credit aligned to the Oregon State Board adopted standards for U.S. history, world history, geography, economics, and financial literacy);

(E) Health Education — 1;

(F) Physical Education — 1;

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

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

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

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

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

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

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

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

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

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

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

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

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

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

(5) School districts shall develop a process that provides each student the opportunity to develop an education plan and build an education profile in grades 7 through 12 with adult guidance. The plan and profile shall be reviewed and updated periodically (at least annually) and be supported by a Comprehensive Guidance Program as defined in OAR 581-022-2060.

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

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

(A) Identifies personal and career interests;

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

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

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

(i) Appropriate coursework and learning experiences;

(ii) Identified career-related learning experiences; and

(iii) Identified extended application opportunities.

(b) Through the education profile each student shall:

(A) Monitor progress and achievement toward standards including:

(i) Content standards;

(ii) Essential skills;

(iii) Extended application standard; and

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

(B) Document other personal accomplishments determined by the student or school district.

(C) Review progress and achievement in subsection (b)(A) and (B) of this subsection at least annually.

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

(8) Each student shall participate in career-related learning experiences outlined in the education plan (as defined in OAR 581-022-0102);

(9) Notwithstanding sections (1) to (8) of this rule, each district school board or public charter school governing board with jurisdiction over high school programs shall award a modified diploma to those students who have demonstrated the inability to meet the full set of academic content standards even with reasonable modifications and accommodations and who fulfill all requirements as described in OAR 581-022-2010.

(10) Notwithstanding sections (1) to (8) of this rule, each district school board or public charter school governing board with jurisdiction over high school programs shall award an extended diploma to those students who have demonstrated the inability to meet the full set of academic

content standards even with reasonable modifications and accommodations and who fulfill all requirements as described in OAR 581-022-2015.

(11) Notwithstanding sections (1) to (8) of this rule and as provided in OAR 581-022-2020, schools districts and public charter schools shall make a~~n alternative~~ certificate of attendance available to students as an alternative for students who do not obtain the regular diploma, modified diploma or extended diploma.

(12) Attendance Requirements:

(a) Twelve school years shall be required beginning with grade 1, except when the school district adopts policies providing for early or delayed completion of all state and school district credit and performance requirements;

(b) Notwithstanding subsection (a) of this section, a student may satisfy the requirements of sections (2)(6) of this rule in less than four years. If the school district or public charter school has the consent of the student's parent or guardian, a school district or public charter school shall award a diploma to a student upon request from the student, if the student satisfies the requirements for the diploma that apply to the student based on the date of graduation of the student or the school year when the student first enrolled in grade 9, as applicable.

(c) If a school district or public charter school has the consent of a student's parent or guardian, the school district or public charter school may advance the student to the next grade level if the student has satisfied the requirements for the student's current grade level.

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

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

(B) 18 years of age or older.

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

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

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

Statutory/Other Authority: ORS 326.051 & 329.451

Statutes/Other Implemented: ORS 326.051, 329.451 & 339.280

History:

ODE 42-2022, minor correction filed 08/25/2022, effective 08/25/2022

ODE 22-2022, amend filed 04/26/2022, effective 04/26/2022

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ODE 21-2018, amend filed 06/05/2018, effective 06/06/2018

ODE 3-2018, amend filed 01/30/2018, effective 01/30/2018

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ODE 45-2014, f. & cert. ef. 12-17-14

ODE 20-2009, f. & cert. ef. 12-10-09

ODE 5-2009(Temp), f. 6-29-09, cert. ef. 6-30-09 thru 12-22-09

ODE 18-2008, f. & cert. ef. 6-27-08

ODE 18-2007, f. & cert. ef. 9-10-07

ODE 18-2006, f. 12-11-06, cert. ef. 12-12-06

ODE 12-2002, f. & cert. ef. 4-15-02

EB 2-1997, f. 3-27-97, cert. ef. 9-1-97

Chapter 581

Division 22

STANDARDS FOR PUBLIC ELEMENTARY AND SECONDARY SCHOOLS

581-022-2010

Modified Diploma

(1) Definitions. As used in this rule:

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

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

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

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

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

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

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

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

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

(B) A documented history of a medical condition that creates a barrier to achievement.

(b) A student shall have the opportunity to meet the requirements of a modified diploma by the later of:

(A) Four years after starting grade nine; or

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

(c) A student may complete the requirements for a modified diploma in less than four years if the parent/guardian or adult student gives consent.

(A) The consent must be written and must clearly state that the parent/guardian or adult student is waiving the 4 years to complete the requirements for a modified diploma.

(B) A copy of all consents must be sent to the district superintendent.

(C) Each school district must annually provide the number of consents obtained to the State Superintendent of Public Instruction.

(D) The consent may not be used to allow a student to satisfy the requirements for a modified diploma in less than three years.

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

(e) Students currently engaged in the use of illegal drugs are not eligible for a modified diploma if the significant learning and instructional barriers are due to the use of illegal drugs.

(f) Students currently engaged in the illegal use of alcohol are not eligible for a modified diploma if the significant learning and instructional barriers are due to the alcohol abuse, regardless of whether that student is disabled under Section 504 on the basis of alcoholism.

(g) Notwithstanding paragraph (c) and (d) of this section, a school district or public charter school may grant eligibility for a modified diploma to a student who is no longer engaging in illegal use of drugs or alcohol if the student:

(A) Has successfully completed a supervised drug or alcohol rehabilitation program and are no longer engaged in the illegal use of drugs or alcohol; or

(B) Has been rehabilitated successfully and is no longer engaged in the illegal use of drugs or alcohol; or

(C) Is participating in a supervised rehabilitation program and is no longer engaging in the illegal use of drugs or alcohol.

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

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

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

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

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

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

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

(d) ~~Beginning in grade five, school district and public charter schools shall annually provide information to the parents or guardians of a student taking an alternate assessment of the availability of a modified diploma and the requirements for the modified diploma.~~ For students with a documented history described in subsection 3a of this section, the following information must be provided annually, beginning in grade five or after such a documented history has been established:

i. Information about the availability of high school diplomas, modified diplomas and the requirements for the diplomas; and

ii. a disclosure that a student awarded a certificate of attendance will not be counted as a high school graduate in any reporting for the state or school district and that the student awarded a certificate of attendance may not indicate that the student received a high school diploma on applications for employment, military service, financial aid, admittance to an institution of higher education or any other purpose.

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

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

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

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

(A) Language Arts — 3;

(B) Mathematics — 2;

(C) Science — 2;

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

(E) Health Education — 1;

(F) Physical Education — 1; and

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

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

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

(B) Professional technical education;

(C) Electives; and

(D) Career development.

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

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

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

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

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

(7) A school district or public charter school shall award a regular diploma under OAR 581-022-2000 if all requirements for a regular diploma are met. Completion of one or more modified courses shall not prohibit a student from earning a regular diploma; however, required core courses taken under modified conditions must be retaken under standard conditions to be counted toward a regular diploma.

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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

Statutory/Other Authority: ORS 329.451

Statutes/Other Implemented: ORS 329.451

History:

ODE 15-2022, amend filed 03/24/2022, effective 03/24/2022

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ODE 45-2014, f. & cert. ef. 12-17-14

ODE 4-2012, f. 2-1-12, cert. ef. 2-3-12

ODE 22-2009, f. & cert. ef. 12-10-09

ODE 15-2008, f. & cert. ef. 5-23-08

Chapter 581

Division 22

STANDARDS FOR PUBLIC ELEMENTARY AND SECONDARY SCHOOLS

581-022-2015

Extended Diploma

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

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

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

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

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

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

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

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

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

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

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

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

(A) Two credits of mathematics;

(B) Two credits of language arts;

(C) Two credits of science;

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

(E) One credit of health;

(F) One credit of physical education; and

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

(b) Have a documented history of:

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

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

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

(D) One credit of the arts or a world language;

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

(A) Four years after starting grade nine; or

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

(b) A student may complete the requirements for an extended diploma in less than four years if the parent/guardian or adult student gives consent. The consent must be written and must clearly state that the parent/guardian or adult student is waiving the 4 years to complete the requirements for an extended diploma. A copy of all consents must be sent to the district superintendent. Each school district must annually provide the number of consents obtained to the State Superintendent of Public Instruction. The consent may not be used to allow a student to satisfy the requirements for an extended diploma in less than three years.

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

(a) Ensure that all students have on-site access to the appropriate resources and courses to achieve an extended diploma at each high school in the school district or at the public charter

school. ~~or beginning after a documented history described in section (5)(b) above has been established, annually provide to the parents or guardians of a student who has the documented history, described above, information about the availability of an extended diploma and the requirements for the extended diploma.~~

(b) For students with a documented history described in subsection 5b of this section, the following information must be provided annually, beginning in grade five or after such a documented history has been established:

i. Information about the availability of high school diplomas, modified diplomas and the requirements for the diplomas; and

ii. a disclosure that a student awarded a certificate of attendance will not be counted as a high school graduate in any reporting for the state or school district and that the student awarded a certificate of attendance may not indicate that the student received a high school diploma on applications for employment, military service, financial aid, admittance to an institution of higher education or any other purpose.

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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

Statutory/Other Authority: ORS 326.051

Statutes/Other Implemented: ORS 329.451

History:

ODE 15-2022, amend filed 03/24/2022, effective 03/24/2022

ODE 37-2018, amend filed 11/21/2018, effective 11/23/2018

Renumbered from 581-022-1133 by ODE 16-2017, f. & cert. ef. 7-5-17

ODE 43-2016, f. & cert. ef. 9-6-16

ODE 29-2016, f. & cert. ef. 4-28-16

ODE 45-2014, f. & cert. ef. 12-17-14

ODE 44-2014, f. & cert. ef. 12-17-14

ODE 3-2012, f. 2-1-12, cert. ef. 2-3-12

ODE 21-2009, f. & cert. ef. 12-10-09

Chapter 581

Division 22

STANDARDS FOR PUBLIC ELEMENTARY AND SECONDARY SCHOOLS

581-022-2020

~~Alternative~~ Certificate of Attendance

(1) Definitions.

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

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

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

(2) A School district or public charter school shall award a~~n alternative~~ certificate of attendance to a student who does not satisfy the requirements for a high school diploma, a modified diploma or an extended diploma if the student has maintained regular full time attendance for at least four years beginning in grade nine.

(3)(a) Each district school board or public charter school governing board with jurisdiction over high school programs shall define criteria for a~~n alternative~~ certificate of attendance and shall award a~~n alternative~~ certificate of attendance to those students who have met the criteria requirements as described in district school board policies.

(4) A student shall have the opportunity to meet the requirements of a~~n alternative~~ certificate of attendance by the later of:

(a) Four years after starting grade nine; or

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

(c) A student may complete the requirements for a~~n alternative~~ certificate of attendance in less than four years if the parent/guardian or adult student gives consent.

(A) The consent must be written and must clearly state that the parent/guardian or adult student is waiving the 4 years to complete the requirements for a~~n alternative~~ certificate of attendance.

(B) A copy of all consents must be sent to the district superintendent.

(C) Each school district must annually provide the number of consents obtained to the State Superintendent of Public Instruction

(D) The consent may not be used to allow a student to satisfy the requirements for a~~n alternative~~ certificate of attendance in less than three years.

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

(a) Ensure that all students have on-site access to the appropriate resources and courses to ~~achieve~~ be awarded a~~n alternative~~ certificate of attendance at each high school in the school district or at the public charter school.

(b) ~~Beginning grade five, annually provide information to the parents or guardians of a student taking an alternate assessment of the availability of an alternative certificate and the requirements for the certificate~~For students with a documented history described in subsection 5b

of this section, the following information must be provided annually, beginning in grade five or after such a documented history has been established:

i. Information about the availability of high school diplomas, modified diplomas and the requirements for the diplomas; and

ii. a disclosure that a student awarded a certificate of attendance will not be counted as a high school graduate in any reporting for the state or school district and that the student awarded a certificate of attendance may not indicate that the student received a high school diploma on applications for employment, military service, financial aid, admittance to an institution of higher education or any other purpose.

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(6) Each student receiving a~~n alternative~~ certificate of attendance shall have the option of participating in the high school graduation ceremony with the members of their class receiving a high school diploma.

(7)(a) A student who receives a~~n alternative~~ certificate of attendance shall have access to instructional hours, hours of transition services and hours of other services that are designed to meet the unique needs of the student.

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

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

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

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

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

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

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

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

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

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

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

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

Statutory/Other Authority: ORS 329.451

Statutes/Other Implemented: ORS 329.451

History:

Renumbered from 581-022-1135 by ODE 16-2017, f. & cert. ef. 7-5-17

ODE 5-2012, f. 2-1-12, cert. ef. 2-3-12

ODE 23-2009, f. & cert. ef. 12-10-09

ODE 15-2008, f. & cert. ef. 5-23-08

Chapter 581

Division 23

SCHOOL FINANCE

581-023-0008

Accountable Activities for Alternative Education Programs

(1) For purposes of determining class group size for alternative education programs, instruction must be provided by a teacher as defined in OAR 581-023-0006. For purposes of determining class group size, instruction may not be provided by an “Educational Assistant” or “Instructional Assistant” who provides support to a teacher.

(2) Alternative education programs must provide accountable activities. Accountable activities are defined as one or more of the following as approved by the school district by contract:

(a) Tutorial Instruction;

(b) Small group instruction;

(c) Large group instruction;

(d) Personal growth and development instruction;

(e) Counseling and guidance;

(f) Computer assisted instruction;

(g) Vocational training;

(h) Cooperative work experience and/or supervised work experience;

(i) Instructional activities provided by institutions accredited by the Northwest Association of Schools and Colleges;

(j) Supervised community service activities performed as part of the instructional program; and

(k) Supervised independent study in accordance with a student's educational goals including classroom or equivalent work supervised by school district officials that serve as one component of the student's educational plan and profile and not the entire part. Examples of this include required and elective courses, supervised independent study, career-related learning experiences, and project based learning.

(3) Programs must provide instruction based on academic content standards adopted by the State Board of Education and must ensure students participate in district and state assessments of achievement for the grade level(s) the program serves and must:

(a) Assist the district in meeting its comprehensive K–12 instructional program in compliance with OAR 581-022-2030,

(b) Assist the district in awarding a High School Diploma according to ORS 329.451 and 581-022-2000, Modified Diploma described in OAR 581-022-2010, or ~~Alternative~~ Certificate of Attendance described in 581-022-2020, to a student who completes the requirements established by the State Board of Education and the school district,

(c) Assist student in demonstrating Proficiency in Core or Academic Content Standards, and Essential Skills in accordance with OAR 581-022-2025,

(d) Provide evidence of academic progress included and maintained by the resident school district in the student's permanent record, as defined by OAR 581-021-0250,

(e) Provide a course of study and activities that are correlated with the academic content standards in accordance with OAR 581-022-2030,

(f) Provide National Education Statistics Course Codes and Descriptions for Secondary Courses where academic credit is offered.

(4) Programs must provide teachers as defined in OAR 581-023-0006 and educational assistants as defined in ORS 342.120. Provide teachers as defined in OAR 581-023-0006 and educational assistants as defined ORS 342.120.

Statutory/Other Authority: ORS 36.051 & 336.635

Statutes/Other Implemented: ORS 327.125 & 336.615 - 336.665

History:

ODE 110-2019, minor correction filed 08/27/2019, effective 08/27/2019

ODE 23-2008, f. 8-28-08, cert. ef. 8-29-08

EB 34-1987, f. & ef. 12-11-87

# Oregon State Board of Education
# April 18, 2024
AGENDA ITEM: 6.A.

| | |
|---|---|
| **SUBJECT:** SB 992: Diploma Options<br>**STAFF NAME & OFFICE**: OESO: Shava Feinstein, Don Dorman, Eric Wells<br><br>Senate Bill (SB) 992 (2023) repealed the alternative certificate and introduced a certificate of attendance as a high school completion option. Current Oregon Administrative Rules (OARs) provide a pathway to an alternative certificate but not to a certificate of attendance. OARs need to be updated to be in alignment with statutory changes.<br><br>☐ New Rule<br>☒ Amend Existing Rule<br>☐ Repeal Rule | ☒ **First Reading**<br>☒ **Presentation**<br>☐ **No Presentation**<br>☐ **Action**<br>☐ **Temp Rule**<br>☐ **Presentation**<br>☐ **No Presentation** |

## BACKGROUND

### History and Purpose

SB 992 (2023) created new provisions in Oregon Revised Statutes (ORS) related to high school completion options. ODE is proposing rule updates to align existing OARs with the new provisions established in SB 992.

Prior to January 1, 2024, Oregon students attended high school in pursuit of a standard, modified, or extended diploma and – if they did not satisfy the requirements for one of those diplomas – may still have met requirements for and been granted an alternative certificate. The awarding of an alternative certificate was subject to the requirements established by the board of the school district or public charter school.

Starting January 1, 2024, SB 992 removed the option for school districts to award an alternative certificate. Instead, if they are eligible, students who do not satisfy the requirements for a diploma can be awarded a certificate of attendance. In order to be eligible for a certificate of attendance, students must have: (1) maintained regular full-time attendance for at least four years beginning in grade nine and (2) met requirements established by the board of the school district or public charter school.

Current OARs reflect high school completion options that existed prior to the enactment of SB 992, but do not yet align with the requirements established in SB 992. Accordingly, the following OARs must be updated to align with ORS requirements established by SB 992:

- **581-022-2000: Diploma Requirements** (First effective 9/97; Last amendment effective 4/22; Minor correction effective 8/22)
- **581-022-2010: Modified Diploma** (First effective 5/08; Last amendment effective 3/22)
- **581-022-2015: Extended Diploma** (First effective 12/09; Last amendment effective 3/22)
- **581-022-2020: Alternative Certificate** [to be renamed **Certificate of Attendance**] (First effective 5/08; Last amendment effective 2/12; Renumbered 7/17)
- **581-023-0008: Accountable Activities for Alternative Education Programs** (First effective 12/87; Last amendment effective 8/08; Minor correction effective 8/19)

- **581-016-0710: High School Requirements for Graduation** [Oregon School for the Deaf] (First effective 9/97; Last amendment effective 4/22)

In each of these rules, references to alternative certificates have been replaced with references to certificates of attendance. In addition, the rules for Modified Diploma, Extended Diploma, and Alternative Certificate (to be renamed 'Certificate of Attendance') include the specific parent notification and reporting requirements for each of those options as established in SB 992. Each of these rules also adds the requirement established in SB 992 for all public high schools and public charter schools to offer courses on site which are needed for diploma completion.

In sum, the requested changes replace references to the "alternative certificate" with reference to a "certificate of attendance" as an option for high school completion when a student is unable to obtain a regular, modified, or extended diploma. They also establish the requirements to obtain a "certificate of attendance" and ensure the provisions of SB 992 are included within applicable OARs.

**Board Discretion**

ODE is only proposing statutorily required changes. Accordingly, there are no areas of discretion for the Board within the current recommended updates. However, the Board has the discretion to recommend additional updates beyond the proposed revisions.

**Partner Engagement / Community Input and Voice**

Thoughtful community engagement was designed to ensure feedback from the greatest number of partners and impacted individuals possible was incorporated into the revisions being proposed today. The engagement included a survey highlighting the proposed changes and providing an opportunity to voice questions and concerns. Survey outreach focused on special education directors, parents, support agencies, special educators, and education partners such as the Rules Advisory Committee (RAC), State Advisory Council for Special Education (SACSE), ODE District Support Specialists (DSS), and Regional Technical Assistance Providers (RTAPs). Our team also requested that agencies and districts share the opportunity to send feedback to the SB 992 community input site with their partners through their established engagement channels. Through these efforts, over 125 people provided helpful feedback and suggestions on the draft rules.

## SUMMARY OF PREVIOUS BOARD ACTION

This issue has not been before the State Board of Education previously.

## HAS THE RULE CHANGED SINCE LAST BOARD MEETING?

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

# Oregon State Board of Education
# April 18, 2024
AGENDA ITEM: 6.A.

**POLICY ISSUE OR CONCERNS**

SB 992 addresses policy issues related to students who are unable to satisfy the requirements for Oregon diplomas. Accordingly, ODE's community engagement outreach for these proposed rule revisions primarily sought input from staff, parents, caregivers, and students who have experience related to navigating Oregon's graduation requirements. ODE specifically sought input from individuals knowledgeable about and experienced with pursuing graduation for students with disabilities, as this group of students has historically been impacted by ableism, which results in reduced graduation opportunities. Tribal consultation was not conducted.

Regular full-time attendance is not defined in SB 992 or in the proposed revisions to OAR 581-022-2020 (Alternative Certificate, which ODE is proposing renaming to Certificate of Attendance). School districts will accordingly need to make appropriate fact-specific determinations related to regular full-time attendance prior to awarding a certificate of attendance. As such, the requirement for regular full-time attendance for at least four years beginning in grade nine could present a barrier for students who receive homebound instruction and students who have been homeschooled for any portion of their secondary education. This could result in the unintended consequence of a student not being eligible to earn a certificate of attendance where prior statutory authorities could have allowed for an alternative certificate.

**EQUITY IMPACT ANALYSIS**

These rule revisions address the needs of historically underserved communities by implementing the provisions of SB 992, such as:

- Clarifying the obligation of local school districts and public charter schools to ensure on-site access to resources and courses necessary for all students to satisfy diploma requirements for regular, modified, and extended diplomas at each high school and public charter school.
- Creating the option to leave high school with a certificate of attendance for students who do not satisfy the requirements for a regular, modified, or extended diploma but who have met local requirements for the certificate and maintained regular full-time attendance for at least four years beginning in grade nine.
- Requiring the annual notification and disclosure of specific information to parents of students with a documented history of (a) an inability to maintain grade level achievement due to significant learning and instructional barriers or (b) a medical condition that creates a barrier to achievement.

These changes reaffirm equitable opportunity for high school and public charter school students by (a) clarifying the requirement for on-site resources and courses necessary to satisfy diploma requirements, and (b) ensuring that parents and adult students are better informed of the diploma options, the differences between them and the certificate of attendance, and the consequences of receiving a certificate of attendance, as follows:

- A student awarded a certificate of attendance will not be counted as a high school graduate in any reporting for the state or school district.

- A student awarded a certificate of attendance may not indicate that they received a high school diploma on applications for employment, military service, financial aid, admittance to an institution of higher education or any other purpose.

Overall, these updates help to ensure Oregon's high school completion options are equitable, accessible, inclusive, and in line with Oregon law. It is important to note that students with circumstances that have precluded full time, regular attendance or achieving requirements of any of the diploma options will no longer receive a state diploma or certificate of any kind under these required updates.

Local school boards will be required to pass policy defining the requirements to obtain a certificate of attendance. However, local school district policies must require regular full-time attendance and may not be less stringent than the rules outlined in SB 992 for a certificate of attendance. Local school districts may also consider developing alternate methods for recognizing students who did not meet any of the state-established high school completion options. Local school districts also have the discretion to make provisions for students to participate in graduation ceremonies as determined appropriate.

**FISCAL ANALYSIS**

ODE will need to provide updated resources, training, and technical assistance related to these updated requirements. ODE can complete this work with existing FTE. Districts and ESDs will need to provide annual current information about diploma options. Schools and ESDs will need to update their policies around this topic, however the fiscal impact is expected to be minimal and absorbable. The proposed rule has no other identified fiscal impacts.

**EFFECT OF A "YES" OR "NO" VOTE**

There is no vote for today's presentation as it is the first read. However, ODE anticipates asking the Board to adopt these rules on May 16, 2024, following any further engagement or work requested by the Board following today's presentation.

As the draft rules currently exist, the effect of your vote would be as follows:

- **YES**: A "yes" vote would update OAR 581-022-2020, OAR 581-022-2010, OAR 581-022-2015, OAR 581-022-2000, 581-016-0710 and OAR 581-023-0008 to align with the requirements of SB 992 (2023).

  Specific changes that would be implemented by a "yes" vote by OAR include:

  - **OAR 581-022-2020:** Removal of alternative certificate; addition of certificate of attendance. Outlines specific notifications to parents and reporting requirements. Adds requirements for all public high schools and public charter schools to offer courses onsite which are needed for diploma completion.
  - **OAR 581-022-2000:** Changes alternative certificate references to certificate of attendance.

  - **OAR 581-022-2010:** Changes alternative certificate references to certificate of attendance. Outlines specific notifications to parents and reporting requirements. Adds requirements for all public high schools and public charter schools to offer courses onsite which are needed for diploma completion.
  - **OAR 581-022-2015:** Changes alternative certificate references to certificate of attendance. Outlines specific notifications to parents and reporting requirements. Adds requirements for all public high schools and public charter schools to offer courses onsite which are needed for diploma completion.
  - **OAR 581-023-0008:** Changes alternative certificate references to certificate of attendance.
  - **OAR 581-016-0710:** Changes alternative certificate references to certificate of attendance for OSD.

