THE OREGON STATE BOARD OF EDUCATION

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

AGENDA
Regular Meeting
Public Service Building 251 A/B
255 Capitol Street NE
Salem, OR 97310
Thursday, June 13, 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: 9:05 AM*
   - B. **Board Member Reports**
   - *Time: 9:10 AM*
2. **Executive Session**

Time: 10:00 AM

A. In accordance with ORS 192.660(2)(f), the Board will hold an executive session to consider information or records that are exempt by law from public inspection.

3. **Public Comment**

Time: 11:00 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. 4

4. **Consent Agenda**

Time: 11:30 AM

A. Administration of Medication: OAR 581-021-0037 14
B. Correction Education Funding Model: OAR 581-015-2940 32
C. Senate Bill 283 (2023) and Senate Bill 1552 (2024) Implementation: Mentorship Grant Program Administrative Rules Revision: OAR 581-018-0130 - 581-018-0151 36
D. House Bill 2696 (2023) Implementation: Sign Language Interpreter Rulemaking: OAR 581-015-2035 59
E. Senate Bill 758 Implementation: OAR 581-015-2300 and 581-015-2340 66
F. Essential Skills Assessments for English Language Learners (ELL) Technical Fix: OAR 581-022-2120 71
G. House Bill 2281 (2023) Implementation: Civil Rights Coordinators Technical Fix: Temporary Rules 75

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H. 2024 Draft Social Science K-12 Standards 88
I. Higher Education and Career Path Skills Standards and Personal Financial Education Standards 189
J. Substitution Requests for Instructional Materials 226
K. Eagle Charter School Expansion Request 244
L. Transportation Supplemental Plan: Eugene 4J 270
M. Transportation Supplemental Plan: Bend-La Pine Schools 361
N. Transportation Supplemental Plan: Ontario School District 368
O. 2024-2025 Board Leadership Nominations 387
P. 2024-2025 Board Calendar 390

5. **Adoptions**
A. Charter School Waiver Request: Helix Charter School 391
Time: 11:35 AM
Kate Pattison, Office of the Director and Brad Bixler, Superintendent, Helix School District
B. Policies and Procedures Updates 412
Time: 11:50 AM

6. **Break for Lunch**

7. **Adoptions (continued)**
A. Senate Bill 3 (2023) Implementation 418
Time: 1:00 PM
Beth Wigham, Aujalee Moore, and Alexa Pearson, Office of Teaching, Learning, and Assessment
B. Native Hawaiian/Pacific Islander Student Success Plan Grant Program: OAR 581-017-0850 - 581-017-0875 468
Time: 1:45 PM
Carol Matsuzaki and Deb Lange, Office of Equity, Diversity, and Inclusion
C. Immigrant and Refugee Student Success Plan Grant Program: Temporary Rules 488
Time: 2:00 PM
Susy Mekarski and Deb Lange, Office of Equity, Diversity, and Inclusion
D. House Bill 4084 Implementation: Pilot Grant to Improve Educational Outcomes of Foster Care Students: Temporary Rules 518
Time: 2:15 PM
Marlie Magill and Vanessa Martinez, Office of Teaching, Learning, and Assessment

8. **Informational Reports**
A. Seal of Biliteracy Update 524
Time: 2:30 PM
Ben Wolcott, Office of Research, Assessment, Data, Accountability, and Reporting and Jennifer Fontana, Office of Teaching, Learning, and Assessment
B. Early Learning Transition Check-In: A Collaborative Engagement with Community Update 525
Time: 2:45 PM
Sody Fearn, Corine Tyler, and Andrea Lockard, Office of Research, Assessment, Data, Accountability, and Reporting
C. Students Experiencing Poverty Update 548
Time: 3:05 PM

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Dan Farley, Stephanie Evers, and Jon Wiens, Office of Research, Assessment, Data, Accountability, and Reporting

9. **Director's Report**

Time: 3:20 PM

10. **Adjourn**

Time: 3:45 PM

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Financial and Economic Knowledge for Life

Educating Today, Shaping Tomorrow

May 30, 2024

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

RE: Implementation of Senate Bill 3

Chair Martinez Zapata, Vice Chair Scurlock, Second Vice Chair Montgomery and Members of the Board: On behalf of the Council for Economic Education (CEE), I am writing to celebrate Oregon's passage of Senate Bill 3, that will improve the financial future of all Oregon students, and to thank you for your quick work in preparing for the implementation of this important course. CEE's mission is to equip K-12 students with the tools and knowledge of personal finance and economics so that they can make better decisions for themselves, their families, and their communities. We were happy to provide support to Oregon leaders in the passage of the Senate Bill 3 and remain dedicated to ensuring the legislation is properly implemented and that teachers have the professional development and resources necessary to teach the course.

Senate Bill 3 represented a huge step forward for Oregon students. The legislation clearly requires "one half-credit of personal finance education" while allowing for the necessary flexibility for schools to implement this new requirement. By allowing the course to count as one half-credit of the existing math requirement, this bill allows for schools to rework their curriculum as necessary to meet the new requirements laid out in Senate Bill 3.

These flexibilities, however, are not a license to water down the important coursework as laid out in the legislation. In the SB 3 Potential New Draft Rules Language (Option A), we are concerned that some schools and districts may choose to continue to fall short of meeting the requirement as laid out clearly in the legislation by integrating personal finance concepts into other coursework given the stipulation that "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." This would allow districts to fall short of meeting the legislative mandate of a semester-long course in personal finance.

The research is clear that a stand-alone semester of personal finance is the best way to ensure that students graduate from high school prepared. Research shows that students who receive education in personal finance make better financial decisions. They have improved credit scores, reduced default rates, and are less likely to have outstanding debt[1]. Three years after a state-mandated course in personal finance was instituted in three states, severe delinquency on credit accounts or auto loans decreased as much as 32 percent and credit scores improved from as much as 5.2 percent[2]. Students

[1] https://users.ssc.wisc.edu/~jmcollin/wp/wp-content/uploads/2015/05/FinEdState_Collins.pdf
[2] https://www.federalreserve.gov/pubs/feds/2014/201468/201468pap.pdf

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who choose to pursue postsecondary education make better choices, borrowing more knowledgably and taking lower-interest loans[3]. This effect is even more pronounced for students from low-to-moderate income families.

Thank you again for working to ensure that all Oregon students receive the highest quality of education available, personal finance and otherwise. We hope you hold true to the intent of the law and retain its requirement for all students to take one semester of personal finance. We are excited for future Oregonian students who will graduate from high school better equipped with the knowledge of personal finance so that they can make better decisions for themselves, their families, and their communities. Please consider the Council for Economic Education a resource and partner in building this new future for Oregonians.

Sincerely,



Nan J. Morrison
President & CEO
Council for Economic Education

[3] https://www.bostonfed.org/publications/communities-and-banking/2014/spring/making-smarter-decisions-about-higher-education.aspx

May 21, 2024

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

Dear Board Members,

Senate Bill 3[1], a landmark piece of career path skills and financial literacy legislation that was passed during the 2023 Legislative Session, represents a significant step forward in equipping Oregon students with the knowledge and skills necessary to navigate the complexities of personal finance in today's world.

Financial literacy is an essential component of overall well-being and success, yet it is a topic that is often overlooked in traditional education systems. Senate Bill 3 was passed to address this gap by implementing comprehensive financial education programs in schools across our state. By prioritizing financial literacy in Oregon schools, we are empowering our students to make informed decisions about money management, budgeting, saving, investing, and more.

We are writing to you today to emphasize the critical importance that Senate Bill 3 be implemented as intended by the legislators who introduced it. This means a stand-alone course offering a comprehensive semester of financial education instruction, *not* integrating the new requirements into existing courses.

Legislative Counsel, when asked for an opinion on the enacted text and the legislative intent presented when the bill was being considered, came to the following conclusion:

"[Our] interpretation of subsection (2)(d) is 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. In other words, the subject matter of the new credit requirements would be the foundation of a course, but the course could satisfy other credit requirements (such as a math credit). [We] believe 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."

[1] SB3 2023 Regular Session - Oregon Legislative Information System (oregonlegislature.gov)

As the state education department's governmental relations director said in testimony[2] before the Senate Education Committee last year, "It is clear that financial literacy courses are most successful when offered as stand-alone courses."

Legislative intent should serve as a foundational principle in the Board's rulemaking process, guiding regulators in creating regulations that are consistent, effective, and aligned with the goals of the laws they are implementing. We hope you would agree that when regulations reflect legislative intent, they are more likely to be effective in achieving their intended outcomes.

We believe the Legislature will continue to prioritize financial education and support even more initiatives like Senate Bill 3 in the future. By investing in the financial literacy of our students, we are investing in the future prosperity of our state. We urge you to move forward in your rulemaking process in a way that honors legislative intent, a safeguard against regulatory overreach, preventing arbitrary rulemaking that goes beyond the scope of the law.

Respectfully,

Kim Thatcher
State Senator, District 11

Suzanne Weber
Vice-Chair, Senate Education Committee
State Senator, District 16

David Brock Smith
State Senator, District 1

Dick Anderson
State Senator, District 5

Boomer Wright
Vice-Chair, House Education Committee
State Representative, District 9

Tracy Cramer
State Representative, District 22

Mark Owens
State Representative, District 60

[2] Follow Up - ODE Senate Education 2.28.23 (oregonlegislature.gov)

From: Ted Scheinman
To: StateBoard Public Email
Subject: Economic Educator input for SB3
Date: Tuesday, June 11, 2024 1:54:25 PM

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As a Board Member of the Oregon Council on Economic Education and Economics Instructor at Mt. Hood Community College and Lewis & Clark College for more than 50 years, I wish to comment about the potential elimination of a stand-alone personal finance class from the graduation requirements under SB3.

Oregon was known almost 40 years ago as the first state in the country to require a course in economics/personal finance as a graduation requirement. With this graduation requirement as a guide, the Oregon Council on Economic Education conducted teacher training for nearly 500 teachers a year, placing Oregon in the national spotlight. When the legislature eliminated this requirement in the 1990s under Norma Paulus, it was with the promise that standards would be a more effective tool for providing education about personal finance and economics - it was said that integration was best. This decision, one of the worst education decisions made by the Oregon Legislature, led to a reduction in personal finance/economic literacy in Oregon according to national rankings.

Our Oregon students deserve better! It is more efficient to have a stand-alone course in personal finance/economics than to attempt to integrate the concepts in various classes, where teachers do not have the incentive to invest in the class. To have an effective tool for teaching personal finance requires considerable knowledge, based on research on what needs to be taught and how to teach it.

Therefore, I **strongly support rules under SB3 requiring a stand-alone personal finance class as a graduation requirement.**

Ted Scheinman, Instructor in Economics
Oregon Council on Economic Education
Mt. Hood Community College

June 13, 2024

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

On behalf of the Oregon Education Association, the Coalition of Oregon School Administrators, East Multnomah County Schools, the Oregon School Board Association and our respective members, we submit this letter regarding Agenda Item 7A – Senate Bill 3 (2023) Implementation – related to Personal Finance Education and Higher Education and Career Path Skills.

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

To maintain continuity, clarity and consistency for students, educators, and staff, **we strongly recommend that the State Board of Education adopt Option 1: Flexible Integration in the proposed rules.** This option most closely aligns with public comment on these rules, the extensive community engagement done through the 2022 Community-Informed Recommendations for Equitable Graduation Outcomes report, and current practice in Oregon for all other content standards.

First and foremost, our collective members have supported the addition of strong personal finance education and higher education and career path skills. We also support the overall recommendations from the 2022 report, which included the following themes:

- Oregonians have a shared value of flexibility.
- A one-size-fits-all approach to education is a barrier to student success.
- Students need more options to demonstrate mastery of content and to earn credit in multiple ways.
- Flexible access to courses is needed for student success.

Option 1: Flexible Integration provides students multiple pathways to demonstrate proficiency in the Personal Finance Education and Higher Education and Career Path Skills content standards and mirrors existing rules and practice for all other content standards in Oregon. This flexibility is what the community has asked for and most closely mirrors the voices of Oregonians who have shared their lived experiences in schools and classrooms with decision and policy makers. This option allows for both content standards

to be integrated into other content area courses and vice versa, and option allowable for all other content standards through Oregon's innovative Options for Awarding Credit rules.

Across schools in Oregon, there is a breadth and range of current course offerings and credit options that students could engage in to show proficiency and earn credit in these content standards.

For example:

- Economics course fulfilling a personal finance credit – and vice versa
- CTE courses such as business or accounting fulfilling a personal finance credit – and vice versa
- A capstone project, course or portfolio that fulfills a higher education and career path skills credit

Our organizations share many concerns about Options 2 and 3 as outlined in the proposed rules. Primary in those concerns is the way these options create different requirements in practice for these content standards and the subsequent costs to schools and students. There may be financial considerations as schools must prepare and build two new standalone courses in a short time frame. Additionally, students may lose out on elective credits or opportunities for interdisciplinary learning to align with their interests.

Additionally, we have concerns about how one-way integration may impact the education workforce. Oregon has acknowledged through legislation, research, and general consensus that we are facing an educator workforce shortage that is felt more acutely in small and rural areas. One-way integration limits a school district's ability to respond to current conditions including available workforce, student interests and goals, and community supports.

Lastly, we continue to be concerned about various stand-alone and piecemeal efforts to amend and change Oregon's graduation requirements. These approaches can have long-standing unintended consequences for students, educators, families, and communities that further exacerbate the concerns these groups have already raised in the 2022 report and beyond.

We urge the State Board to adopt Option 1: Flexible Integration and allow for a two-way integration model for both Personal Finance Education and Higher Education and Career Path Skills. Option 1 honors the input from stakeholders to increase flexibility for students, add more options for students to demonstrate mastery, and to bring more interdisciplinary learning opportunities.

Thank you for your time, your service, and your consideration.

Morgan Allen, Coalition of Oregon School Administrators
Andrea Barnum, Oregon Education Association
Stacy Michelson, East Multnomah County Schools
Efren Zamudio, Oregon School Boards Association

From: Catherine Caudle
To: StateBoard Public Email
Subject: Outcomes
Date: Thursday, June 6, 2024 5:11:33 PM

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

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

Good day,

In the 80's the school districts lost funding due to the sudden hit to the Oregon economy from timber sales. Growing up in Oregon and attending only Oregon schools I felt confident sending my children to public schools. Now my grandchildren have been attending those same schools.

There were many hands on classes back in the day and it looks like schools are heading back to that. Oregon schools were ranked high across the nation when I attended as they were when mother and all my aunts and uncles attended. I have witnessed the decline of my grandchildren education in science, math, and writing. Three of my four adult children have chosen to place their children in private schools and proclaim that the public schools are failing their children. The one adult son who kept his kids in public school has a dropout at 16 and three more behind her.

I began noticing the changes when our youngest child, now 28, began middle school and graduated from high school in 2013. She was against anything government and unable to properly explain anything becoming angry whenever someone disagreed with her. This same attitude is now being seen across our nation. She needed remedial math and writing to begin college, but then quit college because well people didn't agree with her.

While reviewing state statute I ran across one that states your agency "shall furnish the schools with supplies, equipment, apparatus, and services essential to meeting the requirements of a standard school" (see ORS 332.155)

Under the same law it allows school districts to lease or work with community colleges and other school districts or even enter into transactions to reduce the cost to a district for school facilities. Based on the outcome of school districts last round of bond measures it's clear we are done throwing money and seeing nothing from it.

Money is not the issue as Oregon has the lowest calendar school days in the nation but pays near the top to educate its youth. It's time to increase the school calendar, get back to basics, use all the resources of our great state and our village mentality to turn this black eye around. We need to add those days back on the calendar and get back to the basics building a foundation first then stacking the levels on top of that knowledge.

It needs to start with your office supplying ALL supplies for that education to include the teachers classroom lists as the law requires the state to simply supply these items for each student not send lists home. Students shouldn't be sent out to fund raise this needs to stop as the law is clear if the schools need the items your office is required to cover it.

Sincerely,

Catherine Caudle
Family Ford Scholar
Sent from my iPad

Oregon Business Education Association

June 13, 2024

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

On behalf of the Oregon Business Education Association's members, we submit a letter addressing Agenda Item 7A—Senate Bill 3 (2023) Implementation—related to Personal Finance Education and Higher Education and Career Path Skills.

We strongly recommend the State Board of Education follow the intent of Senate Bill 3, and adopt Option 3. The research is strong and clear that these content areas should be stand-alone courses. Financial education is most effective and appropriate to serve ALL students when delivered and studied in a stand-alone course and not embedded through other content areas or courses.

Some of the courses we teach—Accounting, Economics, and other Career Technical classes—are **NOT** personal finance courses; they are very different classes and applications. Personal Finance standards would not receive the time and focus necessary for the quality of education needed as intended by SB3. Simply adding financial verbiage to lessons, does not equate to educating students about the fast-changing and critical content of this course. Many business teachers served on the standards committee and repeatedly provided this information to the leads of this project. The stand-alone Personal Finance course we offer **DOES** meet the standards, and we are willing to help train others to implement a personal finance course properly. The business educators of Oregon have advocated for the proper return of Personal Financial Literacy since its removal of a graduation requirement in 1998. We support the implementation of Senate Bill 3 as intended but **do not** support these standards embedded in other courses as that is what we are currently doing and would be a non-actions by ODE.

We thank the Oregon and National Councils on Economics Education, NEFE, and other national expert leaders (Take Charge Today, NGPF, and more) in supporting the intent of SB3 and its intent to serve the youth of Oregon and to provide them with a strong financial foundation to serve their communities, regions, and our state.

Thank you for your time and your service.

Kim Bezdek, President-Elect
Joey Running, Past President

Oregon State Board of Education
June 13, 2024
AGENDA ITEM: 4.A.

SUBJECT: OAR 581-021-0037: Administration of Medication **STAFF NAME & OFFICE**: Tenneal Wetherall, Chief of Staff, ODE Ely Sanders, School Health Services Specialist, Office of Enhancing Student Opportunities 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. ☒Amend Existing Rule	☒ **Second Reading** ☐ **Action Seeking adoption**

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

- 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).

- 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.

- 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?

☐ Yes – As follows: Based on district engagement we dded statute language regarding sunscreen:

(8) District shall allow the application of and use by students of nonprescription sunscreen, including sunscreen that contains para-aminobenzoic acid, without any required documentation from a licensed health care professional per ORS 339.874.

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	
Policy Issue or Concern Raised	***Action on Feedback Received***
Definitions: 1. Add definition of "delegation" to differentiate medication administration done as part of nurse delegation. 2. Add definition of "district" to clarify that the OAR requirements pertain to school districts, ESDs, and public charter schools.	**Addressed in Rule** • Adjusted draft rule to include definitions of both 'delegation" and "district" consistent with input received. • 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.*

Staff supports • 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** • 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* • 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 • 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. • Additional feedback noted the importance of future guidance related to implementation of district stock medication programs	**Addressed in Rule and Guidance** • 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. • 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 • Initial feedback included concerns that OAR 581-021-0037 referenced minor consent statutes that were not applicable to medication administration in a school setting. • Feedback on the draft rule noted concerns related to the removal of referenced statutes and the ability for minors to consent to medication administration. • 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** • Removed reference to minor consent in draft rule.

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

☐ **Recommendation:** Adopt changes as provided ☒ ☐

Oregon State Board of Education
June 13, 2024
AGENDA ITEM: 4.A.

Prompted by: ☐ State law changes and from district and public engagements

ATTACHMENTS

Attachment 1: Draft OAR 581-021-0037: Administration of Medication to Students

OAR 581-022-2220

OAR 581-21-0037 **Draft update**

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.

(D~~C~~) 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:

(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;~~.~~ and~~It 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 schooldistrict-sponsored activity, while under the supervision of school personnel, andor in transit to or from school or schooldistrict-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

(iC) 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.

(de) 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; orof 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 tThe 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.

(fe) Include procedures for the administration of premeasured doses of epinephrine by schooltrained district personnel to any student or other individual on schooldistrict 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;

(g~~f~~) Include procedures for the administration of medication by district~~school~~ 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, o~~O~~nly 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 ~~school~~district personnel to be responsible for administering medication to treat adrenal insufficiency in the event the student exhibits symptoms that ~~school~~district 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 district~~school~~ 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.~~

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) District shall allow the application of and use by students of nonprescription sunscreen, including sunscreen that contains para-aminobenzoic acid, without any required documentation from a licensed health care professional per ORS 339.874.

(9~~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

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
June 13, 2024
AGENDA ITEM: 4.B.

SUBJECT: Title of topic/OAR # and Title Juvenile Corrections Education Funding OAR 581-015-2940 **STAFF NAME & OFFICE**: Sam Ko, Office of Enhancing Student Opportunities 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. ☒ New Rule ☐ Amend Existing Rule ☐ Repeal Rule	☐ **First Reading** ☐ **Presentation** ☐ **No Presentation** ☒ **Action** ☐ **Temp Rule** ☐ **Presentation** ☒ **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 been brought before the State Board of Education on May 18, 2024 as a 1st Read agenda item..

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, the only question and concerns were about the implementation of the recently passed SB 1552 (2024) and expansion of the ODE Long Term Care and Treatment (LTCT) program to include additional eligible day and residential treatment programs.

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.

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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: 24April draft OAR Juvenile Corrections Educational Funding model

TO: Educator Advancement Council
FROM: Staff
RE: Senate Bill 283 Mentorship Program
Date: March 27, 2024

This memo provides a summary on progress made in implementing the SB 283 Mentorship Program, and identifies needed next steps, including a vote by the Council to approve a draft of revisions to the administrative rules. Due to the short timeframe for implementation, as well as limited capacity of current staff to undertake this project, the approach to implementation is one that meets the requirements of the law while upholding the values of the EAC and responding to current needs and constraints impacting the field. It also creates opportunities for conducting an in-depth study of current mentoring practices, identifying system needs and opportunities, and engaging practitioners in shaping the state's standards for mentorship programs and practices.

Summary of SB 283 Mentorship Program for the 2024-2025 School Year

Senate Bill 283 (2023) amends statutes relating to Oregon's beginning educator mentorship program and provides $8 million one-time grant dollars to support local and regional mentorship programs that pair experienced educators with beginning teachers and administrators. The bill directs the EAC to:

- Administer the grant program, including receiving and evaluating applications, distributing grant funds, determining penalties.
- Define established best practice and research-based criteria for selection of mentors.
- Identify criteria for approving training for mentors and beginning teachers and administrators.
- Ensure mentors receive training that is provided or approved by the EAC.
- Conduct regular and ongoing evaluation of implementation and administration of the program.

The grant program will include the following components:

- Non-competitive grants (authorized by SB 1552 (2024)) to districts and Regional Educator Networks based on an application for funding to support training and stipends for mentors in 2024-25 academic year.
    - Grant awards based on the number of beginning teachers and administrators participating in the program (expected to be between $1,500 and $5,000 per beginning educator).
    - Grants are intended to prioritize the continuation of existing mentoring relationships serving beginning teachers and administrators and those who hold an endorsement related to special education, who serve in school districts in rural areas, who are diverse, as defined in ORS 342.433, and who hold an emergency teaching license.
- Communities of Practice for program and district staff supports learning and development of high quality mentorship programs and mentoring practices.
- Statewide mentorship study to evaluate the current landscape of mentoring program practices, identify needs and opportunities, and inform development of state standards.

During the 2024-2025 year, technical assistance and evaluation partners will work with grantees to study and gather input from the field to inform updates to Oregon Mentoring Program standards to ensure alignment with educator needs and current research on effective mentoring practices.

Mentorship Program Administrative Rules

Oregon law defines "rule" as "any agency directive, standard, regulation or statement of general applicability that implements, interprets or prescribes law or policy, or describes the procedure or practice requirements of any agency." ORS 183.310(9). Agencies may adopt, amend, repeal or renumber rules, permanently or temporarily (up to 180 days), using the procedures outlined in the Oregon Attorney General's Administrative Law Manual. The State Board of Education, Teacher Standards and Practices Commission, and Higher Education Coordinating Commission can adopt rules on behalf of the EAC.

The State Board of Education adopted Oregon Administrative Rules 581-018-0130 through 581-018-0151 for the Oregon Beginning Teacher and Administrator Mentorship Program, with most recent updates made in 2019. The attached revisions propose changes to the existing rules that align with the bills passed in 2023 and 2024. With the Council's approval, the revisions will be presented to the State Board of Education for adoption and filing with the Secretary of State.

The following summarizes the revisions made to the rules:

- Adds "educator networks" as defined in ORS 342.943 to eligible grant recipients (SB 283).
- Updates the role of ODE and EAC in administering the program (SB 283).
- Clarifies that for the 2023-2025 biennium, beginning teachers with a provisional license (Emergency or Restricted Licenses) may be supported with grant funds (SB 283).
- Defines rural districts; clarifies application requirements (SB 283).
- Allows noncompetitive awarding of grants in the 2023-2025 biennium (SB 1552).

On April 3, 2024 the Council will be asked to vote on approving the draft revised administrative rules. The Council's vote will indicate their approval of the revised administrative rules, which will then be brought to the State Board of Education for consideration in April and adoption in June. The adopted rules will then be filed with the Secretary of State. If the rules are not approved by the Council in April, the Council will vote in June and the same steps will be followed.