- **NO**: A "no" vote would maintain OARs as they currently exist and would not bring them into alignment with current Oregon Revised Statutes (ORS). Because these changes are non-discretionary, in the event of a "no" vote, ODE would continue working with the Board to address any concerns resulting in the "no" vote. Ultimately, ODE will need to continue working with the Board to revise the OARs in a manner that aligns both with the Board's desires and ORS requirements following the enactment of SB 992.

## STAFF RECOMMENDATION

☐ Approve ☒ Approve next month ☐ No recommendation at this time
***Prompted by:*** ☒ State law changes ☐ Federal law changes ☐ Other

## ATTACHMENTS

- Attachment 1: 581-022-2000: Diploma Requirements
- Attachment 2: 581-022-2010: Modified Diploma
- Attachment 3: 581-022-2015: Extended Diploma
- Attachment 4: 581-022-2020: Alternative Certificate [to be renamed Certificate of Attendance]
- Attachment 5: 581-023-0008: Accountable Activities for Alternative Education Programs
- Attachment 6: 581-016-0710: High School Requirements for Graduation

**581-022-2055**
**Career Education**

Each school district shall implement plans for career education for grades K through 12, as required in OAR 581-022-2030, in conjunction with its Comprehensive School Counseling Program~~part of its comprehensive school counseling program, based on the Oregon Department of Education's Framework for Comprehensive School Counseling Programs~~. Career education curriculum is part of the overall ~~comprehensive school counseling~~district curriculum, written to address Essential Skills, Education Plan and Education Profile, Career Connected Learning, and employability skills, and post-secondary options, and may include career and technical education. ~~and the four interrelated student developmental domains: academic, career, social/emotional, and community involvement.~~

**Statutory/Other Authority:** ORS 326.051 & 329.275
**Statutes/Other Implemented:** ORS 326.051
**History:**
ODE 22-2018, amend filed 06/05/2018, effective 06/06/2018
Renumbered from 581-022-0405 by ODE 16-2017, f. & cert. ef. 7-5-17
ODE 19-2008, f. & cert. ef. 6-27-08
EB 4-1989, f. & cert. ef. 1-23-89
1EB 19-1980, f. 6-17-80, ef. 9-1-81

**581-022-2000**
**Diploma Requirements**

(1) Each district school board and public charter school with jurisdiction over high school programs shall award diplomas to all students who fulfill all state requirements as described in sections (2) to (128) of this rule and all local school district requirements as described in district school board policies or all public charter school requirements as described in the policies or charter of the public charter school.

~~(2) Unit of Credit Requirements for students who were first enrolled in grade 9 during the 2010–2011 school year:~~

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

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

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

~~(C) Science — 3;~~

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

~~(E) Health Education — 1;~~

~~(F) Physical Education — 1;~~

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

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

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

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

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

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

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

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

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

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

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

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

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

(2~~3~~) Unit of Credit Requirements for students who were first enrolled in grade 9 during the 2022–2023 school year or first enrolled in grade 9 in any ~~subsequent~~ previous school year:

(a) Each student shall earn a minimum of 24 units of credit aligned to the Oregon State Board adopted standards to include:

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

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

(C) Science — 3;

(D) Social Sciences ~~3~~ — 3 (shall include 0.5 unit of US civics credit in addition to at least 2.5 units of credit aligned to the Oregon State Board adopted standards for U.S. history, world history, geography, economics, and financial literacy);

(E) Health Education — 1;

(F) Physical Education — 1;

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

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

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

(3) Unit of Credit Requirements for students who were first enrolled in grade 9 during the 2023-24 school year or first enrolled in grade 9 in any subsequent school year:

(a) Each student shall earn a minimum of 24 units of credit aligned to the Oregon State Board adopted standards to include:

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

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

(C) Science — 3;

(D) Social Sciences — 3 (shall include 0.5 unit of US civics credit in addition to at least 2.5 units of credit aligned to the Oregon State Board adopted standards for U.S. history, world history, geography, and economics);

(E) Health Education — 1;

(F) Physical Education — 1;

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

(H) Personal Financial Education — 0.5

(I) Higher Education & Career Path Skills — 0.5

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

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

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

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

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

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

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

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

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

(5e) A school district or public charter school must accept any credits earned by students qualified for the additional district credit requirements waiver in another school district or public charter school and must apply them toward the 24 Units of Credit Requirements for the diploma.

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

(7~~9~~) Course syllabi shall be written for courses in grades 9 through 12 and shall be available to students, staff, parents, the district school board and other interested individuals.

(8~~4~~) Each student shall demonstrate proficiency in essential skills adopted by the State Board of Education as provided in OAR 581-022-2115;

(9~~5~~) School districts shall develop a process that provides each student the opportunity to develop an education plan and build an education profile in grades 7 through 12 with adult guidance. The plan and profile shall be reviewed and updated periodically (at least annually) and be supported by a Comprehensive ~~Guidance~~ School Counseling Program as defined in OAR 581-022-2060.

(10~~6~~) Each student shall develop an education plan and build an education profile.

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

(A) Identifies personal and career interests;

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

(C) Sets goals to prepare for transitions to next steps identified in section (10~~7~~)(b);

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

(i) Appropriate coursework and learning experiences;

(ii) Identified career-related learning experiences; and

(iii) Identified extended application opportunities.

(b) Through the education profile each student shall:

(A) Monitor progress and achievement toward standards including:

(i) Content standards;

(ii) Essential skills;

(iii) Extended application standard; and

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

(B) Document other personal accomplishments determined by the student or school district.

(C) Review progress and achievement in subsection (b)(A) and (B) of this subsection at least annually.

(11~~7~~) Each student shall build a collection of evidence, or include evidence in existing collections(s), to demonstrate extended application (as defined in OAR 581-022-0102);

(12~~8~~) Each student shall participate in career-related learning experiences outlined in the education plan (as defined in OAR 581-022-0102);

(13~~9~~) Notwithstanding sections (1) to (12~~8~~) of this rule, each district school board or public charter school governing board with jurisdiction over high school programs shall award a modified diploma to those students who have demonstrated the inability to meet the full set of academic content standards even with reasonable modifications and accommodations and who fulfill all requirements as described in OAR 581-022-2010.

(14~~0~~) Notwithstanding sections (1) to (12~~8~~) of this rule, each district school board or public charter school governing board with jurisdiction over high school programs shall award an extended diploma to those students who have demonstrated the inability to meet the full set of academic content standards even with reasonable modifications and accommodations and who fulfill all requirements as described in OAR 581-022-2015.

(15~~1~~) Notwithstanding sections (1) to (12~~8~~) of this rule and as provided in OAR 581-022-2020, schools districts and public charter schools shall make a~~n alternative~~ certificate of attendance available to students as an alternative for students who do not obtain the regular diploma, modified diploma or extended diploma.

(16~~2~~) Attendance Requirements:

(a) Twelve school years shall be required beginning with grade 1, except when the school district adopts policies providing for early or delayed completion of all state and school district credit and performance requirements;

(b) Notwithstanding subsection (a) of this section, a student may satisfy the requirements of sections (2)(6) of this rule in less than four years. If the school district or public charter school has the consent of the student's parent or guardian, a school district or public charter school shall award a diploma to a student upon request from the student, if the student satisfies the requirements for the diploma that apply to the student based on the date of graduation of the student or the school year when the student first enrolled in grade 9, as applicable.

(c) If a school district or public charter school has the consent of a student's parent or guardian, the school district or public charter school may advance the student to the next grade level if the student has satisfied the requirements for the student's current grade level.

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

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

(B) 18 years of age or older.

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

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

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

**Statutory/Other Authority:** ORS 326.051 & 329.451
**Statutes/Other Implemented:** ORS 326.051, 329.451 & 339.280
**History:**
ODE 42-2022, minor correction filed 08/25/2022, effective 08/25/2022
ODE 22-2022, amend filed 04/26/2022, effective 04/26/2022
ODE 15-2022, amend filed 03/24/2022, effective 03/24/2022
ODE 21-2018, amend filed 06/05/2018, effective 06/06/2018
ODE 3-2018, amend filed 01/30/2018, effective 01/30/2018
Renumbered from 581-022-1130 by ODE 16-2017, f. & cert. ef. 7-5-17
ODE 45-2014, f. & cert. ef. 12-17-14
ODE 20-2009, f. & cert. ef. 12-10-09
ODE 5-2009(Temp), f. 6-29-09, cert. ef. 6-30-09 thru 12-22-09
ODE 18-2008, f. & cert. ef. 6-27-08
ODE 18-2007, f. & cert. ef. 9-10-07
ODE 18-2006, f. 12-11-06, cert. ef. 12-12-06
ODE 12-2002, f. & cert. ef. 4-15-02
EB 2-1997, f. 3-27-97, cert. ef. 9-1-97

**581-022-2030**
**District Curriculum**

(1) As used in this rule, "curriculum" means the planned instructional program, which includes the goals, essential skills, academic content standards, instructional materials as defined in OAR 581-011-0050, supplemental resources, instructional methods, and assessments needed to help students develop critical skills and knowledge.

(2~~1~~) Each school district shall provide a planned K–12 instructional program.

(3~~2~~) The planned K–12 instructional program shall include Common Curriculum Goals adopted by the State Board of Education to include: ~~the following:~~

(a) Content Standards as defined in OAR 581-022-0102(10) for the following:~~Common Curriculum Goals and academic content standards adopted by the State Board of Education to include:~~

(A) Language Arts;

(B) Mathematics;

(C) Science;

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

(E) The Arts;

(F) World Languages;

(G) Health Education; ~~and~~

(H) Physical Education; ~~and~~

(I) Comprehensive School Counseling; and

(J) .Social and Emotional Learning;

(b) Additional Common Curriculum Goals for technology;~~.~~

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

(d) Career education as outlined in OAR 581-022-2055, which may include career and technical education.~~-related learning standards, as contained in the Common Curriculum Goals and academic content standards; and~~

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

(4) In addition to the requirements outlined in section (3), each school district offering grades 9 or higher shall provide a planned 9–12 instructional program, which includes the following academic content standards:

(a) Personal Financial Education; and

(b) Higher Education and Career Path Skills.

(5~~3~~) The school district shall also provide instruction in other areas identified in chapter 581, division 22 of the Oregon Administrative Rules, including:

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

(b) Substance use prevention education; and ~~Prevention education in drugs and alcohol; and~~

(c) Emergency plans and safety programs.

(6~~4~~) The school district is also accountable to provide instruction in compliance with requirements set forth in ORS Chapter 336, Conduct of Schools Generally.

**Statutory/Other Authority:** ORS 326.051
**Statutes/Other Implemented:** ORS 329.045
**History:**
ODE 15-2022, amend filed 03/24/2022, effective 03/24/2022
ODE 17-2018, amend filed 06/05/2018, effective 06/06/2018
Renumbered from 581-022-1210 by ODE 16-2017, f. & cert. ef. 7-5-17
ODE 5-2017, f. & cert. ef. 5-2-17
ODE 45-2014, f. & cert. ef. 12-17-14
ODE 25-2008, f. & cert. ef. 9-26-08
ODE 19-2007, f. & cert. ef. 9-10-07
ODE 5-2006, f. & cert. ef. 2-14-06
Reverted to EB 6-1997, f. & cert. ef. 6-9-97
ODE 7-2005(Temp), f. & cert. ef. 3-15-05 thru 9-1-05
EB 6-1997, f. & cert. ef. 6-9-97

**581-022-2010**
**Modified Diploma**

(1) Definitions. As used in this rule:

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

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

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

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

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

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

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

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

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

(B) A documented history of a medical condition that creates a barrier to achievement.

(b) A student shall have the opportunity to meet the requirements of a modified diploma by the later of:

(A) Four years after starting grade nine; or

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

(c) A student may complete the requirements for a modified diploma in less than four years if the parent/guardian or adult student gives consent.

(A) The consent must be written and must clearly state that the parent/guardian or adult student is waiving the 4 years to complete the requirements for a modified diploma.

(B) A copy of all consents must be sent to the district superintendent.

(C) Each school district must annually provide the number of consents obtained to the State Superintendent of Public Instruction.

(D) The consent may not be used to allow a student to satisfy the requirements for a modified diploma in less than three years.

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

(e) Students currently engaged in the use of illegal drugs are not eligible for a modified diploma if the significant learning and instructional barriers are due to the use of illegal drugs.

(f) Students currently engaged in the illegal use of alcohol are not eligible for a modified diploma if the significant learning and instructional barriers are due to the alcohol abuse, regardless of whether that student is disabled under Section 504 on the basis of alcoholism.

(g) Notwithstanding paragraph (c) and (d) of this section, a school district or public charter school may grant eligibility for a modified diploma to a student who is no longer engaging in illegal use of drugs or alcohol if the student:

(A) Has successfully completed a supervised drug or alcohol rehabilitation program and are no longer engaged in the illegal use of drugs or alcohol; or

(B) Has been rehabilitated successfully and is no longer engaged in the illegal use of drugs or alcohol; or

(C) Is participating in a supervised rehabilitation program and is no longer engaging in the illegal use of drugs or alcohol.

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

(b) A school district or public charter school may award a modified diploma to a student only upon the consent of the parent or guardian of the student or upon the consent of the adult student or

emancipated minor student. A district or school must receive the consent in writing and during the school year in which the modified diploma is awarded.

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

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

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

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

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

(d) ~~Beginning in grade five, school district and public charter schools shall annually provide information to the parents or guardians of a student taking an alternate assessment of the availability of a modified diploma and the requirements for the modified diploma.~~ For students with a documented history described in subsection 3a of this section, the following information must be provided annually, beginning in grade five or after such a documented history has been established:

i. Information about the availability of high school diplomas, modified diplomas and the requirements for the diplomas; and

ii. a disclosure that a student awarded a certificate of attendance will not be counted as a high school graduate in any reporting for the state or school district and that the student awarded a certificate of attendance may not indicate that the student received a high school diploma on applications for employment, military service, financial aid, admittance to an institution of higher education or any other purpose.

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

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

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

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

(A) Language Arts — 3;

(B) Mathematics — 2;

(C) Science — 2;

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

(E) Health Education — 1;

(F) Physical Education — 1; and

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

(H) Personal Financial Education – 0.5; and

(I) Higher Education and Career Path Skills – 0.5

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

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

(B) Professional technical education;

(C) Electives; and

(D) Career development.

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

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

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

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

(6) A school district or public charter school shall grant credit toward a modified diploma only for courses that contain substantial academic content. A school district or public charter school shall grant credit for a

modified diploma through a continuum of instruction beginning at basic skills and progressing through high level skills.

(7) A school district or public charter school shall award a regular diploma under OAR 581-022-2000 if all requirements for a regular diploma are met. Completion of one or more modified courses shall not prohibit a student from earning a regular diploma; however, required core courses taken under modified conditions must be retaken under standard conditions to be counted toward a regular diploma.

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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

(15) The unit of credit requirements in section (5h & i ) of this rule for a modified diploma apply to all students who are awarded a modified diploma on or after January 1, 2027.

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

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

**Statutory/Other Authority:** ORS 329.451
**Statutes/Other Implemented:** ORS 329.451
**History:**
ODE 15-2022, amend filed 03/24/2022, effective 03/24/2022
ODE 17-2017, temporary amend filed 10/10/2017, effective 10/10/2017 through 04/08/2018

Renumbered from 581-022-1134 by ODE 16-2017, f. & cert. ef. 7-5-17
ODE 45-2014, f. & cert. ef. 12-17-14
ODE 4-2012, f. 2-1-12, cert. ef. 2-3-12
ODE 22-2009, f. & cert. ef. 12-10-09
ODE 15-2008, f. & cert. ef. 5-23-08

# SB 3 New Draft Rule Language (Option A)

**Course Requirements for Personal Financial Education and Higher Education and Career Path Skills**

(1) Courses that include Personal Financial Education and Higher Education and Career Path Skills content standards shall be taught by educators who possess a valid license issued by the Teacher Standards and Practices Commission in at least one of the following areas:

- (a) Teaching Licenses as found in Atypical Assignments OAR 584-210-0170
- (b) School Counselor License as found in OAR 584-245-0110
- (c) Administrative License as found in OAR 584-235-0030
- (d) Restricted CTE Teaching License as found in OAR 584-230-0040

(2) Districts shall award Personal Financial Education credit and Higher Education and Career Path Skills credit for courses that address all of the State Board Adopted Content Standards for those subjects in accordance with OAR 581-022-2025 Credit Options.

- (a) Districts may award credit in more than one content area for courses that integrate content standards for Higher Education and Career Path Skills and/or Personal Financial Education with other content standards.
- (b) Districts may offer these courses as part of a college-credit granting opportunity, provided the course meets the content standards.

(3) A district or public charter school may request a waiver of the credit requirements described in ORS 329.251 (2)(a)(D) and (E) by demonstrating, to the satisfaction of the Oregon Department of Education, that the district or school is unable to provide courses necessary for students to satisfy the credit requirements due to a lack of educators qualified to provide the courses. If approved, this waiver is for students who will be awarded a high school diploma on or after January 1, 2027 and before January 1, 2028.

- (a) If a district seeks to request a waiver, it shall submit an application to the Department which includes:
  - (A) The reason for seeking a waiver;
  - (B) The subject(s) for which the waiver is sought;
  - (C) The projected dates for implementation of required courses; and
  - (D) Local school board approval of the application and the date of such approval.
- (b) Waivers may be approved at the Oregon Department of Education’s discretion. Denied waivers may be appealed to the State Board of Education.

(c) Waivers must be submitted to the Oregon Department of Education no later than July 1, 2026.

(d) No waivers shall be granted for students graduating on or after January 1, 2028.

# SB 3 Potential New Draft Rules Language (Option B)

**Course Requirements for Personal Financial Education and Higher Education and Career Path Skills**

(1) Courses that include Personal Financial Education and Higher Education and Career Path Skills content standards shall be taught by educators who possess a valid license issued by the Teacher Standards and Practices Commission in at least one of the following areas:

(a) Teaching Licenses as found in Atypical Assignments OAR 584-210-0170

(b) School Counselor License as found in OAR 584-245-0110

(c) Administrative License as found in OAR 584-235-0030

(d) Restricted CTE Teaching License as found in OAR 584-230-0040

(2) Districts shall award Personal Financial Education credit and Higher Education and Career Path Skills credit for courses that address all of the State Board Adopted Content Standards for those subjects in accordance with OAR 581-022-2025 Credit Options.

(a) Districts may award:

(A) Credit in more than one content area for Personal Financial Education courses that integrate other content standards.

(B) Credit in more than one content area for courses that integrate Higher Education and Career Path Skills content standards with other content standards.

(b) Districts may offer these courses as part of a college-credit granting opportunity, provided the course meets the content standards.

(3) A district or public charter school may request a waiver of the credit requirements described in ORS 329.251 (2)(a)(D) and (E) by demonstrating, to the satisfaction of the Oregon Department of Education, that the district or school is unable to provide courses necessary for students to satisfy the credit requirements due to a lack of educators qualified to provide the courses. If approved, this waiver is for students who will be awarded a high school diploma on or after January 1, 2027 and before January 1, 2028.

(a) If a district seeks to request a waiver, it shall submit an application to the Department which includes:

(A) The reason for seeking a waiver;

(B) The subject(s) for which the waiver is sought;

(C) The projected dates for implementation of required courses; and

(D) Local school board approval of the application and the date of such approval.

(b) Waivers may be approved at the Oregon Department of Education's discretion. Denied waivers may be appealed to the State Board of Education.

(c) Waivers must be submitted to the Oregon Department of Education no later than July 1, 2026.

(d) No waivers shall be granted for students graduating on or after January 1, 2028.

# Oregon State Board of Education
# April 18th, 2023

AGENDA ITEM: Senate Bill 3 Rulemaking; New OAR, OAR 581-022-0102, OAR 581-022-2000, OAR 581-022-2010, OAR 581-022-2030, OAR 581-022-2055

| | |
|---|---|
| **SUBJECT:** Senate Bill 3 Rulemaking; New OAR, OAR 581-022-0102, OAR 581-022-2000, OAR 581-022-2010, OAR 581-022-2030, OAR 581-022-2055<br>**STAFF NAME & OFFICE**: Aujalee Moore, Beth Wigham, Alexa Pearson - Office of Teaching, Learning, and Assessment.<br><br>With the passage of Senate Bill 3, beginning with the class of 2027, the Oregon diploma requirements will include 0.5 credit in Personal Financial Education and 0.5 credit in Higher Education and Career Path Skills. The proposed rule revisions and creation of a new rule are necessary to establish and implement the requirements outlined by Senate Bill 3.<br><br>**X** New Rule<br>**X** Amend Existing Rule<br>☐Repeal Rule | **X First Reading**<br>**X Presentation**<br>☐**No Presentation**<br>☐ **Action**<br>☐**Temp Rule**<br>☐**Presentation**<br>☐**No Presentation** |

**BACKGROUND**

In September 2022, ODE released the Community-Informed Recommendations for Equitable Graduation Outcomes Senate Bill 744 Report. One of the recommendations from the Senate Bill 744 Report was to add a requirement for a "Future Planning course…that includes financial planning"; this recommendation provided a foundation for the development of Senate Bill 3 in the 2023 session. Senate Bill 3, requiring a 0.5 credit in Personal Financial Education and a 0.5 credit in Higher Education and Career Path Skills, received broad support from educators, parents, students, and business and community partners.

In June 2023, the Oregon Legislature passed, and Governor Kotek signed Senate Bill 3. Together, this new legislation and the Senate Bill 744 community-informed recommendations for graduation requirements provide momentum to help create more equitable, inclusive, and accessible diploma requirements.

Beginning with the class of 2027, the Oregon diploma requirements will include a 0.5 credit in Personal Financial Education (PFE) and a 0.5 credit in Higher Education and Career Path Skills (HECPS), as part of the existing 24 credit requirements. This requires the development of new standards designed to support students in developing skills they will need to be successful in their future lives.

Senate Bill 3 updated ORS 329.451 with the aforementioned credit requirements and authorized the State Board of Education to adopt by rule requirements for courses, including teachers of courses, that allow the courses to satisfy multiple credit requirements for a high school diploma, including mathematics. The State Board of Education has discretion over the rulemaking process; rules and processes for the updated requirements should be in place by June 2024.

The Oregon Department of Education (ODE) facilitated a robust rulemaking process given the large scope of the proposed rule revisions. The rulemaking process began by convening an interagency workgroup that included staff from ODE, the Teachers Standards and Practices Commission (TSPC), and

the Higher Education Coordinating Commission. The workgroup identified six currently existing OARs as requiring revision to incorporate requirements established by SB 3.

- Definitions OAR 581-022-0102
- Diploma Requirements OAR 581-022-2000
- Modified Diploma OAR 581-022-2010
- District Curriculum OAR 581-022-2030
- Career Education OAR 581-022-2055
- Atypical Assignments OAR 584-210-0170

Five of the OARs are within ODE and the Board's authority; the remaining rule revision will be coordinated by TSPC. Additionally, a new OAR in Division 21 must be created to outline expectations for the new courses, such as who can teach the course and how credits are awarded, as well as waiver requirements.

Public engagement sessions were held February 21, 23, 26, and 27th. The 163 participants included high school teachers, administrators, school counselors, content experts, ESD staff, higher education personnel, business and industry partners, and parents from across Oregon. Additionally, the Rules Advisory Committee (RAC) was consulted in March and April to assist with the refinement of proposed rule language. Engagement has highlighted the importance of flexibility during the implementation of the new diploma requirements so districts may determine how the courses are implemented locally based on need and structures they already have in place. Additionally, it creates the same requirements for both content areas which will reduce confusion and mitigate the risk of inequitable outcomes.

In response to feedback received, ODE will bring forth two versions of the proposed new OAR to the State Board of Education. The versions are summarized as follows:

- Option A: Allows Higher Education & Career Path Skills and Personal Financial Education standards to be integrated into other content area courses and vice versa.
- Option B: Allows two-way integration for the Higher Education & Career Path Skills, but requires that Personal Financial Education standards are taught in a stand alone course. Other content area standards may be integrated into a Personal Financial Education course, but Personal Financial Education Standards could not be integrated into a different content area course.

ODE recommends that the Board adopt Option A allowing for flexibility to meet local district needs while still ensuring that the standards for both courses are thoroughly addressed in order to earn the credits.