Mentorship Program Grant Guidance and Application Next Steps

To aid in information sharing about this grant opportunity, requirements, application and distribution processes, staff have created two documents that will be emailed to district and REN leaders:

1. Draft Grant Program Application Guidance: explains how grants will be administered and the expectations for grant activities, spending, and reporting that recipients will need to meet.
2. Application Forms: Eligible programs that are interested in the grant opportunity will be asked to complete and submit the forms. The information will be used in planning for grant allocations and technical assistance activities, as well as ensuring that eligible applicants meet the grant requirements.

Once the revised administrative rules are approved by the Council, staff will finalize and distribute the guidance and the application. Once applications are submitted and approved, ODE will issue grant agreements to qualifying applicants. Staff will be providing more communications and a webpage where information will be publicly available about these grants moving forward.

Technical Assistance and Evaluation

Through communities of practice (COP), technical assistance and support will be provided to district and REN staff for development and expansion of high quality mentorship programs available to beginning educators. Through various COP, staff will collaboratively unpack state standards, problem-solve, plan, and learn for improved mentorship program practices. District and program staff will also meet internally as a team separately from statewide COP to reflect on and integrate learning into program implementation. COPs will be organized around the standards that are relevant to the locus of control of different staff roles; for example:

- District leadership COP: focus on the Program standards (Program Administration, Collaboration, and Communication; Leadership Engagement; ProgrTribal am Assessment and Evaluation)
- Program leadership COP: focus on Process and Professional Practices standards (Roles and Responsibilities; Professional Learning; Teacher and Administrator Assessment; Instructional and Leadership Practices; Equity, Cultural Competence and Universal Access)

The facilitator of the COP will document and report on COP activities, learning, and outcomes to support scaling of best practices and recommendations for future communities of practice as well as for revisions to state standards.

In addition to providing Communities of Practice to support development of high quality mentorship programs, Willamette ESD's Center for Education Innovation, Evaluation and Research will be conducting a study during the 2024-2025 school year on mentorship programs and practices across the state, including but not limited to those funded by this grant. The purpose of the study is to explore the state of mentoring beginning teachers and administrators throughout Oregon. Specifically, the study will seek to identify innovative, successful models hosted by Regional Educator Networks and school districts, and to understand what is working, where it is working, under what conditions, with whom, and its impact on beginning teacher and administrator retention and practice.

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SUBJECT: Beginning Teacher and Administrator Mentorship Program; OARs 581-018-0130 through 581-018-0151 **STAFF NAME & OFFICE**: Emily McCaffrey, Educator Advancement Council The Beginning Teacher and Administrator Mentorship Program OARs must be revised to align with statutory changes adopted by the Legislature in 2023 (Senate Bill 283) and 2024 (Senate Bill 1552). The proposed revisions include: • Adds "educator networks" as defined in ORS 342.943 to eligible grant recipients (SB 283). • Updates the role of ODE and EAC in administering the program (SB 283). • Clarifies that for the 2023-2025 biennium, beginning teachers with a provisional license (Emergency or Restricted Licenses) may be supported with grant funds (SB 283). • Defines rural districts; clarifies application requirements (SB 283). • Allows noncompetitive awarding of grants in the 2023-2025 biennium (SB 1552). ☐ New Rule ☒ Amend Existing Rule ☐ Repeal Rule	☐ **First Reading** ☐ **Presentation** ☐ **No Presentation** ☒ **Action** ☐ **Temp Rule** ☐ **Presentation** ☒ **No Presentation**

BACKGROUND

1. History:
   In 2007, the Oregon Legislature passed HB 2574 authorizing the Oregon Department of Education (ODE) to establish a beginning teacher and administrator mentoring program. The Oregon Mentoring Program provided support to beginning teachers, principals, and superintendents (ORS 329.788 to 329.820).

   The State Board of Education adopted Oregon Administrative Rules 581-018-0130 through 581-018-0151 for the Oregon Beginning Teacher and Administrator Mentorship Program which authorizes ODE to award grants to school districts for programs that pair experienced mentors with beginning teachers and administrator. The Grant Program was established in 2007 and continued until its sunset in 2019.

   In 2023 and 2024, the Legislature made statutory changes to the program and provided one-time funding for the current biennium to ODE to issue grants under the program (SB 283, 2023 and SB 1552, 2024). The revised statute made several key changes, including that the Educator Advancement Council (supported by ODE) will administer the program, educator networks are eligible to apply for and receive funding, and naming five priority groups of educators to be supported with funds. The proposed revisions align existing rule with the revised statute.

2. Purpose

Current rules have been in place since 2015, with minor revisions adopted by the State Board in 2019. The rules describe definitions, program standards, purpose of the program, selection and duties of mentors, grant eligibility, grant application requirements and evaluation criteria, use of grant funds, and penalty for violation of the grant requirements.

3. Does the board have any areas of discretion or is this strictly mirroring statute?
   The majority of the rules are mirroring the statute, with these areas for discretion, which are to be determined in coordination with the EAC:
   - Definition of "Administrator's Present Position"
   - Definition of "Rural district"
   - Definition of "school district"
   - Mentoring program standards
   - Approved training or curriculum for mentors and beginning teachers and administrators
   - Annual grant award amount
   - Penalty amount for grantees determined to be in violation of program requirements

4. Stakeholder voice/input (individual and collective i.e., groups)
   The EAC office at ODE drafted the rule revisions narrowly to the changes made in the revised statutes; the staff did not make substantive changes to the existing rules unless it was affected by the new statute. The staff consulted partners involved in former and current mentoring programs across the state, individuals representing Regional Educator Networks, as well as agency staff, to ensure alignment with current best practice regarding district eligibility and definition of "rural district." The revised rules were then brought to the Educator Advancement Council for their review and approval in late March, and the Council voted to approve the revisions on April 3 at the Council meeting.

   Novice teachers and administrators employed in school districts, including education service districts, public charter schools, and state-operated schools, are affected by this grant program. The revisions to these rules aim to adhere to the statutory requirements of the program and not impose additional restrictions or requirements for the distribution, use, and evaluation of this one-time investment in order to minimize impact on district administrative processes while simultaneously upholding high standards that can lead to positive impacts for educators, students, and communities.

   Novice educators were not directly consulted, through their needs were often represented in conversations and input collected through the Regional Educator Networks. Given the limited scope of these rule revisions within statutory requirements, input is most helpful to inform the evaluation and technical assistance approach being employed by the agency in implementation of these one-time funds.

SUMMARY OF PREVIOUS BOARD ACTION

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

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This item went before the board at the May meeting for a first read. The board did not take action.

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 following revision has been updated to be clear that it only applies to the current biennium funds:

581-018-0145
Grant Application: Beginning Teacher and Administrator Mentorship Program
Each district or educator network that wishes to participate in the beginning teacher and administrator mentorship program shall submit a formal application to the Department of Education on behalf of the Educator Advancement Council. The application shall include:
(1) A description of the priorities to be addressed by moneys received by a school district or educator network for the mentorship program, including:
(a) Efforts to increase the number of culturally and linguistically diverse educators hired;
(b) Efforts to close the cultural and linguistic gap between the demographics of the students of the school district or school districts within the educator network and the demographics of the educators of the school district or school districts within the educator network; and
(c) For the 2023-2025 biennium, efforts to develop educators who hold an endorsement related to special education, who serve in rural districts, or who are diverse as defined in ORS 342.433; and efforts to continue existing mentorship relationships.

POLICY ISSUE OR CONCERNS

In revising the rules, staff have prioritized adherence to requirements of the law and being responsive to the current context and needs of the field in order to ensure mentoring grant funds are invested in ways that promote equitable and high quality mentoring experiences and outcomes. Through engagement with different groups in the field, we have heard concerns relating to the following policies and have addressed them in the following ways.

1. SB 283 names five priority groups that are to be prioritized in distributing funds during the 2023-25 biennium; these groups are reflected in the revised rules. These groups include educators serving in rural school districts, Special Education educators, and culturally and linguistically diverse educators; each of these groups serve students who are historically underserved. The process of distributing grant funds will prioritize these groups.

2. Representatives of school districts and educator preparation programs highlighted the importance of using funds to provide mentors to emergeny or restricted teaching license holders, which is allowable by law, as well as one of the named priority groups in SB 283. This is reflected in the revised rules for the 2023-25 biennium.

3. Mentoring programs, district leaders, and educators express that there is limited availability of experienced educators to act as mentors. In the rules revision, we have maintained the lowest allowable number of contact hours for mentors/educators as allowed by law, as well as clarifying that former educators can be mentors (in addition to retired educators). The rules provide flexibility for mentoring relationships to be developed and supported through multiple avenues, such as through professional learning opportunities, classroom observation, and 1:1 meetings – all of which can be provided virtually or in-person. Standards for mentoring relationships, activities, and programs have not been changed, as it is important to maintain the quality of mentoring experiences in order to have the best possible outcomes.

4. Mentoring programs, district leaders, and educators express the need for differentiated training for mentors with different levels of experience, as well as for mentors serving educators in positions that serve historically underserved students (Special Education educators, administrators, and educators in rural settings). We have addressed this by maintaining the standards for training, but in implementation, programs will provide their own training that meets the standards (rather than one state-provided training as had been done in the past). We are also offering comprehensive technical assistance to mentoring program staff to ensure programs are continuously improving in their delivery of high quality, culturally responsive mentorship programs.

EQUITY IMPACT ANALYSIS

The rules revision itself will not have a systematic effect on historically underserved students, educators, and communities as the revisions are updating existing program rules based on statute changes that are largely consistent with past practice.

SB 283 names five priority groups that are to be prioritized in distributing funds during the 2023-25 biennium; these groups are reflected in the revised rules. These groups include educators serving in rural school districts, Special Education educators, teachers on emergency licenses, and culturally and linguistically diverse educators; educators in some of these groups are historically underserved, and many of these groups disproportionately serve students who are historically underserved. The process of distributing grant funds will prioritize these groups. Additionally, the delivery of technical assistance to mentoring programs is focused on ensuring that programs are providing high quality, culturally responsive mentoring services to educators that are aligned to research and state standards, which specifically call on mentoring programs to implement practices that “accelerate the professional practice of beginning educators to positively impact student achievement” and “foster and develop culturally competent educators.” This will be monitored through the work of the technical assistance provider, as well as through ongoing evaluation of the grant program provided by a contracted evaluator.

The intended impact of this program, including the provision of technical assistance and evaluation services, is to increase the number of educators receiving high quality mentoring in Oregon. As a result of receiving high quality mentoring, educators should become more effective in serving students as well as continue to grow and advance in their careers. Prioritizing the groups of educators named in the bill is intended to ensure educators who are themselves members of underserved communities receive support, and that students who are historically and currently underserved experience well supported educators.

FISCAL ANALYSIS

The Mentoring Grant Program is funded at $8 million and included in the agency's budget for the 2023-2025 biennium as authorized by SB 283. School districts, public charter schools, state sponsored schools, and educator networks are eligible to apply for funds, which will be distributed noncompetitively. ODE did not receive any staffing or operations funds to administer this program, so it is being absorbed by current staff in the EAC office, procurement office, and budget and grants offices.

The proposed rule changes allow for the grant to be distributed noncompetitively, which is intended to reduce administrative burden on ODE and school districts in applying for and receiving grant funds. The proposed rule changes also add public charter schools as being eligible to apply for grants; this was done in order to ensure access to funding if a district does not apply for the grant. There are no other proposed rule changes that will impact the administration of this program from a fiscal perspective.

EFFECT OF A "YES" OR "NO" VOTE

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

Upon second reading, approval of this recommendation will enable the revised rules to be adopted and the grant program to move forward as planned for the 2024-2025 school year. If the Board does not approve the recommendation, the grant program will be put on pause until the Board approves the revised rules. This pause will delay the distribution of grants to approved districts and educator networks.

STAFF RECOMMENDATION

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

ATTACHMENTS

Attachment 1: Memo to Educator Advancement Council Dated March 27, 2024 Re: Mentoring Rules
Attachment 2: April 3 Educator Advancement Council Meeting Minutes

Proposed Oregon Administrative Rule Revisions: Oregon Beginning Teacher and Administrator Mentorship Program

Oregon Administrative Rules 581-018-0130 through 581-018-0151

581-018-0130
Definitions: Beginning Teacher and Administrator Mentorship Program

The following definitions apply to Oregon Administrative Rules 581-018-0130 through 581-018-0151 unless the context requires otherwise:

(1) "Administrator's Present Position" means being assigned in the role as a principal or a superintendent.

(2) "Beginning Administrator" means a principal or superintendent who:

(a) Possesses an administrative license issued by the Teacher Standards and Practices Commission;

(b) Is employed as a principal or superintendent by a school district; and

(c) Has been assigned for fewer than two school years in the administrator's present position.

(3) "Beginning Teacher" means a teacher who:

(a) Possesses a teaching license issued by the Teacher Standards and Practices Commission;

(b) Is employed at least half time, primarily as a classroom teacher, by a school district; and

(c) Has taught fewer than two school years, as a licensed teacher in any public, private, or state-operated school.

(4) "Classroom Teachers" means all teachers who provide direct instruction to students.

(5) "District" means a school district, an education service district, a public charter school, a state-operated school, or any legally constituted combination of such districts.

(6) “Educator Network” means an educator network established under ORS 342.943.

(7) “Rural district” means a district identified by the Oregon Department of Education as being located in an area that is designated by the US Census Bureau as located outside of a city or its urban fringe area for statistical purposes.

(~~6~~8) "Mentor " means an individual who:

(a) Is an acting or retired teacher, principal or superintendent;

(b) Has met established best practice and research-based criteria as defined by the Educator Advancement Council and adopted by the State Board of Education by rule

(c) Possesses a teaching or administrative license issued by the Teacher Standards and Practices Commission;

(d) Has successfully served for five or more years as a licensed teacher, principal or superintendent in any public school; and

(e) Has been selected and trained as described in ORS 329.815.

(~~7~~9) "Mentorship program" means a program provided by a mentor to a beginning teacher or administrator that includes, but is not limited to, direct classroom observation and consultation; assistance in instructional planning and preparation; support in implementation and delivery of classroom instruction; development of school leadership skills and other assistance intended to assist the beginning teacher or administrator to become a confident and competent professional educator who makes a positive impact on student learning.

(~~8~~10) "Teacher" means a licensed employee of a common or union high school district, an employee of an education service district or a state-operated school who has direct responsibility for instruction, coordination of educational programs or supervision of teachers and who is compensated for services from public funds. "Teacher" does not include a school nurse as defined in ORS 342.455 or a person whose duties require an administrative certificate.

(~~9~~11) “Mentoring” means a professional relationship between an educator and a skilled mentor. In a confidential and trusting partnership, the mentor supports the educator to transform practice through a process of reflection and inquiry. The goals of this collaborative and continuous work are: to accelerate instructional practice, ensure equitable learning for all students, retain effective educators, and empower educational leaders.

(~~10~~12) “Culturally or Linguistically Diverse” means characteristics of a person, including:

(a) Origins in any of the black racial groups of Africa but is not Hispanic;

(b) Hispanic in culture or origin, regardless of race;

(c) Origins in any of the original peoples of the Far East, Southeast Asia, the Indian subcontinent or the Pacific Islands;

(d) Origins in any of the original peoples of North American, including American Indians or Alaskan Natives; or

(e) A first language that in not English.

Statutory/Other Authority: ORS 326.051 & 329.795
Statutes/Other Implemented: ORS 329.790 - 329.820
History:
ODE 35-2019, minor correction filed 08/09/2019, effective 08/09/2019
ODE 24-2015, f. & cert. ef. 12-18-15
ODE 13-2015(Temp), f. & cert. ef. 7-15-15 thru 1-10-16
Renumbered from 581-020-0065 by ODE 1-2015, f. & cert. ef. 1-26-15
Renumbered from 581-020-0065 by ODE 43-2014, f. & cert. ef. 12-4-14
ODE 2-2008, f. & cert. ef. 1-25-08
EB 9-1990, f. & cert. ef. 1-30-90
EB 18-1988, f. & cert. ef. 3-16-88

581-018-0133
Mentoring Program Standards

(1) Districts or educator networks applying for an Oregon Beginning Teacher and Administrator Mentoring Program Grant shall align mentoring programs with the Mentoring Program Standards.

(2) Mentoring Program Standards describe the structures and functions, processes, and effective practices necessary for a quality program. Effective mentoring is foundational to a quality program. An essential element of a mentoring program is a professional mentor who understands and utilizes the skills, strategies and tools necessary for the continuous development of teachers and administrators.

(a) Program: Districts and educator networks are committed to integrating and sustaining comprehensive mentor programs targeting quality teaching and learning that aligns with other district and state initiatives and goals.

(A) Program Administration, Collaboration, and Communication: Quality mentor programs provides structures to assure a cohesive system for mentoring that is s supported at all levels. A Quality Mentor Program:

(i) Has a designated leader with sufficient resources, authority, knowledge and experience to guide program implementation and accountability.

(ii) Includes system-wide leadership.

(iii) Involves collaboration and coordination among program leaders and stakeholders to ensure that program goals and practices align with teacher preparation programs, educator professional learning, evaluation systems and other P-20 initiatives.

(iv) Develops and maintains structures and systems to promote two-way communication and stakeholder involvement.

(B) Leadership Engagement: Quality mentor programs require involved and informed leaders. Leaders in a Quality Mentor Program:

(i) Provide resources and conditions required to promote and improve teacher and administrator success.

(ii) Engage in professional learning in how best to support teachers and administrators.

(iii) Collaborate and coordinate with other mentor program leaders across the state.

(C) Program Assessment and Evaluation: Quality mentor programs collect data to evaluate and improve program effectiveness. A Quality Mentor Program:

(i) Purposefully and systematically collects data, using multiple measures, to demonstrate implementation, impact, and areas for continuous improvement.

(ii) Continuously and systematically shares evaluation findings with stakeholders~~1~~ to inform decision-making and accountability.

(b) Processes: Mentoring processes are characterized by collaborative cycles of inquiry that provide for standards based feedback loops leading to measurable outcomes and practices for the success of all students.

(A) Roles and Responsibilities: A quality mentor program carefully selects and assigns participants and clearly defines roles. A Quality Mentor Program:

(i) Has a formal, rigorous and timely process for recruiting and selecting mentors based on criteria consistent with the roles and responsibilities of mentoring.

(ii) Defines and communicates mentor roles and responsibilities that are focused on the continuous development of teacher and administrator practice.

(iii) Utilizes a standards based system of ongoing assessment for mentor growth and accountability.

(B) Professional Learning: Quality mentor programs expand the knowledge and refine the practice of mentors and mentees through a collaborative process, supported by research. A Quality Mentor Program:

(i) Establishes learning communities engaged in professional learning, problem-solving, and evidenced based collaborative inquiry for mentors, as well as teacher and administrator mentees.

(ii) Ensures participants apply new learning to mentoring practice through engaging in goal-setting and reflection, implementing inquiry action plans, and analyzing data.

(iii) Facilitates professional learning that is guided by research, standards, local priorities and the developmental needs of mentors, as well as teacher and administrator mentees.

(C) Teacher and Administrator Assessment: Quality mentor programs utilize a data based cycle of inquiry to assess effective instructional and leadership practices. A Quality Mentor Program:

(i) Includes self-reflection, goal setting, observations, and formative assessments.

(ii) Is designed to accelerate educator effectiveness to ensure that every student is ready for college, careers and engaged citizenship.

(iii) Includes multiple sources of evidence to assess teacher and administrator mentees' strengths and areas for growth and guide professional learning.

(c) Professional Practice:

(A) Instructional and Leadership Practices: Quality mentor programs accelerate the professional practice of beginning educators to positively impact student achievement. A Quality Mentor Program:

(i) Fosters self-reflection among teacher and administrator mentees to accelerate growth based on Oregon professional teaching or administrative standards.

(ii) Supports knowledge of curriculum standards, grade level and subject standards, pedagogy and performance levels for students.

(iii) Strengthens the ability of teacher and administrator mentees to analyze data in order to plan and differentiate instruction and programs.

(iv) Develops teacher and administrator mentees' knowledge and application of the physical, cognitive, emotional and social well-being of students.

(v) Supports collaborative partnerships among educators, families, and the community.

(B) Equity, Cultural Competence and Universal Access: Quality mentor programs foster and develop culturally competent educators. A Quality Mentor Program:

(i) Supports teachers and administrator mentees' knowledge of the cultural, gender, racial, ethnic, and socioeconomic characteristics of their classrooms, schools and community.

(ii) Expands teachers and administrators' self-awareness of cultural competency and how that impacts their learning, teaching and leadership.

(iii) Demonstrates a commitment to equity by developing culturally inclusive practices in teachers and administrators.

Statutory/Other Authority: ORS 326.051 & 329.795
Statutes/Other Implemented: ORS 329.790 - 329.820
History:
ODE 43-2014, f. & cert. ef. 12-4-14

581-018-0136
Pertaining to Beginning Teacher and Administrator Mentorship Program

The ~~State Board of Education~~ Educator Advancement Council shall establish a beginning teacher and administrator mentorship program to provide eligible beginning teachers and administrators in the state with continued and sustained support from a formally assigned mentor teacher or administrator. The legislative assembly finds that:

(1) The quality of teaching and administration in the public schools is of vital importance to the future of Oregon;

(2) Oregon has a special interest in insuring that the induction of beginning teachers and administrators into their profession enhances their professional growth and development by making a positive impact on student learning for all students, to help close the achievement gap;

(3) The formal assignment of mentors who have demonstrated the appropriate subject matter knowledge and teaching and administrative skills will substantially improve the induction and professional growth of beginning teachers in the state as well as provide mentors with additional and valuable opportunities to enhance their own professional growth~~.~~;

(4) Teachers and administrators who receive research-based, relevant mentoring produce students with a higher rate of achievement;

(5) School districts that have teacher mentoring have a higher rate of retention among teachers; and

(6) Administrators who receive mentoring improve their effectiveness as administrators and continue to improve throughout their careers.

Statutory/Other Authority: ORS 326.051 & 329.795
Statutes/Other Implemented: ORS 329.790 - 329.820
History:
Renumbered from 581-020-0060 by ODE 43-2014, f. & cert. ef. 12-4-14

ODE 2-2008, f. & cert. ef. 1-25-08
EB 9-1990, f. & cert. ef. 1-30-90
EB 18-1988, f. & cert. ef. 3-16-88

581-018-0139
The Selection, Nature and Extent of Duties of Mentor Teachers

(1) Based on the requirements of ORS 329.790 to 329.820, ~~T~~the selection, nature and extent of duties of mentors shall be determined:

(a) ~~b~~By the school district ~~based on the requirements of ORS 329.790 to 329.820.~~ that is the employer of the teacher or administrator and of the mentor;

(b) Jointly by the school district that is the employer of the teacher or administrator and the school district that is the employer of the mentor; or

(c) By an educator network.

(2) No teacher, principal or superintendent shall be designated as a mentor unless willing to perform in that role;

(3) No mentor shall participate in the evaluation of a beginning teacher or administrator for purposes of actions taken under ORS 342.805 to 342.937;

(4) Written or other reports of a mentor regarding a beginning teacher or administrator may not be used in the evaluation of beginning teacher or administrator.

(5) Each mentor shall complete successfully a training provided by the Oregon Department of Education on behalf of the Educator Advancement Council or approved according to criteria established by the ~~Department of Education~~ Educator Advancement Council while participating in the beginning teacher and administrator mentorship program~~;~~

(6) Mentors shall receive professional development before the school year begins and throughout the school year.

(~~6~~7) The grant received for each beginning teacher or administrator may be used by the district to compensate mentors or to compensate other individuals assigned duties to provide release time for teachers, principals or superintendents acting as mentors.

Statutory/Other Authority: ORS 326.051 & 329.795
Statutes/Other Implemented: ORS 329.790 - 329.820
History:
Renumbered from 581-020-0085 by ODE 43-2014, f. & cert. ef. 12-4-14
ODE 3-2008, f. & cert. ef. 1-25-08
EB 9-1990, f. & cert. ef. 1-30-90
EB 18-1988, f. & cert. ef. 3-16-88

581-018-0142
Eligibility: Beginning Teacher and Administrator Mentorship Program

(1) There is established a beginning teacher and administrator mentorship program to provide eligible beginning teachers and administrators in this state with a continued and sustained mentorship program from a formally assigned mentor.

(2) Any district or educator network is eligible to apply to participate in the beginning teacher and administrator mentorship program. Grants may be subject to application, evaluation, approval by the Oregon Department of Education on behalf of the Educator Advancement Council, and the legislative appropriation of funds.

(3) A school district may participate through an educator network or may enter into a partnership with another school district, an institution of higher education, an education service district or another organization to operate jointly a beginning teacher and administrator support program if:

(a) All moneys received as grants-in-aid for the mentorship program are administered by the participating school district to provide direct services to beginning teachers and administrators; and

(b) All other requirements of ORS 329.790 to 329.820 are met.

(4) The awarding of grants under OAR 581-020-0080 is subject to the availability of funds appropriated therefore.