**SUMMARY OF PREVIOUS BOARD ACTION**

This item has not been previously before the Board.

**HAS THE RULE CHANGED SINCE LAST BOARD MEETING?**

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

# Oregon State Board of Education
# April 18th, 2023

AGENDA ITEM: Senate Bill 3 Rulemaking; New OAR, OAR 581-022-0102, OAR 581-022-2000, OAR 581-022-2010, OAR 581-022-2030, OAR 581-022-2055

**POLICY ISSUE OR CONCERNS**

**Stakeholders/Partners:**
Members of the Personal Financial Education and Higher Education Career Pathway Skills standards panels had many conversations regarding the need to support districts with implementation of the bill through rules. These rules have the potential to clarify requirements and establish guidance that districts need to successfully implement SB 3, ensuring that students from historically underserved groups are positively impacted.

**Positive Effects:**
These rule changes have the potential to support districts with implementation of the SB 3 new diploma credit requirements that can positively impact underserved and underrepresented students and their families who for generations have faced financial education and wealth gaps, and access and opportunity barriers to higher education and careers.

**Negative Effects/Barriers:**
The barriers to implementing the requirements of Senate Bill 3 are related to the fast timeline for implementation, as well as lack of funding and district resources. Senate Bill 3 did not provide district funding for additional staffing or professional learning. For this reason, many districts have concerns about staffing and course forecasting for current 9th graders. These barriers were taken into consideration during the rulemaking process.

Another key consideration is that Personal Financial Education standards are already embedded within the adopted Social Science standards for K-12 which are currently required to be taught. In addition to social sciences instruction, there are some districts and ESDs across Oregon that have been offering supplemental personal finance instruction through CTE Business Finance courses, Financial Algebra courses, or other electives. These districts and ESDs have spent money, resources, FTE, and time on instructional materials for the aforementioned courses. Districts that have previously offered this instruction within an existing course may need to plan for stand-alone course options. This process may be more efficient for districts who have not invested time and resources in Personal Financial Education course options as this process may feel duplicative of prior efforts for those who already offer the courses. However, there is much all districts can learn from those with a longer history of teaching the standards. ODE is committed to supporting all districts in this transition through the development of new state standards, professional learning opportunities, and sharing instructional material resources. Overall, the shift to a required 0.5 credit provides a consistent expectation for all Oregon high school students.

**Mitigation:**
ODE recommends supporting the implementation of these new requirements by:

- Recommending flexibility in draft rule language that allows districts to:
    - determine course and credit options that meet local needs
    - identify licensed school personnel who can teach the course or hire if needed

    - implement the new diploma requirements on the timeline given in the bill
    - apply for a one-year waiver option if needed as outlined in the bill
- Identify, and create where needed, supplemental instructional materials to support the standards through openly licensed, free resources
- Create opportunities for districts to network and share promising practices during implementation
- Provide guidance that supports cultural humility and culturally responsive pedagogy.

**EQUITY IMPACT ANALYSIS**

The passing of Senate Bill 3 highlights the impact that knowledge and skill-building for future planning and personal finance can have on the success of future generations. Historically, this information has been provided to some students through elective courses which are not offered by all districts. This has led to reported disproportionalities for underserved student groups in postsecondary access and completion, as well as inequalities within workforce systems. The requirements established by SB 3 provide students with access to the key concepts needed for navigating systems that have previously benefited some over others.

SB 3 creates a requirement that applies to all students graduating in the state of Oregon and takes the approach of helping students understand and navigate systems that have privileged white and middle class families for generations. The process of implementing SB 3 includes the creation of content standards related to future planning. Together, the rules and standards provide a baseline for instruction that all students in Oregon are required to receive. Previously, only the schools that had the funding to prioritize offering these courses as electives were providing the full scope of personal financial education to their students. Many other schools have limited personal financial education to the Social Science standards which are not as comprehensive as a full course. Senate Bill 3 and the proposed rule revisions provide more equitable access to knowledge that may have not been available across generations for historically and currently underserved students by establishing requirements regarding Higher Education and Career Path Skills and Personal Financial Education.

**FISCAL ANALYSIS**

School districts may be fiscally impacted as they:

- may need to secure additional staffing to meet the new requirements.
- may need to procure materials to teach the course.
- may need to provide educators with professional learning.

Other stakeholders that may benefit fiscally from the new requirements include publishers of instructional materials and providers of professional learning which may include financial institutions.

**EFFECT OF A “YES” OR “NO” VOTE**

# Oregon State Board of Education
# April 18th, 2023

AGENDA ITEM: Senate Bill 3 Rulemaking; New OAR, OAR 581-022-0102, OAR 581-022-2000, OAR 581-022-2010, OAR 581-022-2030, OAR 581-022-2055

A "YES" vote will result in the adoption of revisions to OAR 581-022-0102, OAR 581-022-2000, OAR 581-022-2010, OAR 581-022-2030, OAR 581-022-2055 and the adoption of a new OAR in Division 21 to support the implementation of updates to ORS 329.45 outlined in Senate Bill 3.

A "NO" vote will reject revisions to OAR 581-022-0102, OAR 581-022-2000, OAR 581-022-2010, OAR 581-022-2030, OAR 581-022-2055 and the creation of a new OAR in Division 21 to support the implementation of updates to ORS 329.45 outlined in Senate Bill 3.

**STAFF RECOMMENDATION**

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

**ATTACHMENTS**

Attachment 1: Proposed Language for New OAR in Division 21
Attachment 2: OAR 581-022-0102 Tracked Changes
Attachment 3: OAR 581-022-2000 Tracked Changes
Attachment 4: OAR 581-022-2010 Tracked Changes
Attachment 5: OAR 581-022-2030 Tracked Changes
Attachment 6: OAR 581-022-2055 Tracked Changes

**581-022-0102**
**Definitions**

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

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

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

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

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

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

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

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

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

(a) Workplace mentoring;

(b) Workplace simulations;

(c) School-based enterprises;

(d) Structured work experiences;

(e) Cooperative work and study programs;

(f) On-the-job training;

(g) Apprenticeship programs;

(h) Service learning; and

(i) Field-based investigations.

(6) “Charter school”: A public charter school as defined in ORS 338.005.

(7) “Child development specialist program”: An optional elementary component of a district’s comprehensive school counseling program for grades K-8 (or any configuration thereof).

(8) "Collection of Evidence": The work of a student collected and evaluated together to measure the student’s ability to apply what the student knows and can do in relation to a set of standards or criteria.

(9) "Common Curriculum Goals": The knowledge and skills expected of all students as a result of their educational experience; defined by the state as:

(a) The Essential Learning Skills which means essential skills as defined by this rule; and

(b) The Content Standards ~~Common Knowledge and Skills in instructional programs~~ as adopted by the State Board of Education.

(10) "~~Common Knowledge and Skills in Instructional Programs~~Content Standards": Facts, concepts, principles, rules, procedures and methods of inquiry associated with specific subject matter areas as adopted by the State Board of Education.

(11) "Common School District": A school district other than a union high school district formed primarily to provide education in all or part of grades K through 12 to pupils residing within the district (ORS 330.005(2)(b)). See section (20) of this rule.

(12) "Community Partnerships": Collaborations to network resources to assist students to meet state and local standards and prepare students for post high school transitions. These partnerships include parents, students, business, education, government and community-based organizations.

(13) "Compliance Indicator": Statement of the action taken by a local district which can be accepted as evidence that the district is in compliance with the intent of a particular state standard.

(14) “Comprehensive school counseling program": A program that is integral to a district's total PreK through 12 educational program that is planned, proactive and preventative in design to address each student's academic, career, social/emotional development and community involvement.

(15) "Conditionally Standard School": A school that fails to meet the standards but has submitted a plan of correction, approved by the district school board, to the State Superintendent.

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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

(b) Instructional time shall include:

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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

[Publications: Publications referenced are available from the agency.]

**Statutory/Other Authority:** ORS 326.051
**Statutes/Other Implemented:** ORS 326.011
**History:**
ODE 15-2022, amend filed 03/24/2022, effective 03/24/2022
ODE 38-2018, minor correction filed 11/21/2018, effective 11/21/2018
ODE 18-2018, amend filed 06/05/2018, effective 06/06/2018
ODE 21-2015, f. & cert. ef. 12-18-15
ODE 4-2015, f. 1-30-15, cert. ef. 7-1-15
ODE 25-2008, f. & cert. ef. 9-26-08
ODE 4-2003, f. & cert. ef. 3-14-03
ODE 12-2002, f. & cert. ef. 4-15-02
ODE 7-1999, f. & cert. ef. 1-15-99
EB 6-1995, f. & cert. ef. 1-24-95
EB 8-1989, f. & cert. ef. 1-27-89

1EB 4-1986, f. 1-23-86, ef. 2-1-86
1EB 19-1980, f. 6-17-80, ef. 7-1-80



OREGON DEPARTMENT OF EDUCATION

# Oregon's Newest Diploma Requirements

## Senate Bill 3

## Overview

Beginning with the class of 2027, the Oregon diploma requirements will include a 0.5 credit in Personal Financial Education and a 0.5 credit in Higher Education and Career Path Skills, as part of the 24 credit requirements. This requires the development of new standards designed to support students in developing skills they will need to be successful in their future lives.

## Background

One of the recommendations from Senate Bill 744 (2021) included adding a requirement for a future and financial planning course, providing a foundation for the development of Senate Bill 3 in the 2023 session. Senate Bill 3, requiring a 0.5 credit in Personal Financial Education and a 0.5 credit in Higher Education and Career Path Skills, received broad support from educators, parents, students, and business and community partners.

In June 2023, the Oregon Legislature passed, and Governor Kotek signed Senate Bill 3. Together, this new legislation and the Senate Bill 744 community-informed recommendations for graduation requirements provide momentum to help create more equitable, inclusive, and accessible diploma requirements.

## Purpose of the New Requirements

The purpose of Oregon's newest diploma requirements are to:

- Provide students opportunities to acquire a variety of real-world skills,
- Enable students to focus on the practical application of financial literacy to future aspirations,
- Establish dedicated time for all students to receive support in developing interview skills and resumes, applying for financial aid, and completing employment and/or college applications, and
- Promote students' successful transition to career, college, and adult life.



# Credit Requirements

Senate Bill 3 provides definitions that describe the type of knowledge, skills, and experiences that students will gain in their high school coursework.

## Personal Financial Education Credit Requirement

As established in Senate Bill 3, Personal Financial Education means instruction that provides guidance on:

- Credit scores, including how to build credit, the costs and benefits of borrowing money on credit and the long-term impacts of high or low credit scores;
- Investments, asset building and debt, including how to open a bank account, different types of bank accounts, compound interest, the total cost of loan repayment, comparing investment options and types of investments and understanding different types of retirement accounts;
- Strategies for creating a budget, tracking and modifying spending patterns and understanding insurance products, including exploring common costs associated with rentals and home ownership;
- Taxes, including accessing tax credits, understanding tax cycles, being familiar with state and federal tax forms and being familiar with federal, state, regional and local taxes; and
- Building financial well-being, including evaluating the impact of behavioral economics and the psychology of money, explaining trends in financial health and evaluating consumer skills, including fraud and identity theft prevention.

## Higher Education and Career Path Skills Credit Requirement

As established in Senate Bill 3, Higher Education and Career Path Skills means providing instruction on:

- Applying for jobs, including preparing a resume or filling out a job application and developing job interview skills;
- Applying for admission to a post-secondary institution of education, including applying for financial aid and scholarships;
- Applying for post-secondary learning and job training opportunities and programs that do not require a four-year degree, including apprenticeships and how to meet the prerequisites for those opportunities and programs;
- Developing career-related skills, including improving employability skills, taking advantage of community-based experiential learning and gaining knowledge of career opportunities; and
- Seeking assistance, including accessing community resources and acting as a self-advocate for mental, physical and financial well-being.





# Timeline

Implementation of these new diploma requirements will first require the adoption of new Oregon Administrative Rules and instructional standards by the State Board of Education. These new rules and standards will support schools in providing students with opportunities to complete a 0.5 credit of higher education and career path skills and a 0.5 credit of personal financial education in grades 9-12, starting with the class of 2027.

The Oregon Department of Education recommends to start planning, communicating and implementing the new diploma requirement as early as possible. The Department has established the following anticipated implementation timeline:

**2023-2024:**

- ODE convenes content panels to develop standards and engages with partners for feedback on draft standards.
- ODE and TSPC engages in rule-making to determine licensure requirements.

**2024-2025**:

- ODE develops resources to support implementation, including instructional materials evaluation tools.

**2025-2026**

- Most districts and public charter schools implement new course requirements.

**2026-2027:**

- Students are required to have completed a 0.5 credit in Personal Financial Education and a 0.5 credit in Higher Education and Career Path Skills as part of earning an Oregon Diploma.
    - *Waivers available if a district or school is able to demonstrate to the satisfaction of the Oregon Department of Education, based on rules adopted by the State Board of Education, that the district or school is unable to provide courses necessary for students to satisfy the credit requirements and due to a lack of educators qualified to provide the courses. If approved, this is a one-year waiver.*

**2027-2028:**

- Students are required to have completed a 0.5 credit in Personal Financial Education and a 0.5 credit in Higher Education and Career Path Skills to earn an Oregon Diploma.
    - *Waivers are not available.*

# Waiver

Senate Bill 3 amends the requirements outlined in ORS 329.451 to apply to high school diplomas awarded on or after January 1, 2027. It also allows a school district, public charter school, or education service district to request a one-year waiver if needed. Districts or schools can apply for a waiver if they are unable to provide courses necessary for students to satisfy the credit requirements and due to a lack of educators qualified to provide the courses. If approved, the waiver is for one year only.

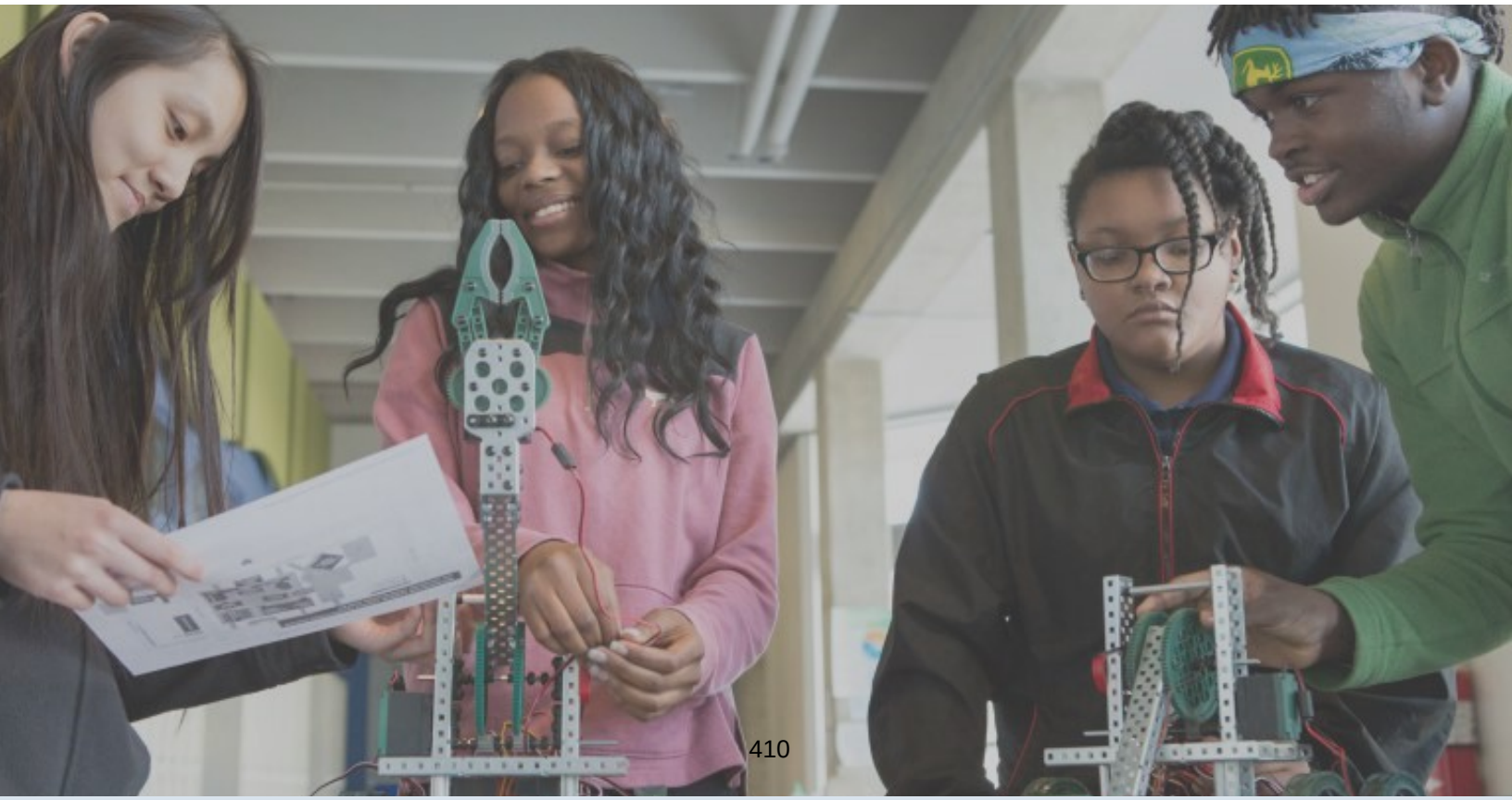
*To obtain a waiver, districts must:*

- Request a waiver for students who will be awarded high school diplomas on or after January 1, 2027, and before January 1, 2028, and
- Ensure that students who will be awarded high school diplomas on or after January 1, 2028, can satisfy the credit requirements of ORS 329.451.

# Development Approach

The Oregon Department of Education will develop and support the content standards for these new required courses using a multi-step approach, including:

- Convening content standards panels for Personal Financial Education and Higher Education and Career Path Skills,
- Conducting ongoing engagement to learn from and incorporate input and feedback,
- Convening an instructional materials review panel to develop criteria and a rubric for identifying high-quality curriculum and resources, and
- Developing resources to support districts, public charter schools and education service districts with implementation.





# New Diploma Requirements: FAQs

**Q: When will this change in requirements take effect?**
A: Students must earn a 0.5 credit in personal financial literacy and a 0.5 higher education and career path skills to be awarded a standard Oregon diploma on or after January 1, 2027**.**

**Q: Does this increase the diploma credit requirement from 24 to 25 credits?**
A: No. The total credit requirements remain at 24 credits for the class of 2027 and beyond. Refer to the Credit Requirements table on the Oregon Diploma webpage for specific requirements.

**Q: Are there any new requirements for extended and modified diplomas?**
A: No. Senate Bill 3 only applies to the standard 24 credit Oregon diploma.

**Q: What if a district is not ready to implement for the 2026-2027 school year?**
A: Senate Bill 3 includes a provision for a one-year waiver. Schools who receive a waiver must be ready to offer the required courses and credit by January 1, 2028.

**Q: We are a public charter school, does this apply to us?**
A: Yes, it applies to all public charter schools.

**Q: Who must be notified about the new diploma requirements?**
A: Districts should communicate the new diploma requirements to grade 9 students in 2023/2024, graduating Spring 2027. Also, beginning in grade 5, students who are served by an IEP must have their families notified of diploma requirements.

**Q: When will standards be developed?**
A: The Oregon Department of Education is currently in the planning phase and will publish a timeline for development on the Oregon Diploma webpage once it is ready.

**Q: What instructional materials should we be using to teach the courses?**
A: As part of the implementation process, ODE and an advisory panel will develop criteria to evaluate instructional materials related to personal financial education and higher education and career path skills. This criteria should be available by the 2024-25 school year.



**For questions, contact:** ODE.StateGraduationRequirements@ode.oregon.gov

# Oregon State Board of Education
# April 18, 2024
AGENDA ITEM: 7.C.

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| **SUBJECT:** OAR 581-021-0037: Administration of Medication<br>**STAFF NAME & OFFICE**: Tenneal Wetherall, Chief of Staff, ODE<br>Ely Sanders, School Health Services Specialist, Office of Enhancing Student Opportunities<br><br>OAR 581-021-0037 (Administration of Medication) encompasses district requirements for the administration of prescription and nonprescription medication during school hours/programming. This update reflects new ORS requirements, makes permanent temporary changes made during COVID, and edits (grammatical, formatting, consolidation of requirements) to increase clarity for districts, parents, and other constituents.<br><br>☐ New Rule<br>☒ Amend Existing Rule<br>☐ Repeal Rule | ☒ **First Reading**<br>☒ **Presentation**<br>☐ **No Presentation**<br>☐ **Action**<br>☐ **Temp Rule**<br>☐ **Presentation**<br>☐ **No Presentation** |

**BACKGROUND**

**History**:
OAR 581-021-0037 (Administration of Medication) was first adopted by the state board of education in 1998 per ORS 339.869 (Administration of medication to so students). ORS 339.869 gives the State Board of Education the authority to adopt rules for the administration of prescription and nonprescription medication to students by trained school personnel and for student self-medication. The rules shall include age-appropriate guidelines and training requirements for school personnel.

In 2023, the legislature passed HB 2395 which established, in ORS 339.869, the ability for school districts, education service districts (ESDs), and public charter schools to have policies and procedures to allow staff to administer an opioid antagonist to any individual believed to be experiencing an opioid overdose. In 2024, the legislature passed SB 1552 which updated language in ORS 339.869 to clarify that districts are not required to allow for the administration of an opioid antagonist; however they may have policies and procedures to do so. In addition, SB 1552 requires districts to share certain information related to opioid overdose and opioid antagonists with parents. Collectively, these two bills require updates to OAR 581-021-0037.

This rule update also includes technical fixes that address concerns and feedback received from school districts and other education partners, adds language from statute that prohibits recommending or requiring medication to attend school, and increases clarity and readability.

**Purpose**
ORS 339.869 gives the State Board of Education the authority to adopt rules for the administration of prescription and nonprescription medication to students by trained school personnel and for self-administration of medication by students. OAR 581-021-0037 governs administration of medication to students when the student is in school, at a school-sponsored activity, under the supervision of school personnel, and in transit to or from school or school-sponsored activities. This includes:

- Definitions of terms related to the administration of medication to students.
- Requirement that districts adopt policies and procedures for the administration of prescription and nonprescription medication to students.
- Requirement that districts adopt policies and procedures that allow students to self-administer prescription and nonprescription medication.
- Establishes medication administration training requirements for district personnel.
- Requirements related to medication administration for life-threatening allergic reactions or adrenal crisis.
- Requirements for parent consent prior to the administration of medication to a student.
- Allows for designated personnel to administer naloxone or any similar medication that is designed to rapidly reverse an overdose of an opioid drug by trained school personnel to any student or other individual on school premises who the personnel believe in good faith is experiencing an overdose of an opioid drug.

**Proposed Draft Rule Changes Not Requiring Board Discretion**
OAR 581-021-0037 establishes the requirements related to the administration of prescription medications and nonprescription medications. This draft rule update includes general edits and formatting to improve clarity and readability and adds statute requirements:

- Updates to OAR/ORS citations.
- Alignment of definitions with the Oregon Board of Pharmacy and the Oregon Board of Nursing OARs.
- Removal of section related to severe allergies and adrenal insufficiency that was added to OAR 581-022-2220 per State Board of Education action (June, 2023).
- Adds definition of "delegation" and differentiates delegation from general medication administration.
- Consolidates medication administration training to one section of OAR.
- Adds new language in relation to opioid antagonists per passage of HB 2395 (2023) and SB 1552 (2024)
- Adds requirement for a "process by which the parent or guardian of a student may request in writing that backup prescribed auto injectable epinephrine be kept at a reasonably secure location in a student's classroom if…" (ORS 339.866)
- Adds prohibition that school personnel shall not recommend to a parent or legal guardian of a student that the student seek a prescription for a medication that is prescribed with the intent of affecting or altering the thought processes, mood or behavior of the student. (ORS 339.873)
- Adds prohibition school personnel shall not require a child to obtain a prescription for a substance covered by the Controlled Substances Act, 21 U.S.C. 801 et seq., as a condition of attending school, receiving an evaluation to determine eligibility for early childhood special education or special education under ORS chapter 343 or receiving early childhood special education or special education services. (ORS 339.873)

**Proposed Changes That Allow Board Discretion**

- Online Medication Administration Training. OAR 581-021-0037 requires designated personnel to receive medication administration training annually. The first training for designated personnel and every third training there after must be provided in-person. The State Board of Education, in

response to the COVID pandemic, adopted a temporary allowance to allow some online medication administration training to be considered in-person.