Statutory/Other Authority: ORS 326.051 & 329.795
Statutes/Other Implemented: ORS 329.790 - 329.820
History:
ODE 36-2019, minor correction filed 08/09/2019, effective 08/09/2019
Renumbered from 581-020-0070 by ODE 43-2014, f. & cert. ef. 12-4-14
ODE 2-2008, f. & cert. ef. 1-25-08
EB 9-1990, f. & cert. ef. 1-30-90
EB 18-1988, f. & cert. ef. 3-16-88

581-018-0145
Grant Application: Beginning Teacher and Administrator Mentorship Program

Each district or educator network that wishes to participate in the beginning teacher and administrator mentorship program shall submit a formal application to the Department of Education on behalf of the Educator Advancement Council. The application shall include:

(1) A description of the priorities to be addressed by moneys received by a school district or educator network for the mentorship program, including:

(a) Efforts to increase the number of culturally and linguistically diverse educators hired; ~~and~~

(b) Efforts to close the cultural and linguistic gap between the demographics of the ~~district's teachers and administrators with the demographics of the students served by the school district~~students of the school district or school districts within the educator network and the demographics of the educators of the school district or school districts within the educator network; and~~.~~

(c) For the 2023-2025 biennium, efforts to develop educators who hold an endorsement related to special education, who serve in rural districts, or who are diverse as defined in ORS 342.433; and efforts to continue existing mentorship relationships.

(2) The names of all eligible beginning teachers and administrators employed by the district or a school district within the educator network and a description of their assignments. ~~and;~~

(~~2~~3) A description of the proposed mentorship program, which must provide at least 75-90 hours of frequent contact~~, totaling a minimum of 90 hours~~ between mentors and beginning teachers and administrators, throughout the school year.

(~~3~~4) A description of the research based training that will be provided to mentors ~~and beginning teachers and administrators~~ before the school year begins and throughout the school year, including: ~~.~~

(a) How research and knowledge on the needs of beginning teachers or administrators informs the training curriculum;

(4b) ~~A description of h~~How the training will build relationships of trust and mutual collaboration with beginning teachers and administrators~~.~~; and

(c) How the training supports mentors to meet the standards of a Quality Mentor Program described in OAR 581-018-0133.

~~(5) A description of the professional development mentors will receive before the school year begins and throughout the school year.~~

(~~6~~5) A school district or educator network shall certify in the application that all participating beginning teachers have less than 2 years of experience in any state and have a non-provisional license from the Teacher Standards and Practices Commission. This rule takes effect on July 1, 2025. ~~no eligible beginning professional educators are or may be under a conditional license, except as provided for by rules of the Teacher Standards and Practices Commission.~~

Statutory/Other Authority: ORS 326.051 & 329.795
Statutes/Other Implemented: ORS 329.790 - 329.820
History:
ODE 37-2019, minor correction filed 08/09/2019, effective 08/09/2019
ODE 24-2015, f. & cert. ef. 12-18-15
ODE 13-2015(Temp), f. & cert. ef. 7-15-15 thru 1-10-16
Renumbered from 581-020-0075 by ODE 43-2014, f. & cert. ef. 12-4-14
ODE 2-2008, f. & cert. ef. 1-25-08
EB 9-1990, f. & cert. ef. 1-30-90
EB 18-1988, f. & cert. ef. 3-16-88

581-018-0148
Funding: Beginning Teacher and Administrator Mentorship Program

(1) Subject to ORS 291.230 to 291.260, the Department of Education shall distribute grants-in-aid on behalf of the Educator Advancement Council to qualifying ~~school~~ districts or educator networks to offset the costs of beginning teacher and administrator mentorship programs. A qualifying district or educator network shall receive annually an amount that is aligned with evidence-based best practices for beginning teachers and administrators approved for support.

(2) If the funds are insufficient for all eligible proposals, the Department of Education, on behalf of the Educator Advancement Council, shall award grants on a competitive basis taking into consideration:

(a) Successful or promising efforts to increase the number of culturally and linguistically diverse educators hired; and

(b) Closing the cultural and linguistic gap between demographics of ~~the district's~~ teachers and administrators and the demographics of students served by ~~of~~ the ~~school~~ district or educator network; and

(~~3~~c) Whether the ~~school~~ district is a small ~~school~~ or rural district ~~or serves a rural community, geographic and demographic diversity~~ or whether the educator network serves small or rural districts.

(3) Notwithstanding ORS 329.805 (2), grants awarded under ORS 329.805 during the 2023-2025 biennium are not required to be awarded on a competitive basis. The Oregon Department of Education, on behalf of the Educator Advancement Council, shall establish a maximum award amount for qualifying districts or educator networks based on funds available. This rule expires on July 1, 2025.

Statutory/Other Authority: ORS 326.051 & 329.795
Statutes/Other Implemented: ORS 329.790 - 329.820
History:
ODE 38-2019, minor correction filed 08/09/2019, effective 08/09/2019
ODE 24-2015, f. & cert. ef. 12-18-15
ODE 13-2015(Temp), f. & cert. ef. 7-15-15 thru 1-10-16
Renumbered from 581-020-0080 by ODE 1-2015, f. & cert. ef. 1-26-15
Renumbered from 581-020-0080 by ODE 43-2014, f. & cert. ef. 12-4-14
ODE 2-2008, f. & cert. ef. 1-25-08
EB 25-1990(Temp), f. & cert. ef. 5-18-90
EB 9-1990, f. & cert. ef. 1-30-90
EB 36-1988, f. & cert. ef. 8-5-88
EB 18-1988, f. & cert. ef. 3-16-88

581-018-0151
Violation and Penalty: Beginning Teacher and Administrator Mentorship Program

A district or educator network that is determined by the Department of Education on behalf of the Educator Advancement Council to be in violation of one or more of the requirements of OAR 581-018-0130 through 581-018-0151 may be required to refund all grants-in-aid moneys distributed under 581-018-0148. The amount of penalty shall be determined by the ~~State Board of Education~~ Department of Education on behalf of the Educator Advancement Council.

Statutory/Other Authority: ORS 326.051 & 329.795
Statutes/Other Implemented: ORS 329.790 - 329.820
History:
ODE 39-2019, minor correction filed 08/09/2019, effective 08/09/2019
ODE 5-2019, minor correction filed 01/10/2019, effective 01/10/2019
Renumbered from 581-020-0090 by ODE 43-2014, f. & cert. ef. 12-4-14

ODE 3-2008, f. & cert. ef. 1-25-08
EB 18-1988, f. & cert. ef. 3-16-88

Educator Advancement Council

Meeting Minutes

April 3, 2024
9:00 AM - 3:00 PM
In-Person
Lane ESD
1200 State HWY 99 N Eugene, OR 97402

Youtube Livestream Link will be posted each day of the meeting on the EAC Website

Attending: Andi Bales Molnar, Carmen Xiomara Urbina, Melissa Goff, Jana Giles, Karen Perez-Da Silva, Mark Girod, Amanda Manjarrez, Misty Talerico, Elena Barreto, Traniece Brown-Warrens, Michele Oakes, Lisa Hasuike, Susan McLain

Invited Presenters: Steven Malik, Western REN Staff

Excused: Ardis Clark, **Veronica Dujon, Leah Dunbar, Sue Rieke-Smith, Rebekah Sabzalian, Diana Juarez, Shannon Criss**

Staffing: Sara Spencer,Interim Executive Director; **Dr. Lynne Gardner,** Director of Program Development and Assessment; **Mercedes Jones**, Director of Professional Learning, **Emily McCaffrey**, Chief of Operations & Policy; **Elizabeth Tinoco,** Executive Assistant/Council Administrator, **Eoin Bastable**, Data & Research Analyst

April 3, 2024

9:10 1.0 Call to Order Chair Bales Molnar
Chair Bales Molnar calls a meeting to order. Gives some welcome remarks and gives some building housekeeping announcements.

9:11 *Director Perez-Da Silva joins the meeting.*

9:12 *We had some technical issues with sound, EAC staff had to fix it for a few minutes.*

9:23 *Because we have some directors that need some extra minutes this morning to arrive, we need to shift the meeting this morning.*

9:24 4.0 Teacher Leadership Research and Discussion Stephen Malik
Mercedes Jones introduces Stephen Malik from Mathematica who begins with his presentation. He has directors begin with an icebreaker: If you had to create a

definition of teacher leadership,what would you include? He also has a couple of them share out. Mercedes joins Stephen in the presentation. (Please refer to the meeting materials for the slide deck).

9:27 *Director Talerico and Director Brown-Warrens join the meeting.*

9:35 *Representative Susan McLain joins the meeting.*

9:45 *Discussion continued between Stephen Malik and EAC directors about teacher leadership research.*

9:55 *Stephen conducts an activity with directors, then brings them together to have a discussion.*

10:08 *Director Urbina joins the meeting.*

10:20 *Stephen has directors write ideas on post-it notes and post them in the back poster for EAC staff to collect. With this he concludes his presentation.*

10:25 *Steven thanks directors and shares his contact information with directors.*

10:27 1.1 Roll Call Elizabeth Tinoco

Chair Bales Molnar calls Elizabeth to take Roll call, Elizabeth takes Roll call and confirms that we have a quorum based on the number of seats filled and seats vacant. In order to reach quorum for today's meeting we had to open the meeting last minute to just Director Melissa Goff via hybrid to be able to reach quorum for today.

10:29 2.0 Consent Agenda – Action Items Chair Bales Molnar

2.1 Agenda Approval

2.2 Approval of February 7, 2024 meeting minutes

Chair Bales Molnar gives directors a few minutes to look over the meeting minutes and today's agenda for approval.

10:32 *Chair asks for a motion to approve the consent agenda. Director Manjarrez moves to approve the consent agenda. Director Giles seconds. Roll call, vocal vote. All approve. Motion passes.*

10:35 3.0 Public Comment Chair Bales Molnar

During the meeting.To provide public testimony, sign in at the meeting or submit written testimony 24 hours prior to the meeting to eacinfo@oregonlearning.org. Each group may have one speaker; each individual or group spokesperson will have three (3) minutes. The Council welcomes and appreciates public input, but due to time constraints is unable to respond directly to testimony

Elizabeth confirms that we do not have any public comment.

10:20 Break

10:49 6.0 Administrative Rules Review and Action — Emily McCaffrey, Mercedes Jones

6.1 Action Item- SB 283 Mentoring Grant Program Rules Revision

6.2 Action Item- Regional Educator Network Temporary Rules Revision

Chair brings everyone back from break and explains that we will move some agenda items around to accommodate our time for today for some directors. She hands it over to Emily and Mercedes who will explain the concepts about the ODE administrative rules process. Discussion followed. (please refer to the meeting materials for the slide deck). Emily proceeds with explaining the SB 283: Mentoring Grant Program Rules Revision, she explains to the directors that if they need more time to look them over and want more time before voting to approve we can wait to approve them in the June meeting. However, EAC staff want them to be aware of them now because they are not huge changes. Discussion followed.

11:36 *Chair Bales Molnar asks for the council to approve the rules revision. Director Manjarrez moves motion, Director Perez seconds. Chair asks directors to say "I" if they are in favor to approve the rules revision for the SB283 Mentoring Program. All approve, motion passes.*

11:38 *Mercedes proceeds with the REN workgroup Administrative rules, she gives some background, next steps and recent rules revision on the topic that directors need to vote to approve. Discussion followed. (Please refer to the meeting materials for the slide deck).*

12:00 *Director Manjarrez moves motion to approve the rules revision, Director Brown-Warrens seconds. Chair asks directors to say "I" to approve. All approve, motion passes.*

12:01 *Mercedes gives an update on the request from South Coast ESD. More information to come in the June meeting.*

12:00 7.0 Working Lunch: Connecting with Western REN — Western REN

Western REN staff are invited to join the EAC meeting to connect with EAC directors about REN work throughout the year.

Director Hasuike and Director Goff leave the meeting during lunch.

1:02 8.0 Educator Equity Report — Eoin Bastable

Chair Bales Molnar welcomes everyone back from lunch and introduces Eoin Bastable (Data and Research Analyst- EAC Staff) to present on the Educator Equity Report. Eoin brought an activity and has directors participate in groups for 10 minutes.

1:35 *Eoin invites directors to share their thoughts from the activity. Discussion followed.*

1:38 *Director Manjarrez leaves the meeting.*

1:56 5.0 Council Business Sara Spencer

5.1 SB 1552
5.2 Intergovernmental Agreement
5.3 Membership
5.4 Executive Director Hiring
5.5 Strategic Planning

Chales Bales Molnar hands it over to Executive Director Sara Spencer, she moves to agenda item 5.0 and begins with SB 1552. (Please refer to the meeting materials for the slide deck) Emily jumps in to help explain what the changes mean with this bill. Executive director moves to agenda item 5.2 intergovernmental agreement and gives an update about that, and also includes that in the June meeting directors will be able to vote in new directors including director Talerico. Agenda item 5.3 Membership- Executive director gives an update about seats that are vacant and seats that will become vacant in June. Agenda item 5.5 Strategic Planning Update- we had a setback with our contractor and we have enlisted in the support of the REL to conduct pre-phase work. 5.4 Executive Director Hiring Update- We will not have an Executive director hired by the date previously mentioned which was July 1, 2024.