As a result of input from school nurses and other school district personnel, this draft rule update proposes to make this temporary allowance permanent.

- Medication Administration Training Guidelines. ORS 339.869 requires the state board of education to adopt rules for the administration of medication that include "age-appropriate guidelines and training requirements for school personnel." Currently, OAR 581-021-0037, states that "training for designated personnel must be based on requirements set out in guidelines that are approved by the Oregon Department of Education and include a discussion of applicable district policies, procedures and materials." Currently, all school districts must use ODE's medication administration training. ODE does not have a process to approve medication administration training, nor have we historically had state board approved guidelines. The draft rule update establishes guidelines by adding a list of required elements:
  (i) Safe storage, administration, handling, and disposing of medications;
  (ii) Accessibility of the medication during an emergency;
  (iii) Record keeping;
  (iv) Whether response to medication should be monitored by designated personnel and the role of designated personnel in such monitoring;
  (v) Emergency medical response procedures following administration of the medication;
  (vi) Confidentiality of health information; and
  (vii) Assessment of gained knowledge.

  This change will allow districts to develop their own training as long as the training includes the required elements. Districts will continue to be able to use the ODE training, however, districts will have the option to develop their own training to better fit their school setting or programming needs (i.e., administration of medication during a field trip or afterschool activity).

- District Stock Medication Program. Currently, OAR 581-021-0037 requires that all non-prescription medication be provided by parents or guardians in its original manufacture's packaging. This can create a challenge organizing and storing student containers of commonly used nonprescription medication. This is especially challenging in relation to field trips and off campus activities like outdoor school.

  Draft rule update adds the allowance that non-prescription medication may be administered as part of a district stock medication program. A district stock medication program will reduce the burden and cost to parents and guardians of providing non-prescription medication in the original manufacturer's packaging.

- Minor Consent for Medication Administration. Currently, OAR 581-021-0037 references minor consent laws (ORS 109.610, 109.675 and 109.640) in relationship to a minor's ability to consent to medication administration. This has resulted in confusion for school districts as it relates to when a minor can consent to medication administration versus when parent consent is needed.

In addition to causing confusion, this may create a false sense of privacy for the student in relation to parents' access to information about the use of medication. School records about the use of medication would fall under the Family Education Rights and Privacy Act (FERPA). Per FERPA, parents may request access to student education records, including medication administration records.

School districts do not provide the medical services nor employ the providers providing the services listed in the statutes. Draft rule update removes language that references the ability for minors to consent to medication administration.

**Stakeholder voice/input (individual and collective i.e., groups)**
There has been significant stakeholder voice and input on this rule. Since 2022 ODE has collaborated closely with the ODE School Nurse Advisory group and the Oregon Health Authority (OHA), the Oregon Board of Pharmacy, and the Oregon Board of Nursing to draft the proposed amendment to OAR 581-021-0037. The engagement process included initial engagement sessions during the winter of 2024 of over 200 participants from the following groups:

- Multiple engagement sessions with ODE's School Nurse Advisory Group.
- Virtual engagement session with the Oregon School Nurses Association. (10/23)
- 2 Virtual engagement sessions for school district, ESD, and charter school staff (4/24)
- 2 Virtual engagement sessions for education partners with representatives from the Central Oregon Disability Support Network, and the State Advisory Council for Special Education.
- Meetings, rule review, and comment with Oregon School Board Association (OSBA), Oregon Coalition of School Administrations (COSA), and the Oregon School Employees Association (OSEA).
- Oregon Health and Sciences University's Family to Family Information Center (4/24)
- Department of Justice rule draft review (4/24)
- ODE Office of American Indian/Alaska Native Education (10/23)

Participants provided feedback on the draft rule through questions and discussion during engagement sessions. In addition, participants were provided access to the draft rule update to provide written comment. ODE staff received consultation from the department of justice specific to removal of reference to minor consent statutes. Most recently, ODE staff presented the draft rule to ODE's Rule Advisory Committee (RAC) on April 4, 2024, and received feedback from participants. ODE has reviewed all feedback and has made changes to the draft rule update accordingly.

**SUMMARY OF PREVIOUS BOARD ACTION**

OAR 581-021-0037 (Administration of Medication) was first adopted by the state board of education in 1998 per ORS 339.869 (Administration of medication to students). Since 1998, the State Board of Education has amended OAR 581-021-0037 11 times. Updates have primarily been in response to new statue requirements related to administration of specific types of medication. Most recent board actions include:

- 4/23/2020. State Board of Education adopted OAR amendment in response to Senate Bill 665 (2019). SB 665 directed the State Board to adopt rules for the administration of naloxone or any similar medication that is in any form available for safe administration and that is designed to rapidly reverse an overdose of an opioid drug by trained school personnel to any student or

other individual on school premises who the personnel believe in good faith is experiencing an overdose of an opioid drug.

- 11/24/2020. State Board of Education adopted rule amendment that allowed online medication administration training to qualify as "in-person" training for the 2020-2021 school year.

**HAS THE RULE CHANGED SINCE LAST BOARD MEETING?**

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

**POLICY ISSUE OR CONCERNS**

ODE received feedback and questions throughout the engagement process. The below chart summarizes key policy issues or concerns ODE received from the field, ODE's Rules Advisory Committee, and partners regarding OAR 581-021-0037.

| **Feedback Received DRAFT Rule Revision 581-021-0037** | |
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| ***Policy Issue or Concern Raised*** | ***Action on Feedback Received*** |
| **Definitions:**<br>1. Add definition of "delegation" to differentiate medication administration done as part of nurse delegation.<br>2. Add definition of "district" to clarify that the OAR requirements pertain to school districts, ESDs, and public charter schools. | **Addressed in Rule**<br>• Adjusted draft rule to include definitions of both 'delegation" and "district" consistent with input received.<br>• Added language in Section 2 of OAR 581-021-0037 that clarifies that medication may be administered as part of a nurse delegation: *Medications, including injectable medications may be administered by district personnel as part of a formal delegation by a Registered Nurse.* |

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| **Staff supports**<br>• Feedback from engagement session included the desire to add clarity that school district must "ensure district staff are trained, willing, capable, appropriately supervised and have access to a school nurse." | **Addressed in Rule and Guidance**<br>• Adjusted draft to include the following language: *Ensure designated staff have received medication administration training and have access to a school nurse as per OAR 581-022-2220*<br>• The terms "willing," "capable," and "appropriately supervised" are subjective or intersect with employee and employer relations. It was determined that reference to the willingness and capability of staff may be better placed in future guidance. |
| **District Stock Medication**<br>• Initial feedback noted that districts wanted the option to have stock medication programs and that the requirement for all medication to be provided by parents to the district in the original manufacture's original packaging was a burden to districts and families.<br>• Additional feedback noted the importance of future guidance related to implementation of district stock medication programs | **Addressed in Rule and Guidance**<br>• Added language to section 3(d)(B) that allows nonprescription medication that is part of a district's stock medication program in compliance with the Oregon Board of Pharmacy rules including OAR 855-035-0005.<br>• ODE plans to partner with the Oregon Health Authority Oregon, the Oregon Board of Pharmacy, and the Oregon School Nurses Association to draft guidance to support district implementation of stock medication programs. |
| **Minor Consent to Medication Administration**<br>• Initial feedback included concerns that OAR 581-021-0037 referenced minor consent statutes that were not applicable to medication administration in a school setting.<br>• Feedback on the draft rule noted concerns related to the removal of referenced statutes and the ability for minors to consent to medication administration.<br>• Additional feedback included safety concerns related to implying that minor students can consent to medication administration while the Family Education Rights Privacy Act (FERPA) allows parents | **Addressed in Rule**<br>• Removed reference to minor consent in draft rule. |

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| and guardians access to student education records. | |

**EQUITY IMPACT ANALYSIS**

ODE seeks to proactively navigate equity initiatives that interrupt and eliminate harmful power dynamics that are endemic in Oregon's education system. Our mission is to create an equitable education system centered in justice, relationships, and healing to ensure that every student can achieve their highest potential. Many students rely on medications to manage chronic conditions such as asthma, diabetes, allergies, and others. Proper medication administration in schools ensures that students have access to the medications they need to stay healthy and focused on their education. This is particularly important for students from racial and ethnic minority backgrounds who may face barriers to accessing healthcare outside of school due to factors such as lack of insurance, transportation issues, or language barriers. OAR 581-021-0037 ensures safe administration of medication to students. Most specifically the draft rule update positively impacts equity by allowing districts to implement stock medication programs. If a district has a stock medication program, parents will not be required to provide individual student medications. This will increase access for students and reduce financial burden on families.

**FISCAL ANALYSIS**

- No state agencies, local governments, and/or members of the public are likely to be economically affected by the rule change
- There is no anticipated cost related to compliance for districts, education partners, families, or small businesses

**EFFECT OF A "YES" OR "NO" VOTE**

If the Board approves these recommendations, OAR 581-021-0037 will be in alignment with statute and ODE will develop guidance to the field regarding implementation of the updated OAR.

If the Board rejects the recommendations, then the Department will craft a revised version of the rules for future Board consideration. OAR 581-021-0037 will remain in effect without updates that reflect statute requirements. ODE will be limited in its ability to provide guidance related the administration of opioid antagonists.

**STAFF RECOMMENDATION**

☐ Approve ☒ Approve next month ☐ No recommendation at this time

# Oregon State Board of Education
# April 18, 2024
AGENDA ITEM: 7.C.

***Prompted by:*** ☐ State law changes ☐ Federal law changes ☐ other

**ATTACHMENTS**

Attachment 1: Draft OAR 581-021-0037: Administration of Medication to Students

**4/11/2024**

# Medication Administration OAR Update

OAR 581-022-2220

**Related Statutes:**

- ORS 339.866 Self-Administration of Medication by Students
- ORS 339.867 "Medication" defined for ORS 339.869 and 339.870
- ORS 339.869 Administration of Medication to students
- ORS 339.870 Liability of School Personnel
- ORS 339.871 Liability of School Personnel Self Administration
- ORS 339.874 Application of Sunscreen
- ORS 339.873 Recommendations on Medication to affect thought process, mood or behavior prohibited

**Summary of updates**:

- Re-organization of OAR to increase clarity.
- Updated and added OAR/ORS citations.
- Made permanent the temporary allowance in current OAR for some virtual medication administration training.
- Added new language in relation to opioid antagonists per passage of HB 2395 (2023)
- Removed section related to severe allergies and adrenal insufficiency that was added to OAR 581-022-2220 (July 2023).
- Added ability for district to have stock medications in alignment with Board of Pharmacy OARs.
- Aligned definitions with Board of Pharmacy OARs.
- Added definition of "delegation" and separated out a delegation from general medication administration.
- Shifted from an ODE medication administration training being required to requiring trainings that meet listed components.
- Consolidated medication administration training to one section of OAR.
- Removed language that implied students can consent without parent permission. This was done after consultation with DOJ.
- Added ORS requirement for a "process by which the parent or guardian of a student may request in writing that backup prescribed auto injectable epinephrine be kept at a reasonably secure location in a student's classroom if…"
- Added prohibition that school personnel shall not recommend to a parent or legal guardian of a student that the student seek a prescription for a medication that is prescribed with the intent of affecting or altering the thought processes, mood or behavior of the student. (ORS 339.873)

## OAR 581-21-0037 Draft update (03/26/24)

**581-021-0037**
**Administration of Medication**

(1) As used in this rule, definitions of terms shall be as follows:

(a) “Adrenal crisis” means adrenal crisis as defined in ORS 433.800.

(b) “Adrenal insufficiency” means adrenal insufficiency as defined in ORS 433.800.

(c) "Asthma," ~~means a chronic inflammatory disorder of the airways that requires ongoing medical intervention~~asthma as defined in ORS 339.866,

(d) “Delegation” means a formal delegation of a nursing procedure by a registered nurse to district personnel in accordance with the Oregon Nurse Practice Act (OAR Chapter 851)

(e~~d~~) "Designated personnel" means the school personnel designated and trained to administer medication pursuant to district policy and procedure.

(f) “District” means public school district, education service district, or charter school.

(g) “Drug” means drug as defined in ORS 689.005.

(e~~h~~) “Medication” means ~~:~~medication as defined in ORS 339.867.

~~(A) Any drug, chemical compound, suspension or preparation in suitable form for use as a curative or remedial substance taken either internally or externally but not injected;~~

~~(B) Premeasured doses of epinephrine;~~

~~(C) Medication to treat adrenal insufficiency;~~

~~(D) Glucagon to treat severe hypoglycemia; and~~

~~(E) naloxone or any similar medication that is designed to rapidly reverse an overdose of an opioid drug.~~

~~(f) "Nonprescription medication" means medication that under federal law does not require a prescription from a prescriber.~~

(i) “Nonprescription medication” means nonprescription drugs as defined in ORS 689.005.

(j~~g~~) “Notice of a diagnosis of adrenal insufficiency” means written notice to the ~~school~~ district from ~~student or~~ the parent or guardian of a student who has been diagnosed as adrenal insufficient with a copy of an order from the student’s primary care provider that includes the student’s diagnosis, description of symptoms indicating the student is in crisis, prescription for medication to treat adrenal insufficiency crisis, and instructions for follow-up care after medication to treat adrenal insufficiency crisis has been administered.

~~(h) "Prescriber" means:~~

~~(A) A doctor of medicine or osteopathy or a physician assistant licensed to practice by the Board of Medical Examiners for the State of Oregon except as allowed under subsection (5) of this rule;~~

~~(B) An Oregon-licensed advance practice registered nurse with prescriptive authority;~~

~~(C) A dentist licensed by the Board of Dentistry for the State of Oregon;~~

~~(D) An optometrist licensed by the Board of Optometry for the State of Oregon;~~

~~(E) A naturopathic physician licensed by the Board of Naturopathy for the State of Oregon; or~~

~~(F) A pharmacist licensed by the Board of Pharmacy for the State of Oregon.~~

(j) “Prescriber” means a “Practitioner” as defined in ORS 689.005.

~~(i) "Prescription medication" means any medication that under federal law requires a prescription by a prescriber.~~

(k) “Prescription medication” means a “Prescription Drug” as defined in ORS 689.005

(l~~j~~) "Severe allergy" means ~~a life-threatening hypersensitivity~~ severe allergy~~to a specific substance such as food, pollen, dust, or insect sting~~ as defined in ORS 339.866.

.(m) “Short-acting opioid antagonist” means short-acting opioid antagonist as defined by ORS 689.800.

(2)~~(a)~~ ~~School d~~Districts shall adopt policies and procedures that provide for:

(a~~A~~) The administration of medication to students by designated personnel;

(b) Medications, including injectable medications may be administered by district personnel as part of a formal delegation by a Registered Nurse.

(c~~B~~) The administration of medication by a student to ~~themself~~themselves ~~without assistance from designated personnel.; and~~

~~(b) School districts may adopt policies and procedures that provide for the administration of naloxone or any similar medication that is designed to rapidly reverse an overdose of an opioid drug by trained school personnel to any student or other individual on school premises who the personnel believe in good faith is experiencing an overdose of an opioid drug.~~

(3) Policies or~~and~~ procedures for the administration of medication to students by designated personnel shall:

(a) Include a process to designate and supervise appropriate ~~school~~district personnel that takes into account when a student is in school, at a ~~school~~district-sponsored activity, under the supervision of ~~school~~district personnel, ~~and~~or in transit to or from school or ~~school~~district-sponsored activities;

(b) Ensure designated staff have received medication administration training and have access to a school nurse as per OAR 581-022-2220;

(~~b~~c) Require designated personnel to successfully complete annual training on the administration of medication in accordance with the following requirements:

(A) Training for designated personnel must be provided by a person who is familiar with the delivery of health services in a school setting and who is:

(i) A Registered Nurse licensed by the Oregon State Board of Nursing; or

(ii) A prescriber.

~~(ii) A doctor of medicine or osteopathy or a physician assistant licensed to practice by the Board of Medical Examiners for the State of Oregon; or~~

~~(iii) A pharmacist licensed by the Board of Pharmacy for the State of Oregon.~~

(B) District shall use training developed by the Oregon Health Authority (OHA) for district personnel to administer epinephrine, ~~G~~glucagon, and medication to treat adrenal insufficiency as required in 433.810, 433.815, and 433.830;

(C~~B~~) ~~The t~~Training for designated personnel ~~must~~ to administer medications to students must align with the ODE Medication Administration Training and at a minimum include a discussion of applicable district policy, procedures and materials, and include the following elements: ~~be based on requirements set out in guidelines that are approved by the Oregon Department of Education and include a discussion of applicable district policies, procedures and materials;~~

(i) Safe storage, administration, handling, and disposing of medications;

(ii) Accessibility of the medication during an emergency;

(iii) Record keeping;

(iv) Whether response to medication should be monitored by designated personnel and the role of designated personnel in such monitoring;

(v) Emergency medical response procedures following administration of the medication;

(vi) Confidentiality of health information,; and

(vii) Assessment of gained knowledge.

(DC) The first training for a designated district personnel and every third training thereafter must be provided in-person. During the interveningsubsequent years, designated district personnel may complete an online training that has been approved by the Oregon Department of Education so long as a trainer is available within a reasonable time following the training to answer questions and provide clarification. For the 2020-2021 school year,

(E) An online training may to qualify as "in-person" a distance training format may only be considered when these measures arecan be met:

(i) Content is provided via synchronous, interactive online sessions with the trainer and learners visible on screen;.

(i) Emergency medication training that requires skill demonstrations must follow OHA rules and updated guidance. It is recommended that medication training that requires skill demonstrations be provided via same-room in-person format with appropriate disease prevention measures in place.

(ii) Trainers must be licensed and work within their scope of practice;. andIt is recommended that trainers who have never conducted medication administration training before conduct the training via same-room in-person format first, or reach out to experienced trainers to co-facilitate via distance format.

(iii) Include in-person, skills demonstration for training developed by the Oregon Health Authority for epinephrine, glucagon, and for medication to treat adrenal insufficiency.

(iii) Content is provided at a distance via synchronous, interactive online sessions with the trainer and learners visible on screen.

(I) It is recommended to limit the number of learners so that sessions can be as interactive as possible.

(II) It is recommended that a second person co-facilitate online sessions to support engagement of all participants.

(F) District shall maintain documentation of district personnel's completion of training as required by OAR 166-400-0010.; and

(G) In alignment with district board policy, any district personnel may be allowed to administer short-acting opioid antagonist to any student or other individual on district premises who the personnel believe in good faith is experiencing an overdose of an opioid drug without receiving medication administration training..

(dc) Permit designated personnel to administer prescription medication where:

(A) Because of its prescribed frequency or schedule, the medication must be given while in school, at a ~~school~~district-sponsored activity, while under the supervision of school personnel, ~~and~~or in transit to or from school or ~~school~~district-sponsored activities;

(B) The student's parent or guardian has provided written permission~~. or the student is allowed to seek medical care without parental consent pursuant to ORS 109.610, 109.675 and 109.640; and~~

~~(i~~C~~)~~ ~~The student or the student's parent or guardian has provided the school~~ to the district with written instruction for the administration of the medication from the prescriber that includes the name of the student, name of the medication, dosage, method of administration, frequency of administration, any other special instructions, and the signature of the prescriber. A prescription medication label prepared by a pharmacist at the direction of a prescriber shall be sufficient if all of the information required by this definition except for the prescriber's signature is included.

(~~d~~e) Permit designated personnel to administer nonprescription medication where:

(A) The nonprescription medication is necessary for the student to remain in school;

(B) The nonprescription medication is:

(i) Provided in the original manufacturer's container by the student's parent or guardian; or~~of the student~~

(ii) Is part of a district's stock medication program in compliance with the Oregon Board of Pharmacy rules including OAR 855-035-0005.~~;~~

(C) ~~The student or t~~The student's parent or guardian has provided written instruction for the administration of the nonprescription medication that includes the name of the student, name of the medication, dosage, method of administration, frequency of administration, any other special instructions, and signature of the student's parent or guardian. If the written instruction is not consistent with the manufacturer's guidelines for the nonprescription medication, the written instruction must also include a written order allowing the inconsistent administration signed by a prescriber; and

(D) For nonprescription medication that is not approved by the Federal Drug Administration, a written order from the student's prescriber that includes the name of the student, name of the medication, dosage, method of administration, frequency of administration, a statement that the medication must be administered while the student is in school, any other special instructions, and the signature of the prescriber.

(f~~e~~) Include procedures for the administration of premeasured doses of epinephrine by ~~school~~trained district personnel to any student or other individual on ~~school~~district premises who the personnel believe in good faith is experiencing a severe allergic ~~reaction~~response,

regardless of whether the student or individual has a prescription for epinephrine as provided by ORS 433.815;

(gf) Include procedures for the administration of medication by districtschool personnel to treat a student who the personnel believe in good faith is experiencing symptoms of adrenal crisis. The procedures must provide that:

(A) Per ORS 339.869, oOnly upon notice of a diagnosis of adrenal insufficiency as defined in this rule, the building administrator of the school the student attends will designate one or more schooldistrict personnel to be responsible for administering medication to treat adrenal insufficiency in the event the student exhibits symptoms that schooldistrict personnel believe in good faith indicate the student is experiencing symptoms of adrenal crisis;

(B) The designated personnel will successfully complete training to administer medication to treat a student who has adrenal insufficiency and is experiencing symptoms of adrenal crisis in accordance with rules adopted by the Oregon Health Authority;

(C) The student's student or parent or guardian of the student must provide adequate supply of the student's prescribed medication to the school district; and

(D) In the event that a student experiences symptoms of adrenal crisis and the designated personnel determines the medication to treat adrenal insufficiency should be administered, any available districtschool personnel will immediately call 911 and the student's parent or guardian.

~~(A) Standards for the education and training of school personnel to manage students with life threatening allergies or adrenal insufficiency;~~

~~(B) Procedures for responding to life-threatening allergic reactions or adrenal crisis;~~

~~(C) A process for the development of an individualized health care and allergy plan for every student with a known life-threatening allergy and an individualized health care plan for every student for whom the school district has been given proper notice of a diagnosis of adrenal insufficiency as defined in this rule;~~

~~(D) Protocols for preventing exposures to allergens;~~

~~(E) A process for determining if or when a student may self-carry prescription medication when the student has not been approved to self-administer medication;~~

(h) Address the following for the administration of medications including medications that are self-administered by students:

(A) Safe storage, accessibility of medications during an emergency, methods for administration, handling, and disposing of medications;

(B) Record keeping;

(C) Whether student response to medication should be monitored by designated personnel and the role of designated personnel in such monitoring;

(D) Emergency medical response for life threatening side effects and allergic reactions, including the administration of premeasured doses of epinephrine;

(E) Initiating emergency medical response when epinephrine or a short-acting opioid antagonist is administered to any student or other individual on district premises is administered; and

(F) Confidentiality of student health information contained within the education record.

~~(A) Safe storage, methods for administration, handling, monitoring supply and disposing of medications;~~

~~(B) Transcribing, record keeping and reporting of medication administration, including errors in administration;~~

~~(C) The role of designated personnel to monitor student responses to medication;~~

~~(D) Emergency medical response for life threatening side effects and allergic reactions, including the administration of premeasured doses of epinephrine to students and other individuals; and~~

~~(E) Confidentiality of student health information contained within the education record.~~

(4) Policies and procedures for the administration of medication by a student to themselves~~f~~ without assistance from designated personnel shall:

(a) Permit a student to administer prescription or nonprescription medication to themselves~~f~~ where the student can demonstrate the ability, developmentally and behaviorally, to self-administer medication and has permission to self-administer medication from a school building administrator, and a prescriber or registered nurse practicing in a ~~school~~district setting;

~~(b) Permit a student to administer non-prescription medication to themself where the student is able to demonstrate the ability, developmentally and behaviorally, to self- administer medication and the student has permission to self- administer medication from a building administrator;~~

(b~~c~~) Require parental or guardian consent; ~~except where a student is allowed to seek medical care without parental consent pursuant to ORS 109.610, 109.675, and 109.640;~~

(c~~d~~) For nonprescription medication that is not approved by the Federal Drug Administration, require a written order from the student's prescriber that includes the name of the student, name of the medication, dosage, method of administration, frequency of administration, a statement that the medication must be administered while the student is in school, at a district-sponsored activity, under the supervision of district personnel, or in transit to or from school or

district-sponsored activities ~~is in school~~, any other special instructions, and the signature of the prescriber;

(d) Require that backup medication, if provided by a student's parent or guardian, be kept at the student's school in a location to which the student has immediate access in the event the student has an asthma or severe allergy emergency per ORS 339.866;

(e) Include process for a district to revoke its permission for a student to self-administer medication if the student does not responsibly self-administer the medication or abuses the use of the medication; and

(f) Include a process for determining if or when a student may self-carry prescription medication when the student has not been approved to self-administer medication.