2:20 9.0 Pre-visioning Activity Sara Spencer

Executive Director Spencer has directors participate in an activity. (please refer to the meeting materials for the slide deck).

2:40 *Executive director Spencer brings the directors back to the big group. She explains that will*

2:08 10.0 Acknowledgements and Celebrations Sara Spencer

Announcements:

Chair Bales Molnar moves to agenda item 10.0 acknowledgements and celebrations and opens the floor up.
Executive director Spencer wants to celebrate the GYO summit that was hosted in Salem in February.
Director Talerico talks about SB2022 and the celebration that came with that, classified staff are now recognized as educators.
Chair Bales Molnar wants to celebrate another successful day together with the EAC staff.

2:47 *Director Oakes would like Executive director Spencer to share a little more about the EAC measurement and evaluation planning project and also the SB283 Education Staff Survey Planning project. Discussion followed.*

2:57 11.0 Adjourn **Chair Bales Molnar**

Chair Bales Molnar adjourned the meeting.

Oregon State Board of Education
MEETING DATE

AGENDA ITEM:

SUBJECT: Sign Language Interpreter Rule change **STAFF NAME & OFFICE**: Georgeann Harty OESO HB 2696 passed in the 2023 legislative session. This bill directed the Oregon Health Authority (OHA) Health Licensing Office (HLO) to develop a Licensing Board for educational, medical, and legal sign language interpreting licenses. ☐ New Rule ☒ Amend Existing Rule ☐ Repeal Rule	**First Reading** **Presentation** ☒ **No Presentation** ☐ **Action** ☐ **Temp Rule** ☐ **Presentation** ☐ **No Presentation**

BACKGROUND

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

1. History:
    a. HB 2696 passed in the 2023 legislative session. This bill directed the Oregon Health Authority (OHA) Health Licensing Office (HLO) to develop a Licensing Board for educational, medical, and legal sign language interpreting licenses.
    b. To the establishment and maintenance of standards to ensure that personnel providing special education and early childhood special education and early intervention services are appropriately and adequately trained

2. This bill removes the direction and guidance for ODE to inform districts on specifics of Interpreter licensing in education. Our current OAR 581-015-2035 gives minimum guidelines to schools and interpreters. Any further guidance and rules needed will be created by OHA/HLO. 581-015-2035
    a. What is the current requirement in rule or statute?

        581-015-2035
        Minimum Standards for Sign Language Interpreters Serving Students in Public Schools

    b. Why is this rule being brought forward right now?

        1. Our revision of OAR 581-015-2035 will give direction that licensure must be obtained through OHA/HLO to interpret in schools.

Oregon State Board of Education
MEETING DATE
AGENDA ITEM:

3. Purpose
    a. What function does the current rule hold?
        i. Sighn language interpreter requirements and direction
    b. How long has the rule been in place?
        i. Since 2008
4. Does the board have any areas of discretion or is this strictly mirroring statute? This rule follows the guidelines from statute.
    a. If the board does have discretion, those areas should be called out here or in the next section.
5. Stakeholder voice/input (individual and collective i.e., groups)
    a. Who was involved in bringing this to the Board? Office of Enhancing Student opportunities(OESO)
    b. What did engagement in this process entail? engagements, and meetings.
    c. Who may be affected by this? Districts, Students who are deaf, ESDs
    d. Whose voice is missing?
    e. What additional information does the Board need prior to moving forward?

SUMMARY OF PREVIOUS BOARD ACTION

1. Has this been before the board before? no If so, what action did the board take? First read

HAS THE RULE CHANGED SINCE LAST BOARD MEETING?

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? Meetings with schools and community agencies

b. Who are the historically underserved groups affected?
The lack of sign language interpreter services directly impacts students served in special education. Historically underserved groups are naturally a part of the students served in special education.

c. Has there been consultation or collaboration with tribes in this rule change or policy decision?
no

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?
This rule is to support students in special education.

2. Negative/Positive Effects
   a. What is the impact on the population most affected by this rule that the board should consider?
   Health Licensing office is filing their new rules and have a board set up now.
   b. What possible opportunities, assets or access could this rule provide?
   A higher level of interpreting services for students in Oregon.
   c. What is the impact on eliminating the opportunity or achievement gap?
   A higher caliber of interpreters will help students access their education.
   d. Have all the potential unintended consequences been considered?
   A gap of not having enough interpreters due to licensing requirements.
   e. Does this rule advance the ESSA goals?
   n/a
3. What are the barriers to more equitable outcomes, either:
   a. State or federally mandated? State mandate.
   b. Political?
   c. Emotional?
   d. Financial? Costs of license and required tests
   e. Programmatic? A lack of sign language interpreters
   f. Language?
   g. Geography? It is harder to find staff in rural areas of Oregon.
   h. Size?

EQUITY IMPACT ANALYSIS

Oregon State Board of Education
MEETING DATE
AGENDA ITEM:

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?
   Students experiencing low incidence disabilities, inclusive of the myriad of intersecting identities (i.e. race, class, gender, socioeconomic status, linguistic background, and family constellation) being served in districts birth-21, will have access to licensed sign Language Services.
1. Examine the impact of the rule changes, policy, or action on historically underserved populations in Oregon. Describe this ongoing and/or foreseeable impact, using as much detail as possible.
   The rural areas and hard to fill areas will still struggle to fill positions
2. Explain how the rule change, policy or action works toward improving achievement, opportunities, and a sense of worthiness for underserved students?
   Language development and literacy go hand in hand. This program with assist with students served in special education access licensed Sign language interpreter.

FISCAL ANALYSIS

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

1. How does the proposed rule fit within the budget of the agency?
   a. Which units/divisions/offices will be impacted and how?
      no change for the agency
2. How does the proposed rule change impact school districts and ESDs?
      i. A continued hard to fill position
3. How does the proposed rule change impact schools and other educational institutions?
      i. Having access to licensed interpreters will elevate the skills for students served and may make finding interpreters more difficult.
4. Does the proposed rule change impact other stakeholders?
   Students who are deaf, community interpreting agencies, sign language interpreters

EFFECT OF A "YES" OR "NO" VOTE

If the Rule is not adopted ODE's rule will cause conflict and be out of compliance with the new OAR and Health department rules.

STAFF RECOMMENDATION

Oregon State Board of Education
MEETING DATE

AGENDA ITEM:

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

ATTACHMENTS

Attachment 1:

581-015-2035
Minimum Standards for Sign Language Interpreters Serving Students in Public Schools

(1) Definitions. For purposes of this rule, the following definitions shall apply:

(a) “CI” means Certificate of Interpretation issued by RID.

(b) “CT” means Certificate of Transliteration issued by RID.

(c) “EI/ECSE” means Early Intervention and Early Childhood Special Education.

(d) “EIPA” means the Educational Interpreter Performance Assessment®, including both the written and performance components.

(e) “NIC” means the National Interpreter Certification by RID.

(f) “Public School” means a public agency or school district or as defined in OAR 581-015-2000.

(g) “RID” means Registry of Interpreters for the Deaf Inc.

(h) “Sign Language Interpreter” means a person who provides educational interpreting services to students with hearing impairments.

(i) “Student” means a student with a hearing impairment who is:

(A) Eligible for EI/ECSE or special education services under OAR 581-015-2150; or

(B) A qualified student with a disability under Section 504 as defined in OAR 581-015-2390.

(2) Minimum Standard. A public school may employ or contract for the services of a sign language interpreter for a student only if the sign language interpreter is licensed through the Health Licensing Office, and meets the following minimum standards:

(a) The sign language interpreter must achieve a passing score of 3.5 or above on the EIPA Performance Test or hold RID NIC, CI or CT Certification; and

(b)(A) Hold a Bachelor’s or Associate’s Degree from an Interpreter Education Program or in a related educational field; or

(B) Achieve a passing score on the EIPA Written test.

~~(3) Continuing professional development. Each sign language interpreter must complete and document 12 seat hours of continuing professional development related to sign-language interpretation each school year that the sign language interpreter is employed by or working under a contract for a public school in Oregon. A public school may only employ or contract for the services of sign language interpreters that meet this continuing professional development requirement.~~

~~(4) Timeline for meeting rule requirements. Sign language interpreters must meet the following requirements if the interpreter is employed by or under a contract with a public school:~~

~~(a) On or after July 1, 2008, the interpreter must meet the standards required by section (3) of this rule.~~

~~(b) On or after July 1, 2013, the interpreter must meet all of the requirements of this rule.~~

Statutory/Other Authority: ORS 185.225 & 343.041
Statutes/Other Implemented: ORS 185.110 & 185.225
History:
ODE 11-2008, f. & cert. ef. 4-21-08

581-015-2340
Procedural Rules for Due Process Hearings

(1) Pursuant to an interagency agreement with the Office of Administrative Hearings, the Office of Administrative Hearings will assign administrative law judges to conduct special education due process hearings.

(2) The Department of Justice's model rules for administrative hearings, OAR 137-003-0501 through 137-003-0700, apply to the extent consistent with federal law and these division 15 regulations, except that:

a. The school district is required to provide any evidence without undue delay to:

(A) A parent, if the parent requests the evidence;

(B) The Department of Education, a court or an entity designated by the department or court, if the department, court or entity requests the evidence; or

(C) A parent, the department, a court or an entity designated by the department or court if the evidence was provided to the school district's attorney and is not subject to attorney-client privilege;

(b) Any evidence provided to a parent, the department, a court or a designated entity of the department or court may be redacted only to the extent necessary to protect personally identifiable information of other students unless disclosure is authorized by law or court order;.

(3) The Department's interagency agreement with the Office of Administrative Hearings will identify delegations of authority and the application of the rules in this section.

Oregon State Board of Education
June 13, 2024
AGENDA ITEM: 4.E.

SUBJECT: OAR 581-015-2300: Access to Student Education Records and OAR 581-015-2340: Procedural Rules for Due Process Hearings Eric Wells, Director of IDEA Programs, Office of Enhancing Student Opportunities Mike Franklin, Special Education Legal Specialist, Office of Enhancing Student Opportunities SB 758 amended ORS 343.173 by adding a 10 business day requirement for school districts to provide records pertaining to the identification, evaluation, and educational placement of the child and the provision of a free appropriate public education (FAPE) to the child. It further clarified that records may only be redacted to the extent necessary to protect personally identifiable information (PII) of other children unless disclosure is authorized by law or court order. SB 758 also amended ORS 343.165 to add a requirement that school districts provide any evidence without undue delay to specific entities including the parent, if the evidence was provided to the school district's attorney and is not subject to attorney-client privilege. Any evidence provided may be redacted to the extent necessary to protect personally identifiable information of other students unless disclosure is authorized by law or court order. This docket describes required OAR updates to align with the new statutory requirements. ☐ New Rule ☒ Amend Existing Rule ☐ Repeal Rule	☐ **First Reading** ☐ **Presentation** ☐ **No Presentation** ☒ **Action** ☐ **Temp Rule** ☐ **Presentation** ☒ **No Presentation**

BACKGROUND

The Oregon legislature amended ORS 343.173 and ORS 343.165 with the passage of Senate Bill (SB) 758 during the 2023 legislative session. There are two key domains of changes required by SB 758 that are being brought before the Board in this docket. These updates are related to due process hearing requirements, which include the disclosure of school records under OAR 581-015-2300 (Access to Student Records) and the disclosure of evidence under OAR 581-015-2340 (Procedural Rules for Due Process Hearings). Historically these rules have directly mirrored state and federal statute given the complexity and specificity of the requirements in this area of rule.

History
OAR 581-015-2300 (Access to Student Education Records) was developed in 2000 and has not been amended since that time other than being renumbered from 581-015-0606 in 2007.

OAR 581-015-2340 (Procedural Rules for Due Process Hearings) was developed in 2003 and has not been amended since that time other than being renumbered from 581-015-0097 in 2007.

Oregon State Board of Education
June 13, 2024
AGENDA ITEM: 4.E.

Purpose
The purpose of ORS 343.173 is to ensure that parents are able to receive copies of their student's special education records in a timely manner so that they can be fully informed about educational matters related to their student. This is required by FERPA (34 CFR §§ 99.1 to 99.38) as well as the IDEA (34 CFR § §§ 300.610 to 300.627 and 34 CFR §§ 303.401 to 303.411).