~~(e) Include policies and procedures for the self-administration of medication by kindergarten through grade 12 students with asthma or severe allergies that comply with ORS 339.866;~~

~~(f) Address the following:~~

~~(A) Safe storage, methods for administration, handling, and disposing of medications;~~

~~(B) Record keeping;~~

~~(C) Whether student response to medication should be monitored by designated personnel and the role of designated personnel in such monitoring;~~

~~(D) Emergency medical response for life threatening side effects and allergic reactions, including the administration of premeasured doses of epinephrine; and~~

~~(E) Confidentiality of student health information contained within the education record.~~

~~(5) Policies and procedures for the administration of naloxone or any similar medication that is designed to rapidly reverse an overdose of an opioid drug by trained school personnel to any student or other individual on school premises who the personnel believe in good faith is experiencing an overdose of an opioid drug shall:~~

~~(a) Include a process to designate and supervise appropriate school personnel that takes into account when students or others are in school or at a school-sponsored activity.~~

~~(b) Require designated personnel to successfully complete training developed by the Oregon Health Authority on the administration naloxone every three years. The training must be delivered in accordance with rules adopted by the Oregon Health Authority.~~

~~(c) Permit designated personnel to administer naloxone or any similar medication that is designed to rapidly reverse an overdose of an opioid drug by trained school personnel to any student or other individual on school premises who the personnel believe in good faith is experiencing an overdose of an opioid drug.~~

~~(d) Address the following:~~

~~(A) Safe storage, accessibility and availability of the medication during an emergency, methods for administration, handling, and disposing of medications;~~

~~(B) Record keeping;~~

~~(C) Whether response to medication should be monitored by designated personnel and the role of designated personnel in such monitoring;~~

~~(D) Emergency medical response procedures following administration of the medication; and~~

~~(E) Confidentiality of health information for the person receiving the administration of medication.~~

**Commented [SO1]:** Rewritten to align with HB 2395 (2023) and SB 1552 (2024)

5(a) A district may adopt policies and procedures to allow school district personnel to administer a short-acting opioid antagonist medication to any student or other individual who the district personnel believe in good faith is experiencing an overdose of an opioid drug.

(b) A district shall provide to the parent or legal guardian of each minor student enrolled in a school in the district information regarding short-acting opioid antagonists. The information described in this subsection must include at least:

(A) A description of short-acting opioid antagonists and their purpose;

(B) A statement regarding, in an emergency situation, the risks of administering to an individual a short-acting opioid antagonist and the risks of not administering to an individual a short-acting opioid antagonist;

(C) A statement identifying which schools in the district, if any, will have short-acting opioid antagonists, and the necessary medical supplies to administer short-acting opioid antagonists, on site and available for emergency situations; and

(D) A statement that a representative of a district may administer to a student a short-acting opioid antagonist in an emergency if the student appears to be unconscious and experiencing an opioid overdose.

(c) A school district board shall ensure that the parent or legal guardian of a minor student enrolled in a school within the school district is immediately notified when a short-acting opioid antagonist is administered to the student if the short-acting opioid antagonist is administered while the student is at school, on school property under the jurisdiction of the school district or at any activity under the jurisdiction of the school district.

(6) District personnel shall not recommend to a parent or legal guardian of a student that the student seek a prescription for a medication that is prescribed with the intent of affecting or altering the thought processes, mood or behavior of the student.

(7) District personnel shall not require a child to obtain a prescription for a substance covered by the Controlled Substances Act, 21 U.S.C. 801 et seq., as a condition of attending school, receiving an evaluation to determine eligibility for Section 504 of the Rehabilitation Act of 1973, early childhood special education or special education under ORS chapter 343 or receiving early childhood special education or special education services.

(8~~6~~) A registered nurse who is employed by a ~~public or private school~~district ~~or by an education service district~~ or a local public health authority as defined in ORS 431.003 to provide nursing services at a ~~public or private school~~ district may accept an order from a physician licensed to practice medicine or osteopathy in another state or territory of the United States if the order is related to the care or treatment of a student who has been enrolled at the ~~school~~ district for not more than 90 days.

**Statutory/Other Authority:** ORS 326.051
Statutes/Other Implemented: ORS 339.866, 339.867, 339.869, 339.870, 339.871, 339.873, 339.874, 678.038, ~~SB 665~~
History:
ODE 48-nu2020, amend filed 11/24/2020, effective 11/24/2020
ODE 15-2020, amend filed 04/23/2020, effective 04/23/2020
ODE 20-2017, amend filed 11/07/2017, effective 11/07/2017
ODE 10-2017, f. & cert. ef. 6-29-17
ODE 19-2016, f. & cert. ef. 3-22-16
ODE 21-2014, f. & cert. ef. 6-3-14
ODE 4-2010, f. & cert. ef. 3-18-10
ODE 17-2009, f. & cert. ef. 12-10-09
ODE 8-2005, f. & cert. ef. 3-23-05
ODE 10-1999, f. & cert. ef. 2-12-99
ODE 6-1998, f. & cert. ef. 4-23-98
ODE 3-1998(Temp), f. & cert. ef. 2-27-98 thru 8-25-98

# OAR 581-021-0037 (Administration of Medication)

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Tenneal Wetherell, Chief of Staff
Ely Sanders, School Health Services Specialist

# Administration of Medication

**Subject:** OAR 581-021-0037 (Medication Administration) establishes district requirements for the administration of prescription, nonprescription, during school hours/programming (by staff and self-administration by student). ORS 339.869 gives the State Board of Education the authority to adopt rules for the administration of prescription and nonprescription medication to students by trained school personnel and for student self-medication.

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**Background:** OAR 581-021-0037 was established in 1998 and outlines requirements related to the administration of medication to students. This OAR has been updated at least 12 times (twice since 2020).

**Draft Rule Update:** This draft rule updates language regarding opioid antagonists and includes technical fixes that address concerns and feedback received from school districts and other education partners, adds language from statute that prohibits recommending or requiring medication to attend school, adds option for districts to have a stock medication program, and increases clarity and readability.

# Administration of Medication

**General Updates to OAR 581-021-0037:**

- Updates and adds OAR/ORS citations
- Removes section related to severe allergies and adrenal insufficiency that was added to OAR 581-022-2220 (June 2023)
- Aligns definitions with the Oregon Board of Pharmacy and the Oregon Board of Nursing
- Consolidates medication administration training to one section of OAR
- Adds ORS requirement for a "process by which the parent or guardian of a student may request in writing that backup prescribed auto injectable epinephrine be kept at a reasonably secure location in a student's classroom if…" (ORS 339.866)
- Adds prohibition that school personnel not recommend to a parent or legal guardian of a student that the student seek a prescription for a medication that is prescribed with the intent of affecting or altering the thought processes, mood or behavior of the student (ORS 339.873)

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# Updates That Allow Board Discretion

- Medication administration training
- Removal of reference to minor's privacy rights
- District stock medication program
- Opioid antagonists

# Administration of Medication

## Medication Administration Training

(C~~B~~) ~~The t~~Training for designated personnel ~~must~~ to administer medications to students must align with the ODE Medication Administration Training and at a minimum include a discussion of applicable district policy, procedures and materials, and include the following elements: ~~be based on requirements set out in guidelines that are approved by the Oregon Department of Education and include a discussion of applicable district policies, procedures and materials;~~

(i) Safe storage, administration, handling, and disposing of medications;

(ii) Accessibility of the medication during an emergency;

(iii) Record keeping;

(iv) Whether response to medication should be monitored by designated personnel and the role of designated personnel in such monitoring;

(v) Emergency medical response procedures following administration of the medication;

(vi) Confidentiality of health information, and

(vii) Assessment of gained knowledge.

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# Administration of Medication

## Medication Administration Training:

(DC) The first training for a designated district personnel and every third training thereafter must be provided in-person. During the intervening subsequent years, designated district personnel may complete an online training that has been approved by the Oregon Department of Education so long as a trainer is available within a reasonable time following the training to answer questions and provide clarification. For the 2020-2021 school year,

(E) An online training may to qualify as "in-person" a distance training format may only be considered when these measures are can be met: 436

(i) Content is provided via synchronous, interactive online sessions with the trainer and learners visible on screen.

(ii) Trainers must be licensed and work within their scope of practice.

(iii) Include in-person, skills demonstration for training developed by the Oregon Health Authority for epinephrine, glucagon, and for medication to treat adrenal insufficiency.

(F) District shall maintain documentation of district personnel's completion of training as required by OAR 166-400-0010.

(G) In alignment with district board policy, any district personnel may be allowed to administer a non-injectable, short-acting opioid antagonist to any student or other individual on district premises who the personnel believe in good faith is experiencing an overdose of an opioid drug without receiving medication administration training.

# Administration of Medication

**Removal of reference to minor's privacy rights:**

(c) Permit designated personnel to administer prescription medication where:

(A) Because of its prescribed frequency or schedule, the medication must be given while in school, at a ~~school~~ district-sponsored activity, while under the supervision of school personnel, and in transit to or from school or ~~school~~ district-sponsored activities;

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(B) The student's parent or guardian has provided written permission. ~~or the student is allowed to seek medical care without parental consent pursuant to ORS 109.610, 109.675 and 109.640; and~~

# Administration of Medication

**District stock medication program:**

(d) Permit designated personnel to administer nonprescription medication where:

(A) The nonprescription medication is necessary for the student to remain in school;

(B) The nonprescription medication is provided in the original manufacturer's container by the student's parent or guardian; or ~~of the student~~

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(i) The nonprescription medication is part of a district's stock medication program in compliance with the Oregon Board of Pharmacy rules including OAR 855-035-0005.~~;~~

# Administration of Medication

**Opioid antagonist:**

5(a) A district may adopt policies and procedures that provide for the administration of a short-acting opioid antagonist medication that is designed to rapidly reverse an overdose of an opioid drug by any district administrator, teacher or other designated personnel to any student or other individual who the district personnel believe in good faith is experiencing an overdose of an opioid drug.

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# Administration of Medication

**Opioid antagonists:**

(b) A district shall provide to the parent or legal guardian of each minor student enrolled in a school in the district information regarding short-acting opioid antagonists. The information described in this subsection must include at least:

(A) A description of short-acting opioid antagonists and their purpose;

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(B) A statement regarding, in an emergency situation, the risks of administering to an individual a short-acting opioid antagonist and the risks of not administering to an individual a short-acting opioid antagonist;

(C) A statement identifying which schools in the district, if any, will have short-acting opioid antagonists, and the necessary medical supplies to administer short-acting opioid antagonists, on site and available for emergency situations; and

(D) A statement that a representative of a district may administer to a student a short –acting opioid antagonist in an emergency if the student appears to be unconscious and experiencing an opioid overdose.

# Administration of Medication

**Opioid antagonists:**

(c) A school district board shall ensure that the parent or legal guardian of a minor student enrolled in a school within the school district is immediately notified when a short-acting opioid antagonist is administered to the student if the short-acting opioid antagonist is administered while the student is at school, on school property under the jurisdiction of the school district or at any activity under the jurisdiction of the school district.

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# Impacts: Administration of Medication

**Racial Equity:**

- Many students rely on medications to manage chronic conditions such as asthma, diabetes, and allergies. Proper medication administration in schools ensures that students have access to the medications they need to stay healthy and focused on their education. This is particularly important for students from racial and ethnic minority backgrounds who may face barriers to accessing healthcare outside of school due to factors such as lack of insurance, transportation issues, or language barriers.

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**Fiscal/Economic & Small Business Impact:**

- No state agencies, local governments, and/or members of the public are likely to be economically affected by the rule change.
- There is no anticipated cost related to compliance for districts, education partners, families, or small businesses.

# Administration of Medication

**Engagement:**

- Multiple engagement sessions with ODE's School Nurse Advisory Group
- Virtual engagement session with the Oregon School Nurses Association (10/23)
- 2 Virtual engagement sessions for school district, ESD, and charter school staff (4/24)
- 2 Virtual engagement sessions for education partners with representatives from the Central Oregon Disability Support Network, and the State Advisory Council for Special Education
- Meetings, rule review, and comment with Oregon School Board Association (OSBA), Oregon Coalition of School Administrations (COSA), and the Oregon School Employees Association (OSEA)
- Oregon Health and Sciences University's Family to Family Information Center (4/24)
- Department of Justice rule draft review (4/24)
- ODE Office of American Indian/Alaska Native Education (10/23)

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# Feedback: DRAFT Rule Revision 581-021-0037

| Policy Issue or Concern Raised | Action on Feedback Received |
|---|---|
| **Definitions:**<br>1. Add definition of “delegation” to differentiate medication administration done as part of nurse delegation.<br>2. Add definition of “district” to clarify that the OAR requirements pertain to school districts, ESDs, and public charter schools. | **Addressed in Rule**<br>• Adjusted draft rule to include definitions of both "delegation” and “district” consistent with input received.<br>• Added language in Section 2 of OAR 581-021-0037 that clarifies that medication may be administered as part of a nurse delegation: Medications, including injectable medications, may be administered by district personnel as part of a formal delegation by a Registered Nurse. |

# Feedback: DRAFT Rule Revision 581-021-0037

| Policy Issue or Concern Raised | Action on Feedback Received |
|---|---|
| **Staff supports**<br>• Feedback from engagement session included the desire to add clarity that school district must "ensure district staff are trained, willing, capable, appropriately supervised and have access to a school nurse." | **Addressed in Rule and Guidance**<br>• Adjusted draft to include the following language: *Ensure designated staff have received medication administration training and have access to a school nurse as per OAR 581-022-2220*<br>• The terms "willing," "capable," and "appropriately supervised" are subjective or intersect with employee and employer relations. It was determined that reference to the willingness and capability of staff may be better placed in future guidance. |

# Feedback: DRAFT Rule Revision 581-021-0037

| Policy Issue or Concern Raised | Action on Feedback Received |
| --- | --- |
| **District Stock Medication**<br>• Initial feedback noted that districts wanted the option to have stock medication programs and that the requirement for all medication to be provided by parents to the district in the original manufacture's original packaging was a burden to districts and families.<br>• Additional feedback noted the importance of future guidance related to implementation of district stock medication programs | **Addressed in Rule and Guidance**<br>• Added language to section 3(d)(B) that allows nonprescription medication that is part of a district's stock medication program in compliance with the Oregon Board of Pharmacy rules including OAR 855-035-0005.<br>• ODE plans to partner with the Oregon Health Authority Oregon, the Oregon Board of Pharmacy, and the Oregon School Nurses Association to draft guidance to support district implementation of stock medication programs. |

# Feedback: DRAFT Rule Revision 581-021-0037

| Policy Issue or Concern Raised | Action on Feedback Received |
| --- | --- |
| **Minor Consent to Medication Administration**<br>• Initial feedback included concerns that OAR 581-021-0037 referenced minor consent statutes that were not applicable to medication administration in a school setting.<br>• Feedback on the draft rule noted concerns related to the removal of referenced statutes and the ability for minors to consent to medication administration.<br>• Additional feedback included safety concerns related to implying that minor students can consent to medication administration while the Family Education Rights Privacy Act (FERPA) allows parents and guardians access to student education records. | **Addressed in Rule**<br>• Removed reference to minor consent in draft rule. |

# Administration of Medication

ODE is grateful for the opportunity to present at the State Board of Education. We plan to continue engagement and consider feedback during the rulemaking process.

| Activity | Date |
|---|---|
| Engagement on draft rule revision 581-021-0037 | Oct 2023-Present |
| Rules Advisory Committee: Presentation | April 4 |
| State Board of Education: 1st Read | April 18 |
| Rules Advisory Committee: Follow-up | May 2 |
| State Board of Education: 2nd Read/possible adoption | June 13 |
| Communication and guidance to the field. | Summer 2024 |

# Questions?

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Rev. 4/16/2024

This is a draft document for review, engagement, and feedback from partners. If you have any thoughts or comments, please contact Sam Ko @ 503-931-4103 or sam.ko@ode.oregon.gov .

DRAFT Juvenile Corrections Education Funding Model OAR

**581-015-2940**
**Juvenile Corrections Education Funding Model**

(1) The Department of Education shall provide State School Funding to the Juvenile Detention Education Program (JDEP) based on anticipated Average Daily Membership times 1.5 ADMw for the school year.

(2) The Department of Education shall provide State School Funding to the Youth Corrections Education Programs (YCEP) based on anticipated Average Daily Membership times 2.0 ADMw for the school year.

(3) The Department of Education shall determine the number of classrooms to be funded at each JDEP and each YCEP school using the methodology of:

(a) a classroom for every 8 ADM for JDEP and YCEP schools with 48 ADM or below and

(b) An additional classroom for every 10 ADM above 48 ADM.

(c) Based on the cost of operating a JDEP or YCEP classroom, with input from stakeholders, the Department of Education will determine the level of funding per classroom.

(4) Based on available funding, the Department of Education will fund each classroom.

(a) If the total state funding available for all JDEP and YCEP schools is less than the total state funding needed to fully fund each classroom, the amount of state funding for each classroom determined under paragraph (3) of this subsection will be prorated.

(5) Based on remaining available funding after the allocations for the classrooms have been determined and calculated, each JDEP school and each YCEP school may apply for funding based on the below criteria:

(a) The diversity of the student population being served, including the number or percentage of youth from historically underserved populations.

(b) The characteristics of the facility, including the number of classrooms in use.

(c) The number of students who are enrolled in the school.

(d) The percentage of students qualifying for special education services.

(e) The level of re-entry transition support offered by the educational provider.

(6) Oregon State Funding may be transferred between the JDEP and YCEP programs.

## Oregon State Board of Education
## April 18, 2024
AGENDA ITEM: 7.D.

| | |
|---|---|
| **SUBJECT:** Title of topic/OAR # and Title Juvenile Corrections Education Funding OAR 581-015-2940<br>**STAFF NAME & OFFICE**: Sam Ko, Office of Enhancing Student Opportunities<br><br>The Juvenile Corrections Education, which consists of the Juvenile Detention Education Program (JDEP) and the Youth Correction Education Program (YCEP), have consistently been underfunded due to low ADMw levels at each JDEP and YCEP school. Furthermore, the students have multiple educational and mental health challenges in addition to safety and security concerns that must be addressed so that the students can achieve academically. HB 5014 (2023) provided Juvenile Corrections Education with an ongoing General Fund allocation of $8.3 million of General Fund (GF), an allocation methodology, and flexibility to transfer funds between the two programs.<br><br>☒ New Rule<br>☐ Amend Existing Rule<br>☐ Repeal Rule | ☒ **First Reading**<br>☒ **Presentation**<br>☐ **No Presentation**<br>☐ **Action**<br>☐ **Temp Rule**<br>☐ **Presentation**<br>☐ **No Presentation** |

**BACKGROUND**

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

1. History: HB 5014 (2023) provided Juvenile Corrections Education with an ongoing General Fund allocation of $8.3 million of General Fund (GF), an allocation methodology, and flexibility to transfer funds between the two programs. The current statute and rule states funding be distributed by 1.5 ADMw for JDEP and 2.0 ADMw for YCEP.
2. Purpose: The new OAR will supplement the current OAR 581-023-0022 "Funding for Youth Corrections and Juvenile Detention Education Programs" within Division 23 of the School Finance division. The new OAR detail the methodology of providing both GF and SFF to each JDEP and YCEP school as written in HB 5014. When determining the funding level of each JDEP and YCEP school, the Department of Education shall consider the five below factors:
    a) The diversity of the population being served, including the number or percentage of youth from historically underserved populations;
    b) The characteristics of the facility including the number of classrooms in use;
    c) The number of students served in the program;
    d) The percentage of students qualifying for special education services; and
    e) The level of transition support offered by the provider.
3. Does the board have any areas of discretion or is this strictly mirroring statute? – Although most of the draft OAR mirrors HB 5014, the sections of determining the number of classrooms and the ability to pro-rate the amount for each individual JDEP or YCEP school when there are insufficient funds , is at the discretion of the State Board of Education.
4. Stakeholder voice/input (individual and collective i.e., groups) – During the development process of the OAR, engagement sessions were held with the Oregon Health Authority (OHA), Oregon Department of Human Services (ODHS), Oregon Youth Authority (OYA), Oregon Juvenile

Department Directors Association (OJDDA), School Districts (SD), and Education Service Districts (ESD). Once draft OARs were crafted, parents and students of the Oregon Youth Authority, many of whom were also involved in the JDEP program, were engaged for their input and feedback. Besides the students within the JDEP and YCEP programs, the Juvenile Corrections Education Funding OAR will directly impact the School Districts and Education Service Districts that are currently providing educational services in the eleven secure county juvenile detention and nine OYA secure close custody facilities.

**SUMMARY OF PREVIOUS BOARD ACTION**

1. This has not been brought before the State Board of Education.

**HAS THE RULE CHANGED SINCE LAST BOARD MEETING?**

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

**POLICY ISSUE OR CONCERNS**

During the engagement sessions, no concerns were raised by any of the participants.

**EQUITY IMPACT ANALYSIS**

Unfortunately, a disproportionate number of students of color are detained in county juvenile detention facilities and incarcerated in Oregon Youth Authority secure close custody facilities. The increased financial investment of $8.3 million will provide increased educational and re-entry transition services to the students so that they will have the resources and assistance they need to attain a high school diploma or GED. In addition, two of the five criteria for funding specifically address diversity of the student population from underserved populations and the eligibility for Special Education services.

**Commented [HO1]:** Where are the 5 criteria listed? This could be a confusing reference if they don't know what the 5 criteria are.

**Commented [SK2R1]:** The five criteria are listed in the draft OAR. Also, listed the five factors to #2 in the summary section.

**FISCAL ANALYSIS**

With the additional ongoing investment of General Fund allocation of $8.3 million, partnering school districts and education service districts that provide the educational services within the JDEP and YCEP programs will see an increase in funding to hire more staff, procure supplies and equipment, and to provide increased services to the students.

**EFFECT OF A "YES" OR "NO" VOTE**

Currently, Oregon Department of Education JDEP and YCEP programs already implement the language from HB 5014. Without this OAR there might be some ambiguity and questions about the

authority and ability of the current practice by the Oregon Department of Education JDEP and YCEP programs.

**STAFF RECOMMENDATION**

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

**ATTACHMENTS**

Attachment 1: Juvenile Corrections Education draft OAR presentation ppt
Attachment 2: 24April draft OAR Juvenile Corrections Educational Funding model

# HB 5014 (2023) Juvenile Corrections Education Funding Draft OARs

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# Impact of HB 5014 (2023)

Juvenile Corrections Education, which consists of the Juvenile Detention Education Program (JDEP) and the Youth Correction Education Program (YCEP), have consistently been underfunded due to low ADMw levels at each JDEP and YCEP school. Furthermore, the students have multiple educational and mental health challenges in addition to safety and security concerns that must be addressed so that the students can achieve academically. HB 5014 (2023) provided Juvenile Corrections Education with an ongoing allocation of $8.3 million of General Fund (GF), an allocation methodology, and flexibility to transfer funds between the two programs.

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# JDEP & YCEP Description

The Juvenile Detention Education Programs (JDEP) and Youth Corrections Education Programs (YCEP) provide educational services for students incarcerated in the juvenile justice system facilities. The Oregon Department of Education (ODE) is responsible to provide and fund educational services for the students and partners with School Districts (SDs) and Education Service Districts (ESDs) to provide the educational services in the facilities around the state. The educational year is 11 months (220 days at 5.5 hours a day) which results in a 22% increase from the traditional 9 month educational year. Regardless of the average student count, ODE strives to have a full-time licensed teacher as well as Special Education and ELL services at every JDEP and YCEP school.

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# 22-23 JDEP Information

## General Information

- 11 JDEP schools with 9 SD/ESD educational providers
- Approximately 103.39 ADM with average length of stay of 16.1 calendar days (majority is 3 to 5 days, however Measure 11 youth skew the data)
- 220 day academic calendar with 5.5 hours a day
- 1,435 unduplicated students entered and exited JDEP; roughly 13.88 times the ADM
- Of the 1,435 students, 1,110 were males, 308 female, and 17 non-binary students
- Of the 1,435 students, 463 students (32.26%) of the students are eligible for IDEA services and 120 students (8.36%) were Limited English Proficiency
- Students are placed by courts, juvenile department, OYA, and local law enforcement

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# 22-23 YCEP Information

## General Information

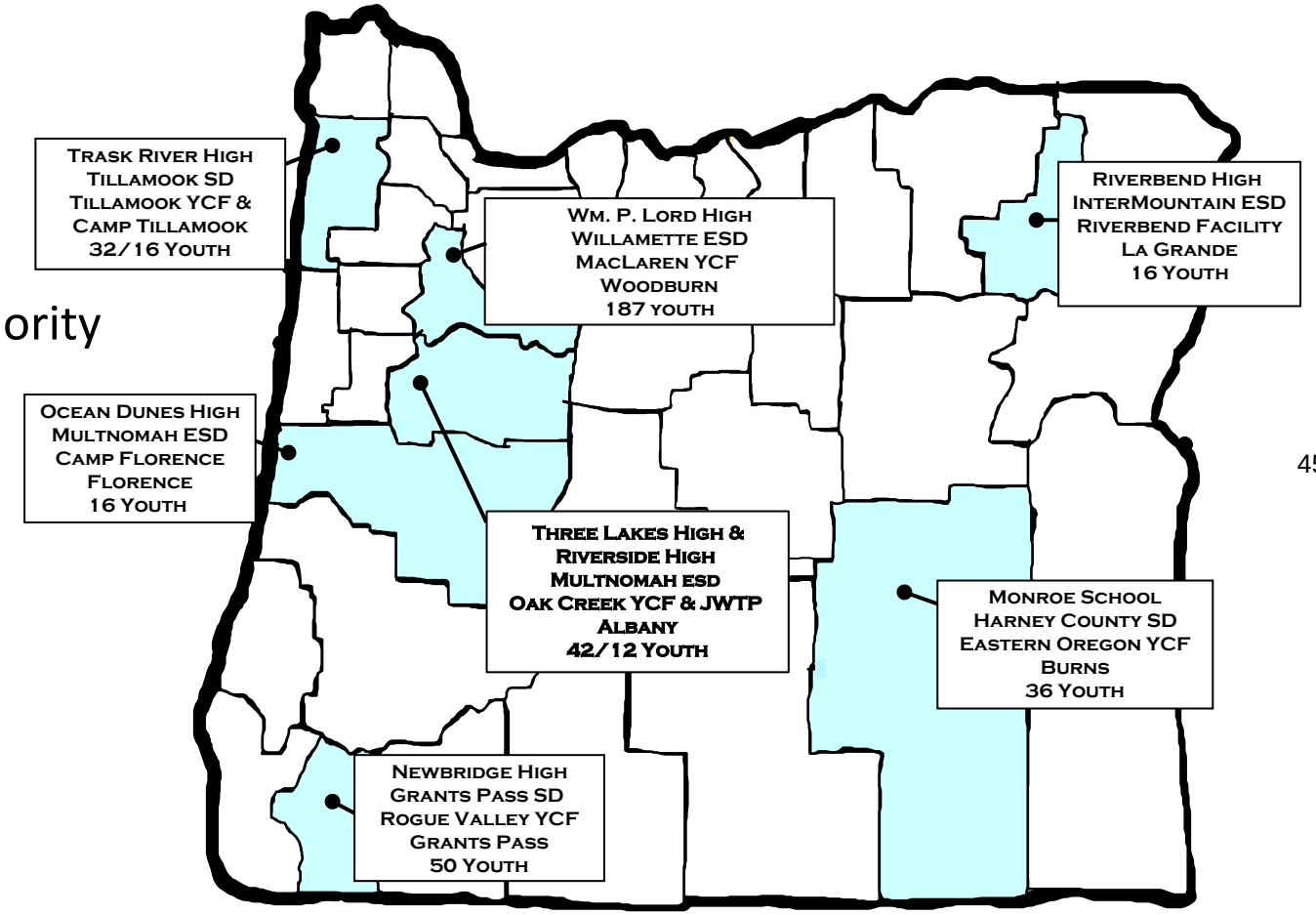
- 8 YCEP schools with 6 SD/ESD educational providers
- Approximately 241.20 ADM with average length of stay of 126.34 calendar days
- 220 day academic calendar, 5.5 hrs a day
- 589 unduplicated students entered and exited YCEP; roughly 2.45 times ADM
- Of the 589 students, 456 were males, 114 female, and 19 non-binary student
- Of the 589 students, 231 students (39.22%) of the students are eligible for IDEA services and 42 students (7.13%) were Limited English Proficiency
- Students are placed by courts, juvenile department, OYA, and local law enforcement

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# Youth Corrections Education Programs (YCEP)

## Youth Corrections Education Program

- 8 YCEP schools in Oregon Youth Authority close custody facilities
  - Harney SD
  - Inter-Mountain ESD
  - Multnomah ESD
  - Tillamook SD
  - Grants Pass SD
  - Willamette ESD

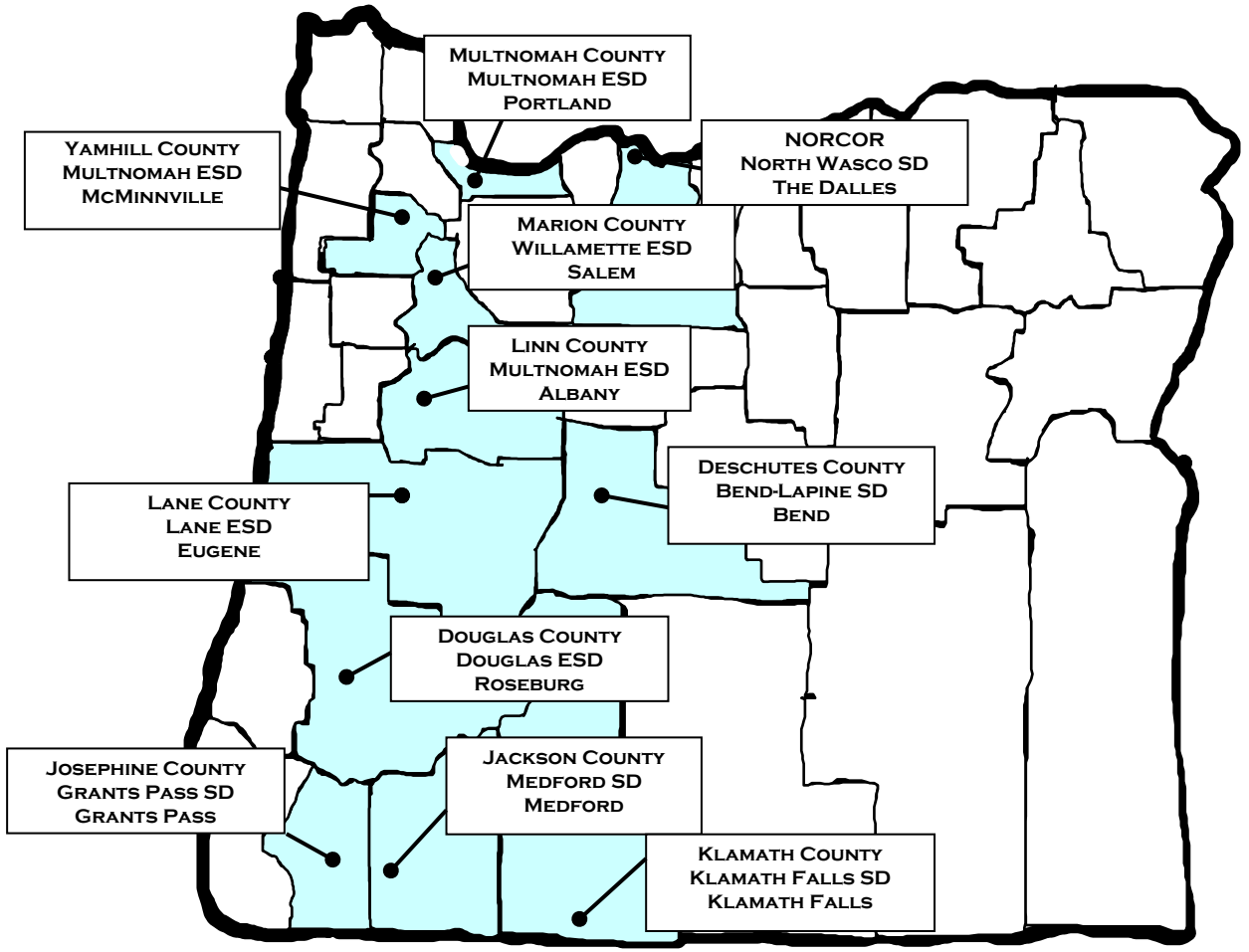



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# Juvenile Detention Education Programs (JDEP)

## Juvenile Detention Education Program

- 11 JDEP schools in county juvenile detention facilities
  - Bend-LaPine SD (COIC)
  - Douglas ESD
  - Grants Pass SD
  - Klamath SD
  - Lane ESD
  - Medford SD
  - Multnomah ESD
  - North Wasco SD
  - Willamette ESD




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# Differences between JDEP and YCEP

## JDEP

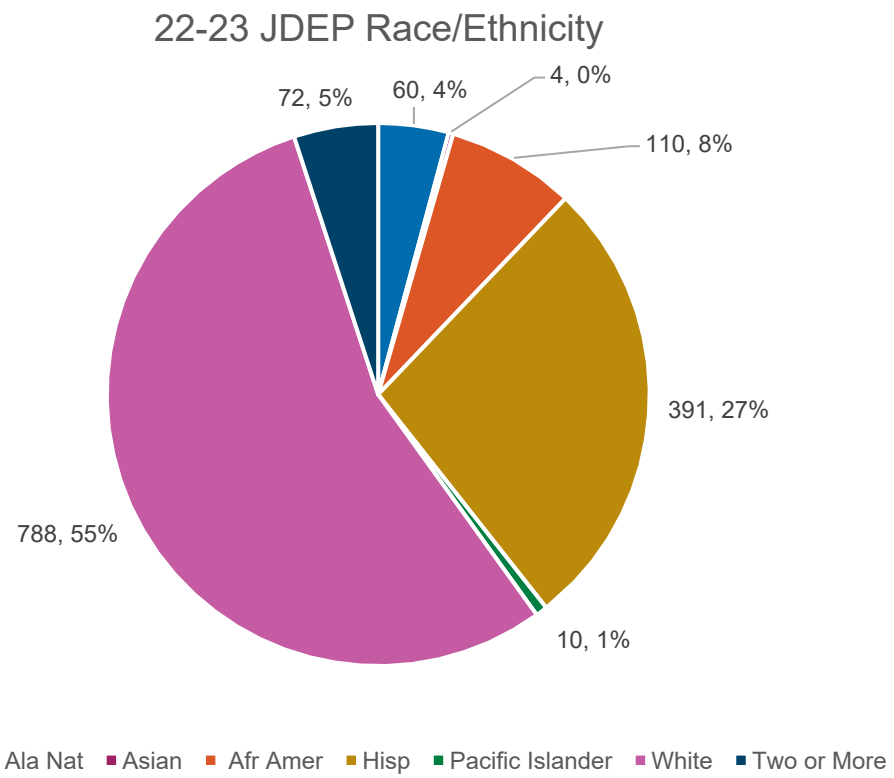
- County Juvenile Detention Facilities
- Short term students
- All except Multnomah are single or two classroom locations
- Due to the short-term stay, while in JDEP schools, students do not earn high school diplomas or GEDs
- Statutorily 1.5 ADMw State School Funding

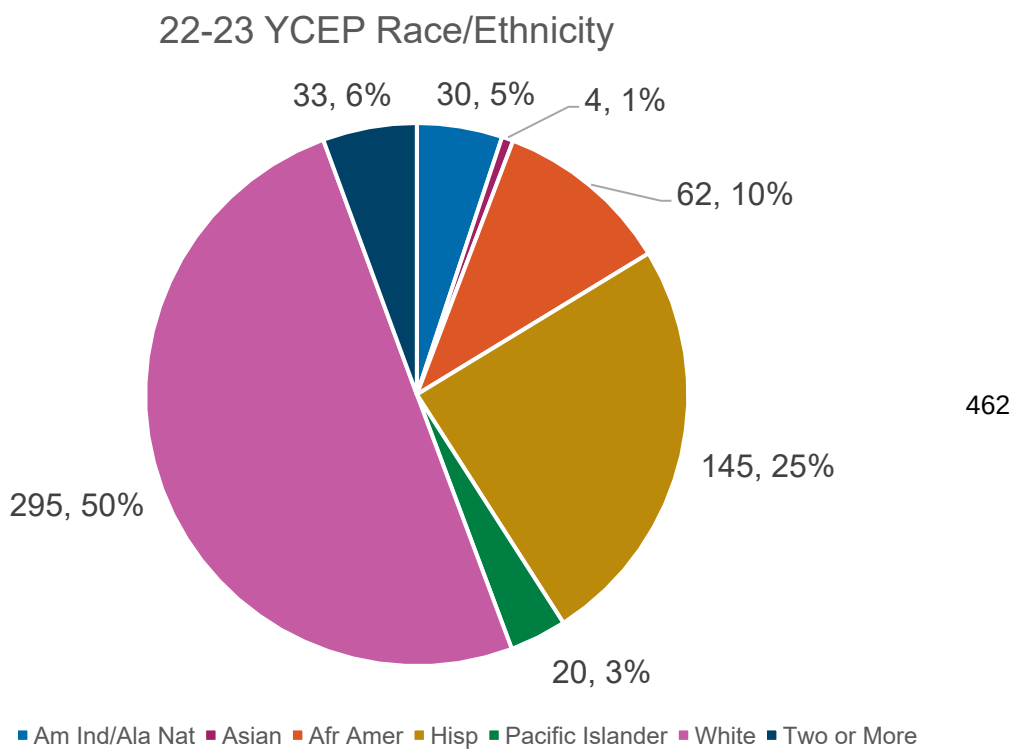
## YCEP

- Oregon Youth Authority secure close custody facilities
- Long-term students
- Multi-classroom schools
- Students earn and awarded high diplomas and GED certificates
- Statutorily 2.0 ADMw State School Funding

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# 22-23 Race/Ethnicity

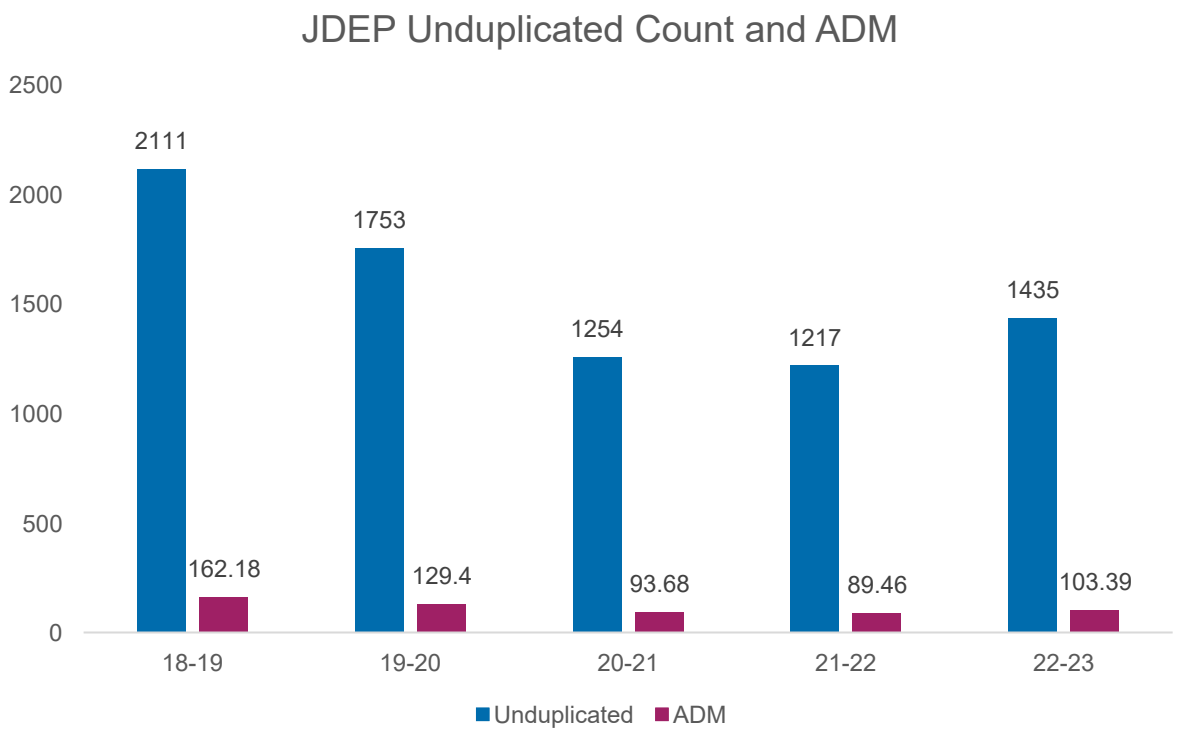


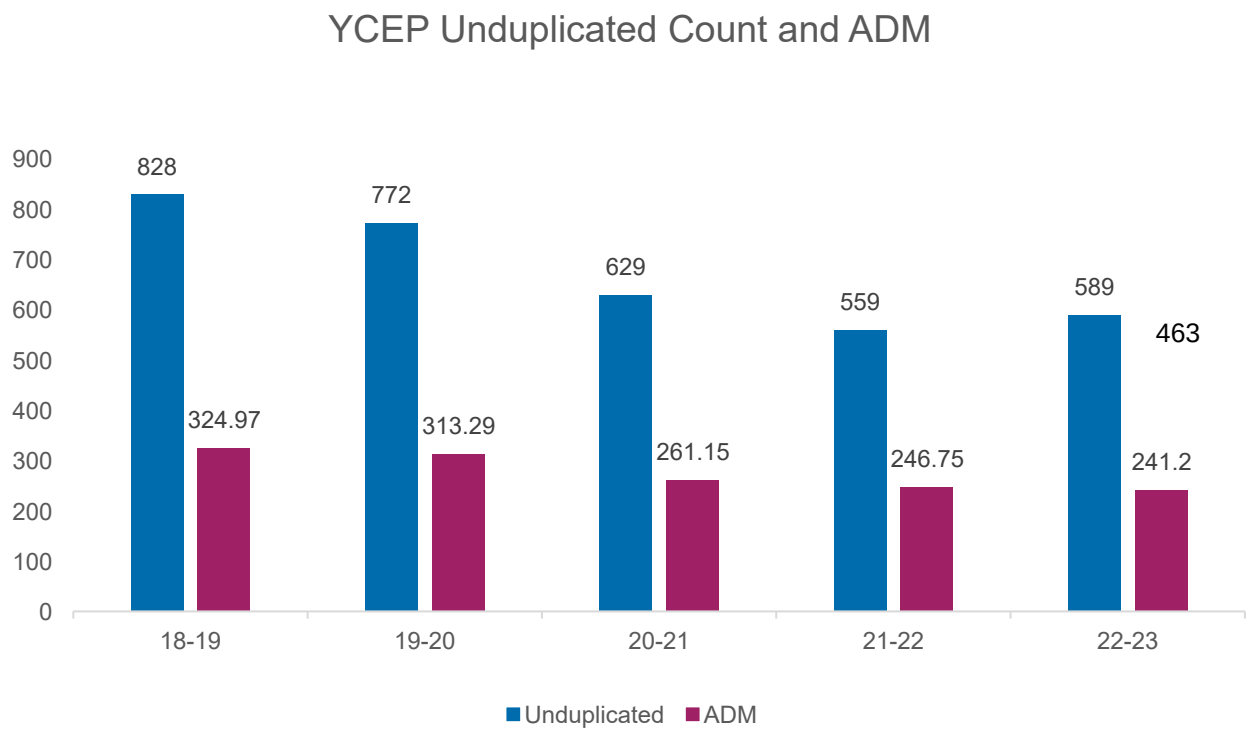




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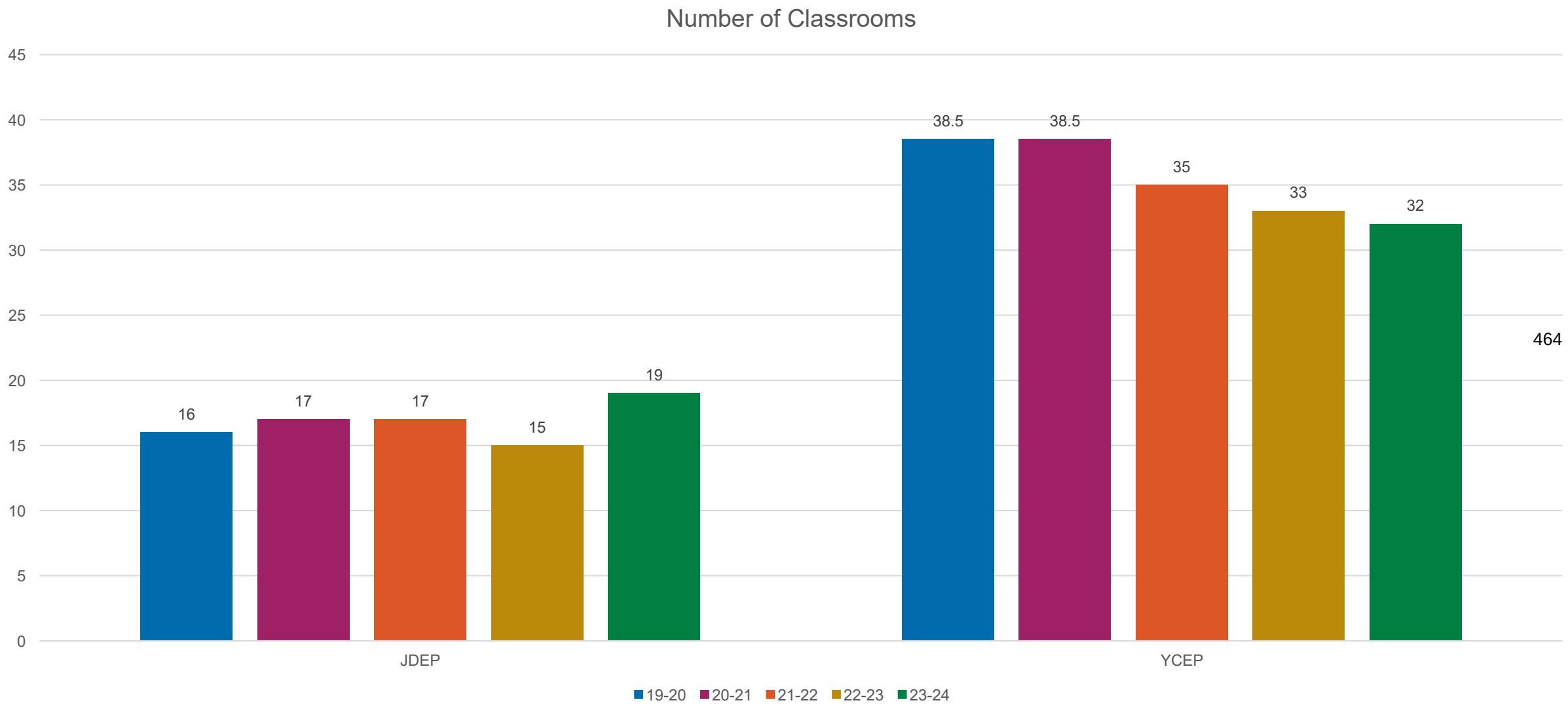
Students of color are in greater numbers in YCEP, thus navigating deeper into the juvenile justice system.