ORS 343.165 governs due process hearing procedures and requirements. These requirements are in place to ensure that school districts and parents know when such proceedings are available and how the entire process will be conducted. SB 758 amended ORS 343.165 by requiring that, during due process hearing proceedings, school districts provide special education records to parents, the Oregon Department of Education (ODE), a court or an entity designated by the department or court if the evidence was provided by the school district's attorney and is not subject to attorney-client privilege. Records may be redacted only to the extent necessary to protect PII of other children unless disclosure is authorized by law or court order. The purpose of this is to ensure that parents, the department, a court, or an entity designated by the department or the court can prepare for due process hearings in a more expedient fashion.

Board Discretion
These changes to OAR 581-015-2300 and OAR 581-015-2340 are required to align with the updates in ORS 343.173 and ORS 343.165. The language used in the amendments directly reflects the language in statute. There is no discretion.

Stakeholder Voice/Input
These amendments were brought forward to the Rules Advisory Committee (RAC) for discussion on May 2, 2024 and was discussed at the RAC on June 6, 2024. Special Education Directors were informed about the updates during a Fall 2023 Special Education Directors meeting.

SUMMARY OF PREVIOUS BOARD ACTION

This matter had a first reading before the board for first reading on May 16, 2024.

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 rule changes came about due to the advocacy of families of students experiencing disability to ensure their right to a fair due process. The Department shared these updates with special education directors as another partner group who would be impacted by the rule updates. The Department did not conduct tribal consultation or collaboration as part of this rule change due to the non-discretionary nature of the rule updates. This rule change is designed to enhance the rights of parents and their

students during due process, but the Department was unable to identify additional ways to further modify or enhance this rule's outcomes.

Parents of students experiencing disabilities will now have access to special education records within 10 business days, which enables them to be more fully informed about their students' progress and be more actively engaged with their students' education.

These rule changes advance equitable outcomes, however as these rule changes directly mirror statute, the options for further advancing equitable outcomes were limited.

EQUITY IMPACT ANALYSIS

Historically underserved populations will be impacted by the amendments to this rule, as they enhance the ability of the parents of these students to **receive copies of** special education records within **ten business days** rather than simply having the opportunity to **review** special education records within **45 days**. They will also benefit from the requirement that these records be provided without "undue delay" during preparation for due process hearings.

FISCAL ANALYSIS

There is no fiscal impact of this proposed rule change to the Department of Education. There is the potential for some fiscal impact to school districts and ESDs, as the requirement to provide copies of special education records within ten business days could result in some increased staffing costs in order to meet this timeline.

EFFECT OF A "YES" OR "NO" VOTE

A "YES" vote ensures that this OAR is in compliance with the underlying statute, whereas a "NO" vote will mean that this OAR is inconsistent with amendments made to the statute during the 2023 legislative session.

STAFF RECOMMENDATION

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

ATTACHMENTS

Attachment 1: DRAFT OAR 581-015-2300: Access to Student Records
Attachment 2: DRAFT OAR 581-015-2340: Procedural Rules for Due Process Hearings

581-015-2300
Access to Student Education Records

(1) For purposes of ensuring the safeguards required for education records of children with disabilities, including early intervention and early childhood special education records, the Department adopts by reference the provisions of FERPA, 34 CFR 99.1 to 99.38, the IDEA, 34 CFR 300.610 to 34 CFR 300.627 and 34 CFR 303.401 through 303.411.

(a) For children with disabilities under age three, references to a "student" in these rules means an infant or toddler with a disability.

(b) For children with disabilities under age three, "student records" means EI records.

(2) This provision includes all education records with respect to:

(a) The identification, evaluation, and educational placement of the child; and

(b) The provision of a free appropriate public education to the child.

(3) The program, district, agency, or contractor must comply with a parent's request to inspect and review records without unnecessary delay and provide copies of these records to the parent within the following timelines:

(a) For children under age three, before any meeting regarding an IFSP, or any hearing pursuant to 303.430(d) and 303.435 through 303.340, and in no case more than 10 business days after the request has been made.

(b) For children over the age of three, before any meeting regarding an IEP/IFSP, or any due process hearing, or resolution session related to a due process hearing, and in no case more than ~~45~~10 business days after the request has been made.

(4) Records may be redacted only to the extent necessary to protect personally identifiable information of other children unless disclosure is authorized by law or court order.

Created by SP 4/11/2024

581-022-2120
Essential Skill Assessments for English Language Learners

(1) Definitions. As used in this rule:

(a) “Assessment option” means an assessment approved to assess proficiency in the Essential Skills for the purpose of earning a high school diploma or a modified diploma.

(b) “English Language Learner” (ELL) means a student who meets the definition of “Limited English Proficient” found in Title IX, Part A, Section 9101.25 of the No Child Left Behind Act of 2001 (NCLB).

(c) “Essential Skills” means process skills that cross academic disciplines and are embedded in the content standards. The skills are not content specific and can be applied in a variety of courses, subjects, and settings.

(d) “Qualified Rater” means any individual who is:

(A) Trained to a high degree of proficiency in scoring the assessment administered to the student; and

(B) Endorsed by the school district or public charter school, consistent with local school board policy, as proficient in the student’s language of origin for the purposes of accurately scoring the student’s work in the student’s language of origin.

(2) Consistent with OAR 581-022-2115, school districts and public charter schools must adopt a policy whether to allow ELL students to demonstrate proficiency in all required Essential Skills in the students’ language of origin.

(3) If a school district or public charter school adopts a policy allowing ELL students to demonstrate proficiency in the Essential skills in the students’ language of origin under Sections 2 and 3 of this rule, that policy must include the following:

(a) Development of a procedure to provide assessment options as described in the Test Administration Manual in participating ELL students’ language of origin.

(b) Development of a procedure to ensure that locally scored assessment options administered in an ELL student’s language of origin are scored by a qualified rater.

(4) Consistent with section (22) of OAR 581-022-2115 Assessment of Essential Skills, the requirements established by sections (2) and (3) of this rule are waived through the end of the 2027-28 school year.

Statutory/Other Authority: 329.075 & ORS 326.051
Statutes/Other Implemented: ORS 329.045, 329.075 & 329.485
History:
ODE 18-2019, amend filed 05/17/2019, effective 05/17/2019
ODE 10-2018, amend filed 04/03/2018, effective 04/03/2018
Renumbered from 581-022-0617 by ODE 16-2017, f. & cert. ef. 7-5-17

ODE 22-2016, f. & cert. ef. 3-22-16
ODE 18-2010, f. & cert. ef. 12-17-10

Oregon State Board of Education
June 13, 2024
AGENDA ITEM: 4.F.

SUBJECT: OAR 581-022-2120 Essential Skill Assessments for English Language Learners **STAFF NAME & OFFICE**: Susan Payne, Office of Teaching, Learning, and Assessment; Emily Nazarov, Office of the Director This rule needs to be updated to align with the waiver of the Essential Skills Assessments requirement that is in place through the 2027-28 school year. ☐ New Rule ☒ Amend Existing Rule ☐ Repeal Rule	☐ **First Reading** ☐ **Presentation** ☐ **No Presentation** ☒ **Action** ☐ **Temp Rule** ☐ **Presentation** ☒ **No Presentation**

BACKGROUND

Senate Bill 744 (2021) suspended the requirement for a student to demonstrate proficiency in Essential Learning Skills as a condition of receiving a high school diploma during the 2021-2022, 2022-2023 and 2023-2024 school years. In October 2023, this suspension was extended through the 2027-28 school year by the State Board of Education, allowing further time for the Oregon Legislature to address the SB 744 Report, Community-Informed Recommendations for Equitable Graduation Outcomes**,** published by ODE on September 1, 2022.

OAR 581-022-2120 Essential Skill Assessments for English Language Learners requires districts to have a policy for whether to allow ELL students to demonstrate proficiency in all required Essential Skills in the students' language of origin. When revisions were made to the Assessment of Essential Skills rule (OAR 581-022-2115) in October 2023 to extend the suspension of the requirement, a revision to the rule outlining the policy requirement (OAR 581-022-2120) was not included.

The goal of this rule revision is to align the two Division 22 OARs that govern the assessment of Essential Skills by also waiving the policy requirement through the end of the 2027-28 school year. Currently, as part of the Division 22 Standards assurance process, districts are required to report on compliance with OAR 581-022-2120 Essential Skill Assessments for English Language Learners even though the actual assessment of Essential Skills is itself waived. This has caused some confusion and unnecessarily complicates the assurance process.

SUMMARY OF PREVIOUS BOARD ACTION

In October 2023, the Board adopted a revision to OAR 581-022-2115 Assessment of Essential Skills, which temporarily waived the Essential Skills graduation requirements for students graduating through the 2027-28 school year.

HAS THE RULE CHANGED SINCE LAST BOARD MEETING?

☐ N/A; first read—hasn't been before board

Oregon State Board of Education
June 13, 2024

AGENDA ITEM: 4.F.

☒ No; same as last month
☐ Yes – As follows:

POLICY ISSUE OR CONCERNS

There are numerous policy issues and concerns related to the suspension of the assessment of Essential Skills graduation requirements, many of which were discussed at the Board's October 2023 meeting; however, the proposed revision to OAR 581-022-2120 would not impact the current waiver of OAR 581-022-2115 Assessment of Essential Skills, nor any future decisions regarding Essential Skills requirements. This revision simply aligns the two rules so that both requirements are suspended simultaneously.

EQUITY IMPACT ANALYSIS

OAR 581-022-2120 Essential Skill Assessments for English Language Learners has a direct impact on equity in that it requires districts to have a policy about whether students can demonstrate proficiency in their "language of origin." When the Essential Skills Assessments waiver expires and if/when the assessments are reinstated, the policy requirements will also be reinstated.

FISCAL ANALYSIS

The temporary waiver of this requirement will have no fiscal impact.

EFFECT OF A "YES" OR "NO" VOTE

A "yes" vote will result in alignment between the two rules in Division 22 that govern the assessment of Essential Skills requirements by temporarily waiving the requirement for districts to have a policy in place for whether to allow ELL students to demonstrate proficiency in all required Essential Skills in the students' language of origin during the same period that the assessment of Essential Skills graduation requirement is also waived.

A "no" vote will result in the maintenance of the requirement for districts to have a policy in place and if they do not, a district would have to report out of compliance on its Division 22 Standards assurances and submit a plan for corrective action.

STAFF RECOMMENDATION

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

ATTACHMENTS

Attachment 1: 581-022-2120 Essential Skill Assessments for English Language Learners

Oregon
Tina Kotek, Governor

OREGON DEPARTMENT OF EDUCATION
BOARD of EDUCATION

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Director, Oregon Department of Education

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Mona Khalil
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Staff
Corey Rosenberg
Executive Officer

Board Actions

Oregon State Board of Education
Regular Meeting
Board Actions
Thursday, May 16, 2024

A Regular meeting of the Board was held on Thursday, May 16, 2024 at 9:00 a.m. The meeting was held in-person at 255 Capitol Street NE, Salem, OR 97310 and via video and teleconference. All materials can be found on Board Book.

1. The State Board approved or adopted the following:

A. Prevention Education in Drugs and Alcohol Rule Update: OAR 581-022-2045
B. Senate Bill 992 (2023) Implementation: Certificate of Attendance Updates
C. Policies and Procedures Updates
D. Speech Language Stipend Program
E. House Bill 2281 (2023) Implementation: Civil Rights Coordinators
F. Audit & Other Financial Appeals-Secure Rural Schools & Communities Act: Temporary Rules
G. Regional Educator Network (REN) Request for Application: Temporary Rules

2. The State Board held a First Reading of:

A. Senate Bill 283 (2023) and Senate Bill 1552 (2024) Implementation: Mentorship Grant Program Administrative Rules Revision: OAR 581-018-0130 - 581-018-0151
B. Senate Bill 758 Implementation: OAR 581-015-2300 and 581-015-2340
C. House Bill 2696 (2023) Implementation: Sign Language Interpreter Rulemaking: OAR 581-015-2035
D. Higher Education and Career Path Skills Standards and Personal Financial Education Standards
E. 2024 Draft Social Science K-12 Standards
F. Native Hawaiian/Pacific Islander Student Success Plan Grant Program: OAR 581-017-0850 - 581-017-0875
G. Eagle Charter School Expansion Request
H. Essential Skills Assessments for English Language Learners (ELL) Technical Fix: OAR 581-022-2120
I. Substitution Requests for Instructional Materials
J. Charter School Waiver Request: Helix Charter School
K. 2024-2025 Board Leadership Nominations

6-7-2024 (EMN)

581-021-0660
Duties of and Training Requirements for Civil Rights Coordinators

(1) At a minimum, a civil rights coordinator shall:

(a) Monitor, coordinate, and oversee district compliance with state and federal laws prohibiting discrimination in public education, including ensuring the availability of, and providing to students and staff:

(A) The notice of nondiscrimination required by OAR 581-021-0045; and

(B) The district's written complaint process for making reports of discrimination.