# Unduplicated Count and ADM

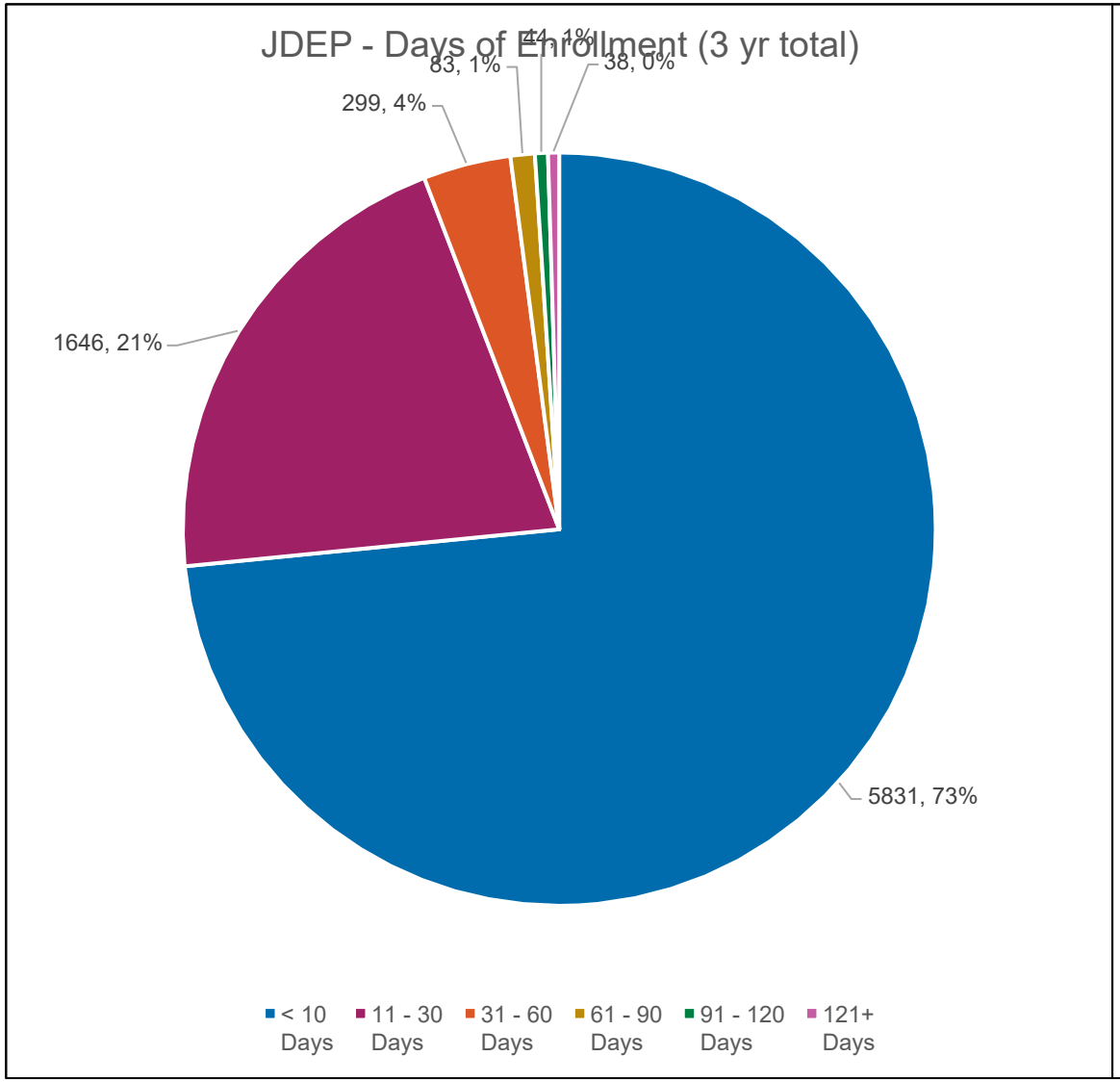


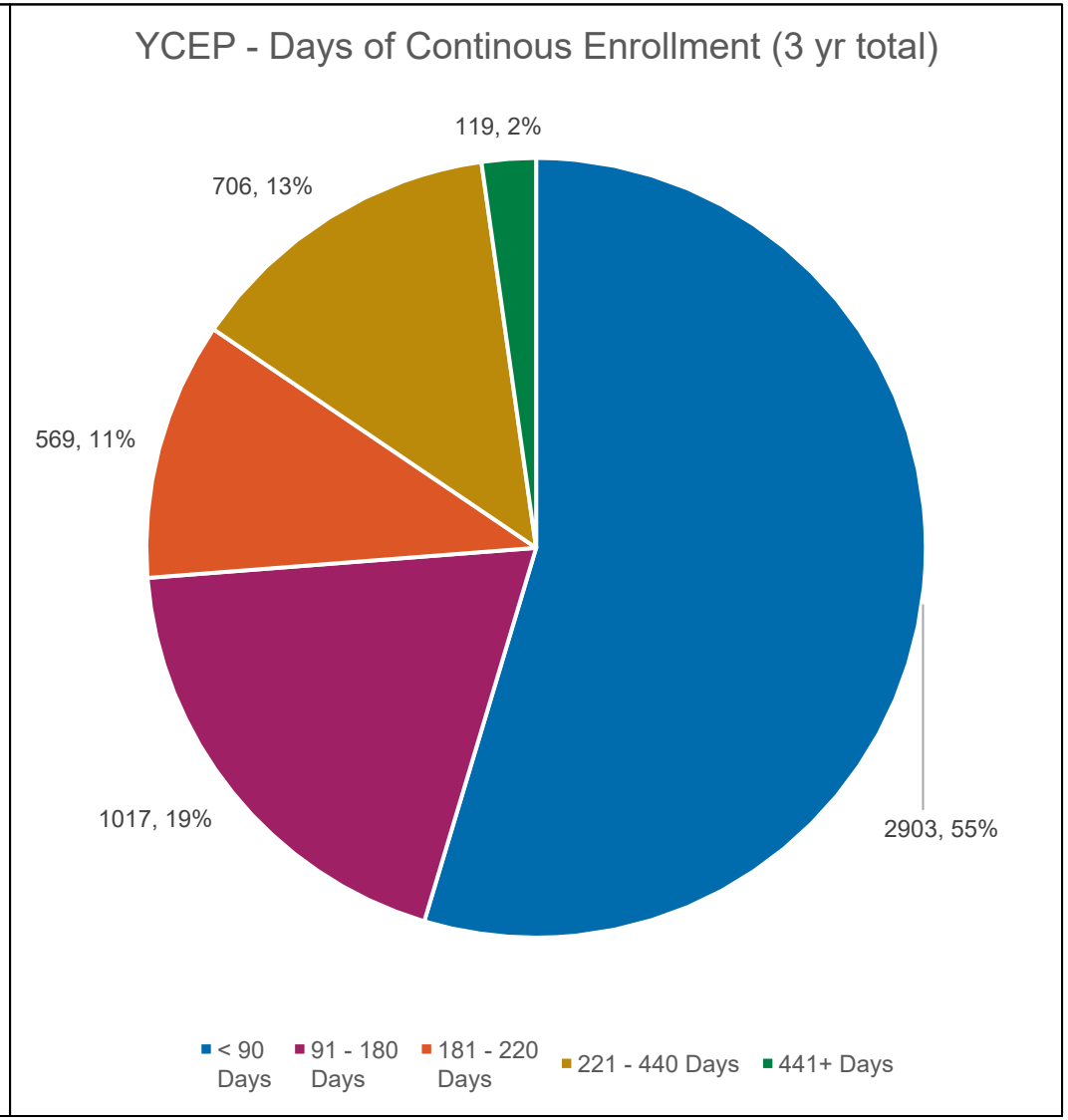



# Number of Classrooms



# Days of Continuous Enrollment




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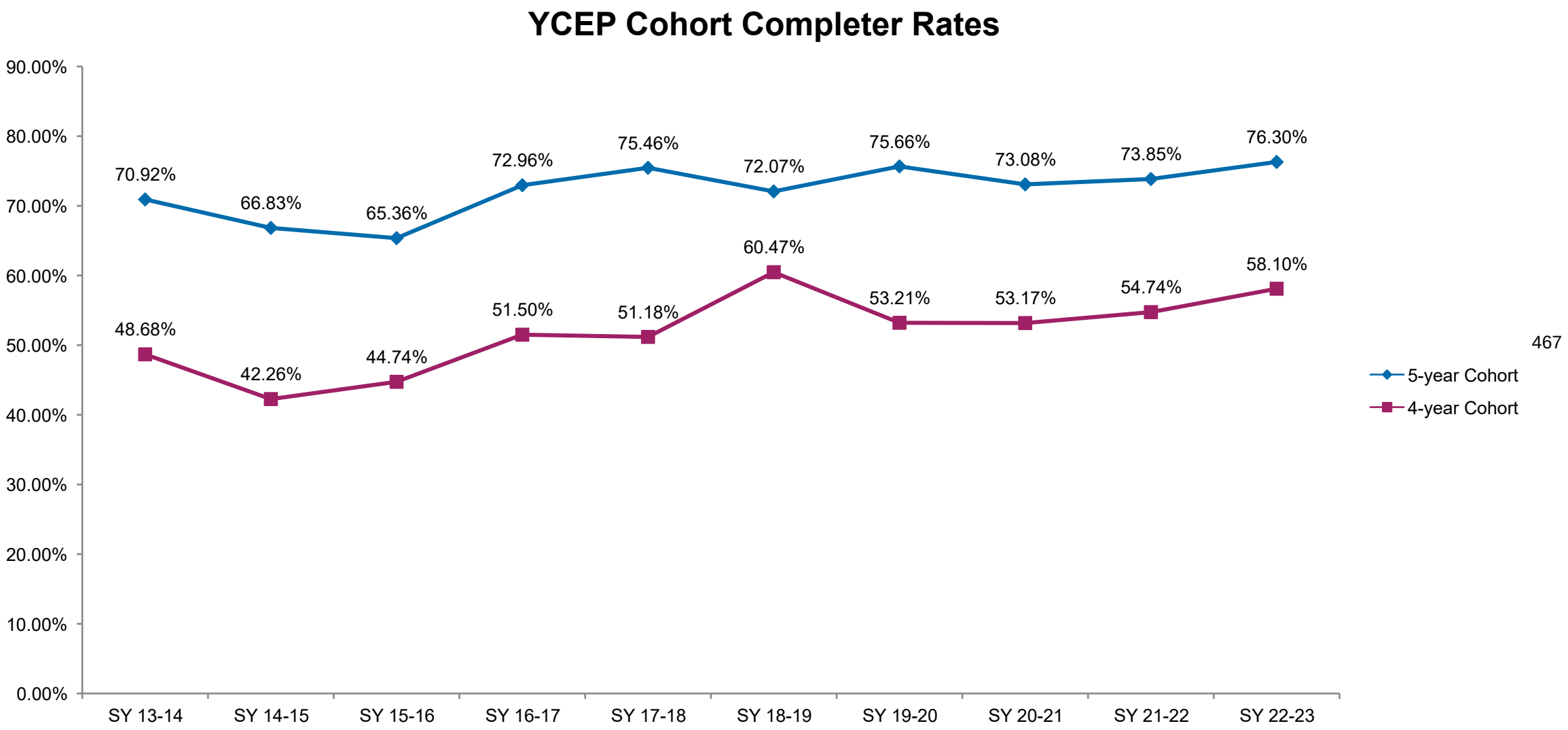
# Importance of Juvenile Corrections Education Funding

- Neighborhood Community K-12 High Schools accept academic credits earned and enroll students returning from juvenile justice, LTCT, and Hospital schools
- Decrease the number of dropouts and increase the number of high school completers
- Educational attainment reduces recidivism (Oregon data)
- Rand.org research

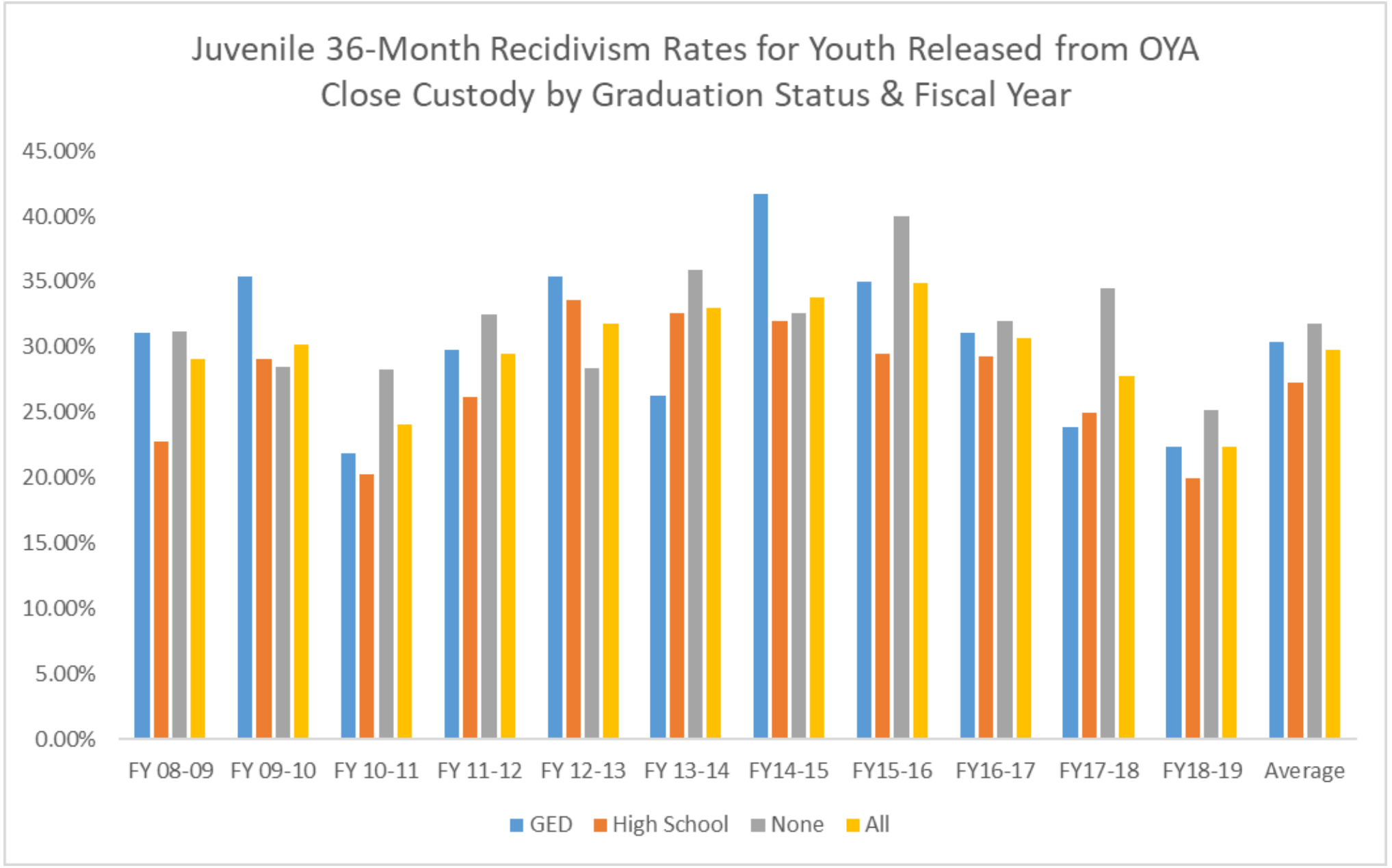
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  - "[A] recent report by the RAND Corporation … found that for every $1
  - investment in prison education programs, there is a $4-5 dollar reduction in
  - incarceration costs during the first three years post-release of a prisoner."
  - "study from the RAND Corporation incarcerated individuals who participated
  - in correctional education were 43 percent less likely to return to prison within
  - three years than prisoners who didn't participate in any correctional education programs."

# YCEP Cohort Completer Rates




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Juvenile 36-Month Recidivism Rates for Youth Released from OYA Close Custody by Graduation Status & Fiscal Year
45.00%
40.00%
35.00%
30.00%
25.00%
20.00%
15.00%
10.00%
5.00%
0.00%
FY 08-09
FY 09-10
FY 10-11
FY 11-12
FY 12-13
FY 13-14
FY14-15
FY15-16
FY16-17
FY17-18
FY18-19
Average
GED
High School
None
All

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# Juvenile Corrections Education Funding Model

**Subject:** Funding methodology for Juvenile Detention Education Program (JDEP) and Youth Corrections Education Program (YCEP)

**Concept:** ODE will codify the funding methodology for each JDEP school in county juvenile detention facilities and for each YCEP school in Oregon Youth Authority secure close custody facilities operated by school districts or education service districts.

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**Background:**

- Previously, each JDEP (1.5 ADMw) and YCEP (2.0 ADMw) school was funded on based on the legislatively mandated (ORS 327.026) per ADMw for each JDEP school and each YCEP school. HB 5014 (2023) provided continual General Funding of $8.3 million to be distributed to the JDEP schools and YCEP schools based on the five criteria listed in the Budget Note.

# Juvenile Corrections Education Funding Model

**Timeline:**

- In the 2023 Legislative session, the Legislature passed HB 5014 with the Governor signing the bill on July 27, 2023.
- In the month of August and September, ODE held internal meetings to deliberate on the HB 5014 Budget Note on the impact and implementation of the Budget Note.
- In the month of October 2023, ODE drafted OARs to codify the intent of the Budget Note.
- ODE engaged partner organizations in the subsequent months from November 2023 to April 2024.
- Hopefully, the draft OARs will complete the process for full adoption by the State Board of Education in the June 2024 meeting

# HB 5014 Budget Note

2. An ongoing General Fund appropriation of $8,336,000 is made for the Youth Corrections Education Program and the Juvenile Detention Education Program. Instructions to the Department are provided in the following budget note:

**Budget Note: YCEP/JDEP Funding Flexibility**

In order to provide administrative flexibility to address fluctuating enrollment and costs between Youth Corrections Education Programs (YCEP) and Juvenile Detention Education Programs (JDEP) during a biennium, the Department is directed to account for YCEP and JDEP funding as a single program. To determine funding distributions between YCEP and JDEP providers and programs, the Department shall consider:

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- The diversity of the population being served, including the number or percentage of youth from historically underserved populations;
- The characteristics of the facility including the number of classrooms in use;
- The number of students served in the program;
- The percentage of students qualifying for special education services; and
- The level of transition support offered by the provider.

HB 5014 A

9 of 20

# Juvenile Corrections Education Funding Model

- **Proposed New Rule OAR 581-015-2940 - Mirrors HB 5014 Budget Note**

**581-015-2940**

**Juvenile Corrections Education Funding Model**

(1) The Department of Education shall provide State School Funding to the Juvenile Detention Education Program (JDEP) based on anticipated Average Daily Membership times 1.5 ADMw for the school year.

(2) The Department of Education shall provide State School Funding to the Youth Corrections Education Programs (YCEP) based on anticipated Average Daily Membership times 2.0 ADMw for the school year.

(3) The Department of Education shall determine the number of classrooms to be funded at each JDEP and each YCEP school using the methodology of:

(a) a classroom for every 8 ADM for JDEP and YCEP schools with 48 ADM or below and

(b) An additional classroom for every 10 ADM above 48 ADM.

(c) Based on the cost of operating a JDEP or YCEP classroom, with input from stakeholders, the Department of Education will determine the level of funding per classroom.

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(4) Based on available funding, the Department of Education will fund each classroom.

(a) If the total state funding available for all JDEP and YCEP schools is less than the total state funding needed to fully fund each classroom, the amount of state funding for each classroom determined under paragraph (3) of this subsection will be prorated.

(5) Based on remaining available funding after the allocations for the classrooms have been determined and calculated, each JDEP school and each YCEP school may apply for funding based on the below criteria:

(a) The diversity of the student population being served, including the number or percentage of youth from historically underserved populations.

(b) The characteristics of the facility, including the number of classrooms in use.

(c) The number of students who are enrolled in the school.

(d) The percentage of students qualifying for special education services.

(e) The level of re-entry transition support offered by the educational provider.

(6) Oregon State Funding may be transferred between the JDEP and YCEP programs.

# Proposed Rule Impacts: Juvenile Corrections Education Funding Model

Racial Equity:

- *Unfortunately, a disproportionate number of students of color are detained in county juvenile detention facilities and incarcerated in Oregon Youth Authority secure close custody facilities. The increased financial investment of $8.3 million will provide increased educational and re-entry transition services to the students so that they will have the resources and assistance they need to attain a high school diploma or GED. In addition, two of the five criteria for funding specifically address diversity of the student population from underserved populations and the eligibility for Special Education services.* 473

Fiscal/Economic & Small Business Impact:

- *With the additional ongoing investment of General Fund allocation of $8.3 million, partnering school districts and education service districts that provide the educational services within the JDEP and YCEP programs will see an increase in funding to hire more staff, procure supplies and equipment, and to provide increased services to the students.*

# Juvenile Corrections Education Funding Model

**Engagement:**

- 9am, Nov. 3, 2023 – Statewide LTCT Quarterly Meeting
  - Partners from school districts, education service districts, Oregon Youth Authority, Oregon Department of Human Services, Oregon Health Authority, and mental health providers were invited to this meeting
- 11am, Nov. 14, 2023 - OYA meeting to discuss discuss draft OAR and SB 2275
  - Partners from the Oregon Youth Authority and county juvenile departments were invited to and participated in this meeting
- 9am, Nov. 15, 2023 - Joint JDEP/YCEP Meeting to discuss draft OAR and draft Re-entry Transition guidance document
  - Partners from school districts, education service districts, Oregon Youth Authority, county juvenile departments were invited to this meeting
- 1pm, Nov. 15, 2023 - Oregon Juvenile Department Directors Association (OJDDA) Monthly meeting - HB 5014 OAR engagement meeting
  - ODE presented the draft OARs at the monthly OJDDA meeting
- 1:30pm, March 20, 2024 - OJDDA Quarterly meeting
  - ODE presented in-person the draft OARs at the quarterly OJDDA meeting
- April 9, 2024 – Presented at the OYA Parent Advisory Council
- 9am, April 10, 2024 – Student engagement session with current YCEP students, many of whom were also former JDEP students
- All of the partners that participated thought that the proposed OARs effectively codified the Legislative intent.

# Juvenile Corrections Education Funding Model

**Follow-up Actions: Consider Feedback? State Board? Further engagement?**

- Consider and incorporate feedback
- April 2024: Present to the State Board of Education (First read)
- Continue with Engagement with current YCEP Students who were also JDEP students
- 6pm, April 24, 2024: Joint JDEP and YCEP Parent Engagement sessions
- 9am, April 25, 2024: Additional Engagement session with Educational Partners
- May 2, 2024: Present to ODE Rules Advisory Committee (Second presentation)
- June 13, 2024 Present to the State Board of Education, June 2024 (Second Read/Adoption)

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# Contact Information

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- Adam Henning, Adam.henning@ode.oregon.gov

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# Oregon State Board of Education
# April 18, 2024
AGENDA ITEM: Pending

| | |
|---|---|
| **SUBJECT:** Computer Science Education Statewide Implementation Plan<br>**STAFF NAME & OFFICE**: Andrew Cronk, Computer Science Education Specialist, Beth Blumenstein, Interim Director of Well-Rounded, Integrated & Digital Learning (WRIDL)<br><br>Update to the Board regarding progress implementing initial strategies in the recently released Computer Science Education Statewide Implementation Plan | ☒ **Informational Presentation**<br><br>☐ **Written Report** |

**BACKGROUND**

In May 2022, former Governor Kate Brown directed the Oregon Department of Education (ODE) and the Higher Education Coordinating Commission (HECC) to develop a statewide, long-term implementation plan "to provide access to comprehensive computer science education opportunities to every public school student in this state by the 2027-2028 school year." In her letter to ODE and HECC, she writes:

> *Racial, ethnic, and gender disparities in STEM education persist across the state, including gaps in access to computer science and related advanced placement courses…*
>
> *The results of these racial and gender disparities in access to STEM and computer science courses in public schools are clear…In summary, BIPOC, tribal, and female students have the least access to high-wage, high-demand careers requiring a STEM credential or diploma.*

In December 2023, following an extensive process of public engagement, ODE released the Computer Science Education Statewide Implementation Plan. The overarching goal of the plan is to broaden access, participation, and engagement in computer science education. With the advent of new technologies like generative AI and the impact of federal investment in the semiconductor industry through the CHIPS and Science ACT, a working knowledge of computer science should no longer be perceived as optional or elective. Computer science is foundational knowledge that should be available to all public school students across Oregon. The plan identified 7 outcomes to make computer science education foundational. These outcomes are:

1. Every Public School Offers Opportunities to Learn Computer Science
2. Systems are Established to Recruit, Prepare, Support and Retain Computer Science Teachers
3. Computer Science Education has Stable, Long-Term Funding
4. Computer Science is Recognized as a Content Area in Rule and Statute
5. High School Computer Science Education Aligns with Postsecondary Requirements
6. Computer Science Learning is Current, Relevant and Connected to Career Opportunities
7. Progress on Expanding Participation in and Access to Computer Science Education is Monitored and Reported

Along with each outcome, the plan describes supporting strategies, key considerations, measures of progress, a proposed timeline, and funding possibilities. The following strategies were identified as those that could commence during the period prior to the 2025-2027 biennium, when legislative direction might be available. Work on all the following strategies is currently underway.

**1.5** Communicate with K-12 school counselors and administrators about inclusive computer science course design
**1.6** Develop tools and resources to support schools and districts in expanding and improving equitable CS opportunities.
**2.4** Develop a computer science micro-credential to support the preparation of current educators
**4.1** Establish computer science as a content area by amending the related statutes and regulations
**4.2** Adopt K-12 content standards and CTE Knowledge and Skill Statements that integrate equity and culturally responsive computer science education throughout grade levels and courses
**4.4** Expand and review computer science and related instructional materials which are Open Educational Resources
**5.1** Incentivize enrollment in high school computer science courses or courses that integrate computer science concepts
**5.3** Review high school computer science course offerings and create a crosswalk with intro post-secondary CS courses
**6.2** Support the creation of regional advisory committees to support CTE programs
**7.1** Develop an ongoing evaluation process of computer science education that is reviewed by the State Board of Education
**7.2** Create public-facing data highlighting disaggregated enrollment in computer science classes statewide
**7.3** Establish a clear list of NCES course codes indicating which CS classes may be considered as foundational

In addition to the work in progress described in the implementation plan, there is another initiative underway to make computer science education foundational. The Well-Rounded Computer Science (WRCS) initiative is part of a five-year, $9.8 million federal grant that ODE received in 2020. ODE works closely with partners at the University of Oregon, Oregon State University, and Portland State University to achieve the following goals:

- Expand professional development for the Exploring Computer Science (ECS) program. Exploring Computer Science is a year-long, research-based, high school intro-level computer science curriculum that focuses on broadening participation in computing. It supports teachers and districts throughout implementation of the course regardless of school resources.
- Create guides and professional development workshops to inform and empower school administrators and counselors to expand computer science participation in their schools.
- Create a cadre of Regional Exploring Computer Science (ECS) Teacher Coordinators and a statewide Specialist to support and sustain equity focused strategies, district planning activities, classroom teachers, and recruitment for teacher professional development.
- Develop a statewide evaluation of the state of equity of participation and engagement in computing courses.

The work initiated by the Computer Science Education Statewide Implementation Plan parallels and complements the work supported by Well-Rounded Computer Science. In addition to the efforts

described above, a focus on expanding computer science learning opportunities at the elementary level is underway by exploring the addition of an elementary strand to the ECS professional development this summer.

**EQUITY IMPACT ANALYSIS**

The purpose of this work is to both broaden participation in computer science education and ensure that all students, especially those most historically and systemically excluded from this field of study, have access to computer science education. Diversifying participation occurs when teachers are equipped with culturally responsive-sustaining pedagogy for students and the ability to strengthen a sense of belonging for all students so that they can see themselves represented within the field (both within K-12 and beyond). In addition, it involves talking about how computer science has the potential to solve problems relevant to students' lives and future opportunities, including careers. Only through reaching beyond access to diversifying participation and increasing engagement can opportunities to create equity-based systemic change be realized.

The term, 'Preparatory Privilege', in the context of K-12 computer science education refers to the advantages some students have due to their prior exposure to computing concepts, resources, and support before entering formal computer science courses. These advantages can stem from a variety of factors, including socioeconomic status, access to technology at home, parental or community support for learning computing skills, and early educational opportunities such as coding camps, after-school programs, or schools with robust STEM curricula.

Students with preparatory privilege arrive in computer science classes with a foundational understanding of computing concepts, familiarity with programming languages, or experience in problem-solving through coding. This head start can significantly impact their confidence, engagement, and performance in computer science courses, contributing to disparities in achievement and participation among students with varying backgrounds. These inequities point to the need to think intentionally about how to create pathways for students beginning as early as pre-kindergarten.

The current landscape of computer science education[1] in Oregon shows that:

- Only about 60% of Oregon high schools offer computer science courses.
- Only about 1 in 4 students currently taking a computer science course are female-identifying.
- Significant disparities exist in computer science enrollment among Latino/a/x students, Multilingual Learners, and students with disabilities.
- Among graduates of the Class of 2022, only about 1 in 5 students took a computer science class at any time during middle or high school.
- According to Code.org 2023 State of Computer Science Education, Oregon lags behind other states in adopting policies that ensure all students have equitable access to computer science education and averages over 7,000 open computing positions per month.

As indicated by the initial directive and stated in Strategy 7.3, it is the intention of the Computer Science Initiative to make data regarding progress in broadening participation maximally transparent by providing the State Board of Education a regular report of the state of computer science education in

[1] Oregon Department of Education Administrative Data (2022)

Oregon. The first of such reports is expected to be prepared by the end of December 2024. An initial Computer Science Education Dashboard highlighting Oregon data is available through the ECEP Common Metric Project.

## POLICY ISSUE OR CONCERNS

Because Legislative action has not yet occurred to begin the process of developing computer science standards, there are no formal policy issues for the Board's consideration. However, the absence of computer science academic standards impedes potential progress in other areas of implementation, such as Strategy 2.4 which describes developing a "micro-credential". To address this area of concern, ODE is planning on developing draft, optional computer science standards in the interim to support educators until a more formal standards adoption process can be realized through Legislative action.

## FISCAL ANALYSIS

The efforts to implement initial strategies in the Computer Science Education Statewide Implementation Plan are supported through federal funds that expire in September 2024. The Well-Rounded Computer Science efforts are also supported through federal funds that expire in September 2025. Legislative direction will be required to address and sustain the most significant Outcomes and Strategies described in the implementation plan. For more details regarding funding computer science education in Oregon, please refer to the Funding Estimates section (page 30) of the Computer Science Education Statewide Implementation Plan.

## ATTACHMENTS

Computer Science Education Statewide Implementation Plan

# Computer Science Education Statewide Implementation Plan

## Informational Update
## State Board of Education



Oregon Department of Education (ODE)
Higher Education Coordinating Commission (HECC)

# Timeline Review

**Phase I Engagement**
Dec. 2022 - March 2023

- 550 Oregonians
- 18 engagement sessions
- Online Survey
- Over 1,500 responses & comments

**Consult Group**
March 2023 - July 2023

- 45 Members
- Student, teachers, community members, administrators, higher education representatives, and industry professionals

**Phase II Engagement**
May 2023 - August 2023

- 16 engagement sessions
- Approximately 150 participants

**Phase III Engagement**
November 2023

- Online public comment on draft of the plan
- Approximately 50 respondents

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# Why Computer Science Education?

**Computer science knowledge is foundational**



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Oregon Department of Education (ODE)
Higher Education Coordinating Commission (HECC)

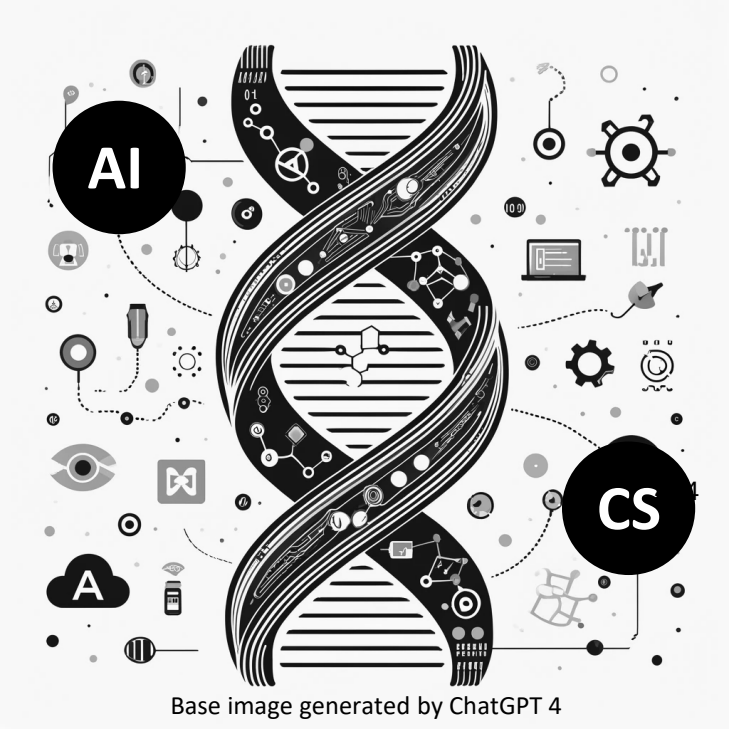
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# Computing and Artificial Intelligence

**“There is no AI education without an understanding of computing.”**

**“There is no CS education (today) without including engagement with AI.”**

- *Dr. Suchi Grover (Looking Glass Ventures/Stanford University) from ACM Special Interest Group on Computer Science Education (SIGCSE) presentation, March 2024, Portland OR*



Base image generated by ChatGPT 4

# Computer Science Career Pathways

**The study of computer science often affords access and opportunity to high-wage, high-demand careers.**




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From State of Computer Science Report 2023 Oregon Handout

Oregon Department of Education (ODE)
Higher Education Coordinating Commission (HECC)

# Computer Science Course Access and Participation

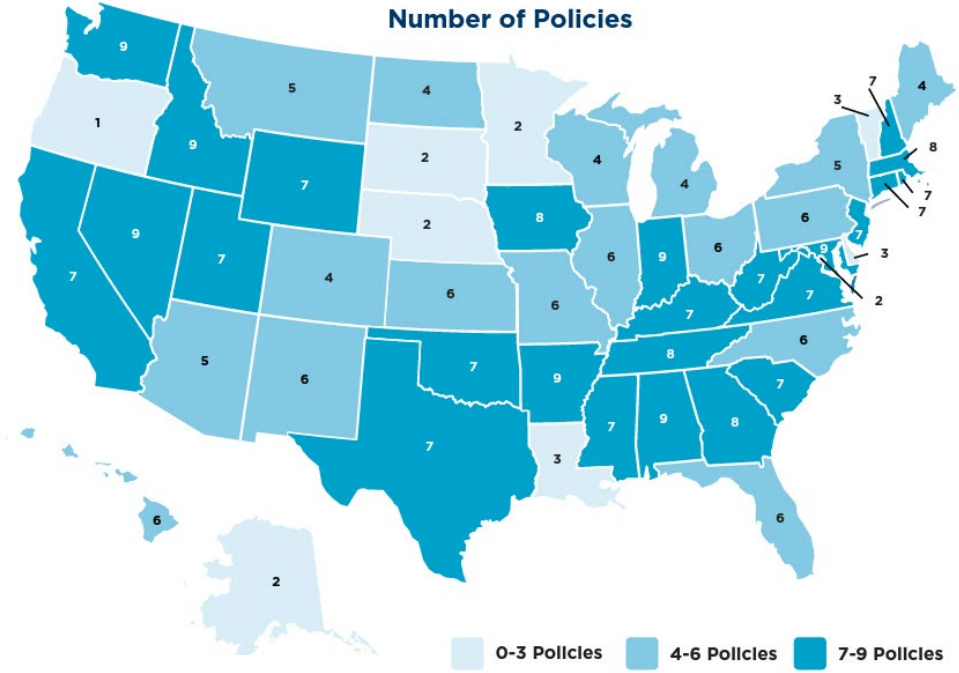
- **22%** of students in the Class of 2022 took a computer science course at some point during middle or high school.
- Currently fewer than **9%** of Oregon students participate in a computer science course.
- **60%** of high schools currently offer computer science courses.
- Systemic inequities continue to be seen through the persistent disparities in enrollment across gender, geography, race, language, and for students experiencing disabilities.

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Oregon Department of Education (ODE)
Higher Education Coordinating Commission (HECC)

Oregon Department of Education
Administrative Data (2022)

# Policy Adoption to Make CS Foundational



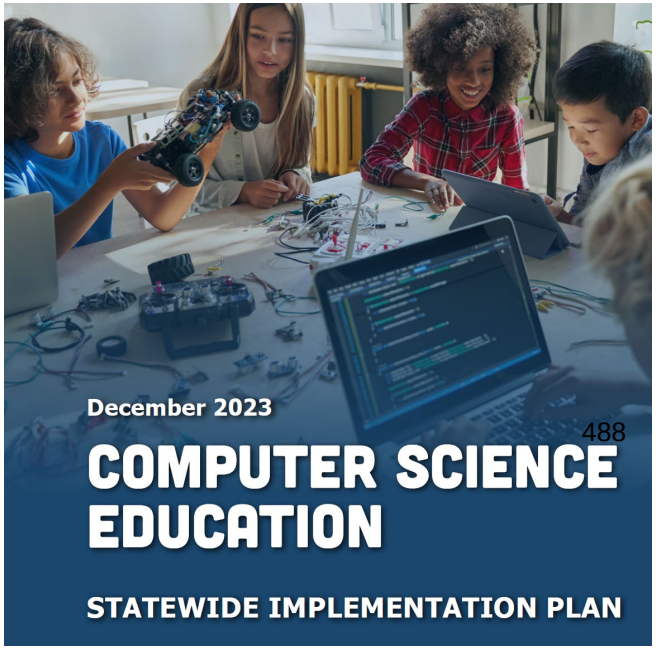

Oregon Department of Education (ODE)
Higher Education Coordinating Commission (HECC)

According to the 2022 State of Computer Science Education annual report, **Oregon ranks last in the nation** in the adoption of the 9 recommended policies to ensure access to and broaden participation in computer science.

**Washington, Idaho, Wyoming, Nevada, Utah and California** all have adopted the highest tier of these policies.

# Directive to ODE and HECC

- Computer Science education be available on an equitable basis
- Plan informed by national frameworks and standards
- Identify immediate, practical, and systemic changes
- Align with standards and curricula at colleges and public universities
- Include an ongoing evaluation process overseen by the State Board of Education




Final Release Dec. 2023

Oregon Department of Education (ODE)
Higher Education Coordinating Commission (HECC)

# Overarching Goal

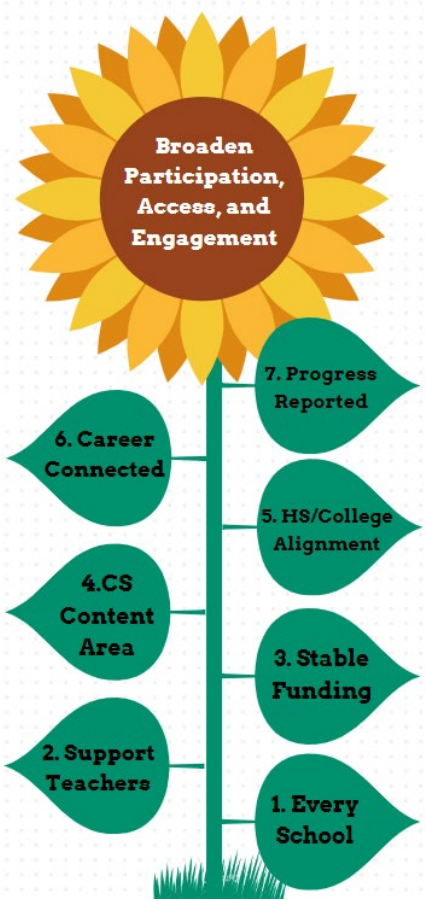



Click image above for link to plan.

**“The overarching goal of the computer science education statewide implementation plan is to broaden access, participation, and engagement in computer science education.”**

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Oregon Department of Education (ODE)
Higher Education Coordinating Commission (HECC)




# 7 Outcomes for Equitable Computer Science Education

1. Every Public School Offers Opportunities to Learn CS
2. Recruit, Prepare, Support and Retain CS Teachers
3. Establish Stable, Long-Term Funding
4. CS Recognized as a Content Area in Rule and Statute
5. CS Education Aligns with Postsecondary Requirements
6. CS Learning is Current, Relevant and Career-Connected
7. Progress is Monitored and Reported



Oregon Department of Education (ODE)
Higher Education Coordinating Commission (HECC)

# Implementation Plan Initial Work

## APPENDIX E – IMPLEMENTATION ROADMAP

The implementation of these strategies will require focused and coordinated efforts over many years. This table suggests a timeline for the many activities involved in achieving the goal of broadening computer science education statewide.

### Potential Timeline for Implementation of Strategies

Indicates a year where work on the strategy is in progress

Indicates the year where the strategy is expected to be fully implemented

**IMPLEMENTATION ROADMAP**

| Outcome #1: All Schools Offer Opportunities to Learn Computer Science | 2023 | 2024 | 2025 | 2026 | 2027 | 2028 |
|---|---|---|---|---|---|---|
| 1.1 Legislate and fund the statutory requirement that all elementary schools offer computer science and computational thinking experiences at all grade levels. | | | ↻ | ↻ | ✓ | |
| 1.2 Legislate and fund the statutory requirement that all secondary schools offer at least two computer science courses, one of which must be a foundational computer science course. | | | ↻ | ↻ | ↻ | ✓ |
| 1.3 Establish non-competitive grant funds specifically for small schools and schools in rural communities to engage in local projects related to computer science that emphasize equity and culturally responsive practices. | | | ↻ | ↻ | ✓ | |
| 1.4 Establish grant funds to reinforce and integrate with existing programs that support expanded learning opportunities inclusive of summer learning, after-school learning, and learning on school breaks. | | | ↻ | ↻ | ✓ | |
| 1.5 Communicate with K-12 school counselors and administrators and engage in statewide professional development about inclusive computer science course design, offerings, and recruitment to computer science education. | ↻ | ↻ | ✓ | | | |
| 1.6 Develop tools and resources to support schools and districts in expanding and improving equitable computer science opportunities. | ↻ | ✓ | | | | |

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HIGHER EDUCATION COORDINATING COMMISSION

OREGON DEPARTMENT OF EDUCATION

*Oregon achieves . . . together!*

# WRCS Keys Initiatives

- Expand the **Exploring Computer Science** (ECS) class
- Inform and empower **school administrators and counselors** to support computer science learning
- Create of a cadre of Regional Exploring Computer Science (ECS) **teacher mentors**
- Collect data to ensure **continuous and systemic improvement**




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Well-Rounded CS
WRCS 1-pager

# Strategies 1.1 & 1.2 Ensuring Access and 1.5 Supporting Counselors & Administrators

Exploring Computer Science

**Summer Equity Symposium**

OSU-Cascades
Bend, Oregon
July 29 - August 2, 2024

SUMMER EQUITY SYMPOSIUM

https://csfororegon.org/summerOfCS

- Elementary Level: Computational Thinking
- Secondary Level: Foundational CS Learning
- Counselor and Administrator Professional Development

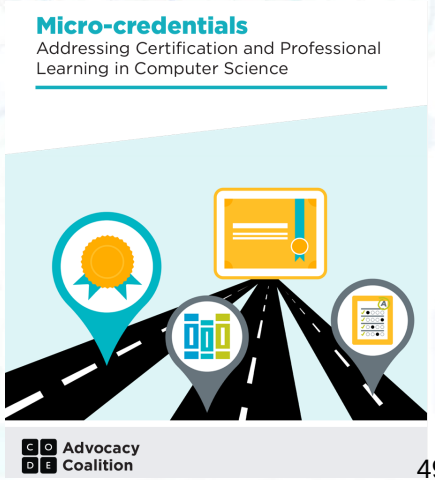


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# Strategy 2.4 Micro-credential

"Micro-credentials provide a pathway that recognizes teachers' existing skills and prior experience and do not require the teacher to spend hours in traditional models of professional learning or academic coursework."




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- *Micro-credentials Addressing Certification and Professional Learning in Computer Science, Code.org Policy Paper*

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# Strategy 4.1 CS as a Content Area

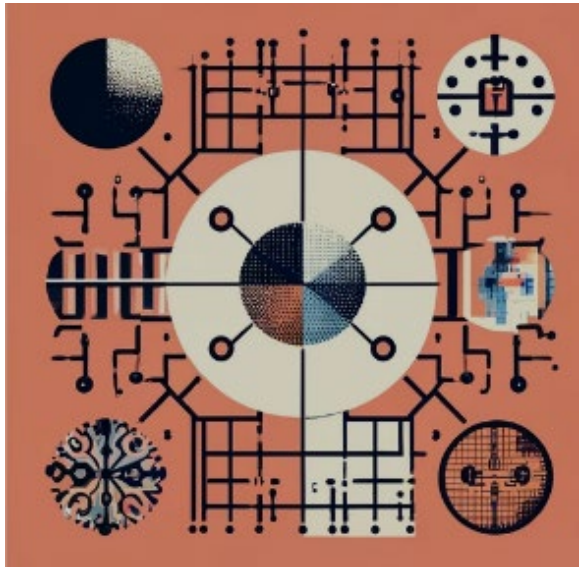
- Create content standards
- Adopt high-quality materials
- Develop pre-service teacher training programs



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Base image generated by ChatGPT 4

# Developing Optional Standards



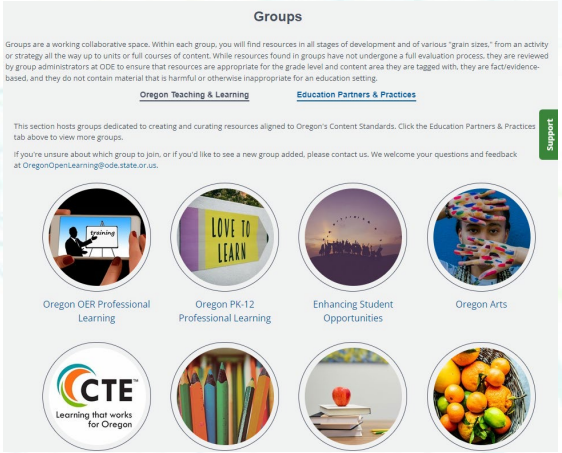
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- Significant need to move forward with developing optional standards.
- Work can proceed this spring to develop CS standards prior to legislative direction.

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# Strategy 4.4 Oregon Open Learning



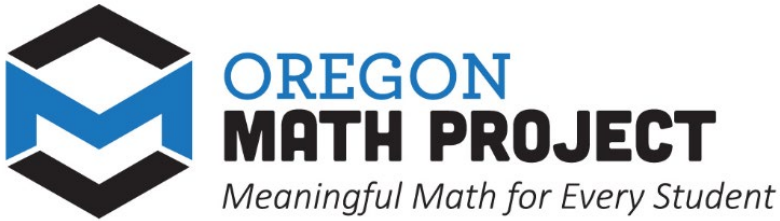

- Readily available materials
- Coming Soon! Oregon Computer Science Group

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# Strategy 5.1 Integrated Courses

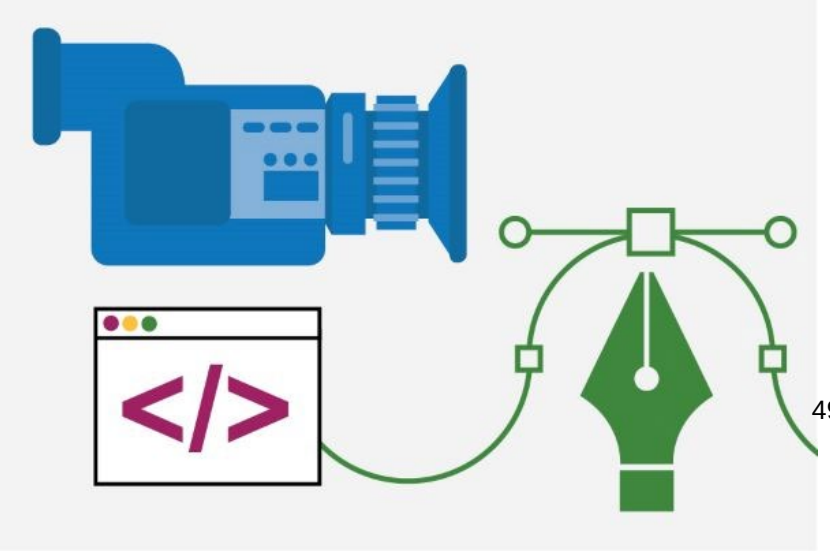
- Options for secondary schools to offer two CS classes
- CS + Math Class: 2+1 Model




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# Strategies 5.3 & 6.2 Crosswalk & CTE

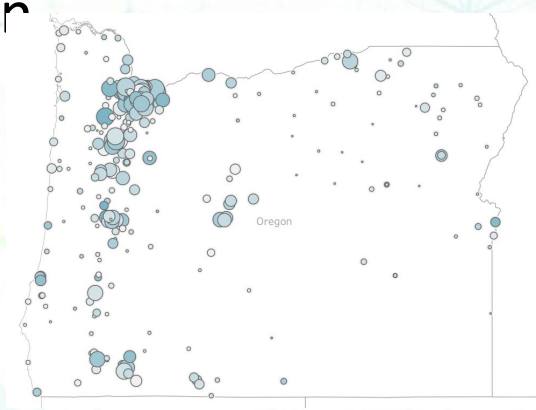
- Crosswalk high school courses to introductory CS courses
- Create state-level CTE advisory committees



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# Strategies 7.1 & 7.2 Progress Monitoring

- Common Metrics Project (CMP) Oregon CS Ed Data Dashboard
- WRCS Foundational CS Data Snapshots
- Template for State of Computer Science Report for State Board of Educatior




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# Thank you!

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