(b) Oversee and ensure the resolution of district investigations of complaints alleging and substantiating discrimination, including the provision of remedies designed to restore and preserve equal access to an education program or activity;

(c) Provide guidance to district staff on civil rights issues in the district;

(d) Respond to questions and concerns about civil rights in the district;

(e) Coordinate efforts to prevent civil rights violations from occurring in the district; and

(f) Satisfy the training requirements listed in subsections (2) and (3) of this rule.

(2) Upon being first designated under OAR 581-021-0655, a civil rights coordinator must receive the following training in accordance with a schedule established by the Oregon Department of Education:

(a) The meaning of discrimination under state and federal nondiscrimination law, including ORS 659.850, Title VI of the Civil Rights Act of 1964, Title IX of Education Amendments of 1972, Section 504 of the Rehabilitation Act of 1973, and Title II of the Americans with Disabilities Act of 1990.

(b) The duties of districts under state and federal nondiscrimination law, including ORS 342.700 to 342.708, ORS 659.850 and 659.855, Title VI of the Civil Rights Act of 1964, Title IX of Education Amendments of 1972, Section 504 of the Rehabilitation Act of 1973, Title II of the Americans with Disabilities Act of 1990, those statutes' implementing rules and regulations, and determinations made by the Oregon Department of Education and the United States Department of Education's Office for Civil Rights.

(c) The coordinators required by Title IX of Education Amendments of 1972, Section 504 of the Rehabilitation Act of 1973, Title II of the Americans with Disabilities Act of 1990, and those coordinators' duties.

(d) Identifying discrimination and reports of discrimination.

(e) Responding to reports of discrimination.

(f) Conducting civil rights investigations, including identifying conflicts of interest, and using strategies to mitigate conflicts of interest.

(g) Preventing discrimination in public school programs and activities.

(h) Identifying retaliation taken in response to reports of discrimination, responding to reports of such retaliation, and preventing such retaliation in public school programs and activities.

(i) Tracking and documenting reports of discrimination.

(3) In years subsequent to being designated a civil rights coordinator, a civil rights coordinator must annually receive the following training in accordance with a schedule established by the Oregon Department of Education:

(a) The meaning of discrimination under state and federal nondiscrimination law, including ORS 659.850, Title VI of the Civil Rights Act of 1964, Title IX of Education Amendments of 1972, Section 504 of the Rehabilitation Act of 1973, and Title II of the Americans with Disabilities Act of 1990.

(b) The duties of districts under state and federal nondiscrimination law, including ORS 342.700 to 342.708, ORS 659.850 and 659.855, Title VI of the Civil Rights Act of 1964, Title IX of Education Amendments of 1972, Section 504 of the Rehabilitation Act of 1973, Title II of the Americans with Disabilities Act of 1990, those statutes' implementing rules and regulations, and determinations made by the Oregon Department of Education and the United States Department of Education's Office for Civil Rights.

(c) The coordinators required by Title IX of Education Amendments of 1972, Section 504 of the Rehabilitation Act of 1973, and Title II of the Americans with Disabilities Act of 1990, and those coordinators' duties.

(d) Reporting discrimination, and responding to reports of discrimination, including through complaint processes and investigations.

(4) The Oregon Department of Education annually will provide training for civil rights coordinators. Civil rights coordinators may take the department's training or may take any other training that fulfills the requirements of this rule.

Statutory/Other Authority: ORS 326, ORS 327.006, ORS 337.102, ORS 332.505, ORS 338.115 & ORS 659.855
Statutes/Other Implemented: ORS 332.505, ORS 338.115, ORS 326.051 & ORS 659.850
History:
ODE 27-2024, adopt filed 05/22/2024, effective 05/22/2024

581-021-0665
Applicability Clause

A civil rights coordinator designated under OAR 581-021-0655 before July 1, 2024, must complete the training required by OAR 581-021-0660 (2) by ~~December 31, 2024~~ June 30, 2025.

Statutory/Other Authority: ORS 326, ORS 327.006, ORS 327.102, ORS 332.505, ORS 338.115 & ORS 659.855
Statutes/Other Implemented: ORS 332.505, ORS 338.115, ORS 326.051 & ORS 659.850
History:
ODE 27-2024, adopt filed 05/22/2024, effective 05/22/2024

Oregon State Board of Education
June 13, 2024
AGENDA ITEM: 4.G.

SUBJECT: HB 2281 (2023) Implementation: Civil Rights Coordinator Technical Fix: Temporary Rules OARs 581-021-0660 and 581-021-0665 **STAFF NAME & OFFICE**: Emily Nazarov, Government and Legal Affairs Manager, Office of the Director The Board adopted rules to implement HB 2281 (2023) on May 16, 2024. Following that adoption, ODE staff filed an incorrect version of the rules with the SOS. To correct this error, ODE staff are requesting the Board readopt the rules. ☐ New Rule ☒ Amend Existing Rule ☐ Repeal Rule	☐ **First Reading** ☐ **Presentation** ☐ **No Presentation** ☒ **Action** ☒ **Temp Rule** ☐ **Presentation** ☐ **No Presentation**

BACKGROUND

House Bill 2281 was introduced at the request of the Governor on behalf of the Oregon Department of Education in the 2023 legislative session. House Bill 2281 mandated that school districts appoint a Civil Rights Coordinator. The bill was signed by the Governor July 13, 2023, and went into effect on January 1, 2024.

On May 16, 2024, ODE presented and the Board adopted final rules to implement HB 2281 (2023). The docket and proposed rules are available on the Board's online Boardbook at item 4.C. A copy of the rules is also attached to this docket as Attachment 2.

After the Board votes to adopt an administrative rule, ODE staff file the adopted version with the Secretary of State. In this case, ODE staff filed an incorrect version of the rules. As a result, the final version of the rule that is posted on the Secretary of State website is not the version of the rules that was adopted by the Board in May. This error impacts two of the rules: OAR 581-021-0660 and 581-021-0665. In order to correct the error, the Board must readopt the two rules.

ODE staff request the Board adopt the proposed temporary rules at the June meeting. This will ensure that the error is corrected quickly. ODE staff will then initiate a permament rulemaking process in the fall of 2025, thereby making the correction permanent.

SUMMARY OF PREVIOUS BOARD ACTION

The proposed rules were adopted by the State Board on May 16, 2024.

HAS THE RULE CHANGED SINCE LAST BOARD MEETING?

Oregon State Board of Education
June 13, 2024
AGENDA ITEM: 4.G.

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

EFFECT OF A "YES" OR "NO" VOTE

If the Board votes yes, ODE will be able to file the correct version of the rules as temporary rules. ODE will then initiate permanent rulemaking in the Fall of 2025.

If the Board votes no, the version of the rules that is posted on the Secretary of State's website will remain until ODE and the Board can complete permanent rulemaking in the Fall of 2025.

STAFF RECOMMENDATION

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

ATTACHMENTS

Attachment 1: Proposed temporary rules OAR 581-021-0660 and 581-021-0665 (draft dated June 7, 2024)

Attachment 2: Rules presented to the State Board on May 16, 2024

Attachment 3: Board Actions for May 16, 2024

RULEMAKING TO IMPLEMENT HOUSE BILL 2281 (2023)
03/19/2024

OAR 581-021-0650
Definitions for OAR 581-021-0650 to 581-021-0660

Under OAR 581-021-0650 to 581-021-0660;

(1) "Discrimination" has the meaning given that term in ORS 659.850.

(2) "District" means a school district or a public charter school.

(3) "Public charter school" means an elementary or secondary charter school offering a comprehensive instructional program under a written agreement entered into between a sponsor and an applicant pursuant to ORS chapter 338.

(4) "Sponsor" means:

(a) The board of the school district that has developed a written charter to create a public charter school.

(b) The State Board of Education pursuant to ORS 338.075.

Statutory/Other Authority: ORS 326, ORS 327.006, ORS 327.102, ORS 332.505, ORS 338.115 & ORS 659.855.
Statutes/Other Implemented: ORS 326.051, ORS 332.505, ORS 338.115 & ORS 659.850.

OAR 581-021-0655
Duty to Designate One or More Civil Rights Coordinators

(1) Each district must designate one or more civil rights coordinators. A civil rights coordinator designated under this rule must:

(a) Be knowledgeable of the requirements of OAR 581-0021-0038, 581-021-0045, 581-021-0046, and 581-021-0660; and

(b) Have the independence and authority necessary to carry out the provisions of OAR 581-021-0660.

(2) Each district must include the name or title, work address, email address, and phone number of each civil rights coordinator designated by the district in the notice of nondiscrimination required by OAR 581-021-0045.

(3) Each district must adopt and follow a policy for the purpose of implementing OAR 581-021-0650 to 581-021-0660. At a minimum, the policy must:

(a) List the requirements of OAR 581-021-0660 and require each civil rights coordinator designated by the district to meet those requirements.

(b) Specify that any complaint alleging discrimination may be made to any civil rights coordinator designated by the district.

(c) Require the tracking and documenting of:

(A) All reports of discrimination received by the district and all responses to those reports issued by the district, including any investigations completed and remedies provided; and

(B) The training completed by each civil rights coordinator designated by the district pursuant to OAR 581-021-0660.

(4) A civil rights coordinator designated under this rule may be a person employed by a district for purposes other than those set forth in OAR 581-021-0660.

(5) Pursuant to a contract entered into between a school district and an education service district, an education service district may designate and provide one or more civil rights coordinators for the school district. If an education service district designates and provides one or more civil rights coordinators for a school district, the education service district assumes the school district's duties under OAR 581-021-0650 to OAR 581-021-0660 to the extent that the contract delegates those duties. An education service district may designate and provide the same civil rights coordinator for multiple districts.

Statutory/Other Authority: ORS 326, ORS 327.006, ORS 327.102, ORS 332.505, ORS 338.115 & ORS 659.855.
Statutes/Other Implemented: ORS 326.051, ORS 332.505, ORS 338.115 & ORS 659.850.

OAR 581-021-0660
Duties of and Training Requirements for Civil Rights Coordinators

(1) At a minimum, a civil rights coordinator shall:

(a) Monitor, coordinate, and oversee district compliance with state and federal laws prohibiting discrimination in public education, including ensuring the availability of, and providing to students and staff:

(A) The notice of nondiscrimination required by OAR 581-021-0045; and

(B) The district's written complaint process for making reports of discrimination.

(b) Oversee and ensure the resolution of district investigations of complaints alleging and substantiating discrimination, including the provision of remedies designed to restore or preserve equal access to an education program or activity.

(c) Provide guidance to district staff on civil rights issues in the district;

(d) Respond to questions and concerns about civil rights in the district;

(e) Coordinate efforts to prevent civil rights violations from occurring in the district; and

(f) Satisfy the training requirements listed in subsections (2) and (3) of this rule.

(2) Upon being first designated under OAR 581-021-0655, a civil rights coordinator must receive the following training in accordance with a schedule established by the Oregon Department of Education:

(a) The meaning of discrimination under state and federal nondiscrimination law, including ORS 659.850, Title VI of the Civil Rights Act of 1964, Title IX of Education Amendments of 1972, Section 504 of the Rehabilitation Act of 1973, and Title II of the Americans with Disabilities Act of 1990.

(b) The duties of districts under state and federal nondiscrimination law, including ORS 342.700 to 342.708, ORS 659.850 and 659.855, Title VI of the Civil Rights Act of 1964, Title IX of Education Amendments of 1972, Section 504 of the Rehabilitation Act of 1973, Title II of the Americans with Disabilities Act of 1990, those statutes' implementing rules and regulations, and determinations made by the Oregon Department of Education and the United States Department of Education's Office for Civil Rights.

(c) The coordinators required by Title IX of Education Amendments of 1972, Section 504 of the Rehabilitation Act of 1973, Title II of the Americans with Disabilities Act of 1990, and those coordinators' duties.

(d) Identifying discrimination and reports of discrimination.

(e) Responding to reports of discrimination.

(f) Conducting civil rights investigations, including identifying conflicts of interest, and using strategies to mitigate conflicts of interest.

(g) Preventing discrimination in public school programs and activities.

(h) Identifying retaliation taken in response to reports of discrimination, responding to reports of such retaliation, and preventing such retaliation in public school programs and activities.

(i) Tracking and documenting reports of discrimination.

(3) In years subsequent to being designated a civil rights coordinator, a civil rights coordinator must annually receive the following training in accordance with a schedule established by the Oregon Department of Education:

(a) The meaning of discrimination under state and federal nondiscrimination law, including ORS 659.850, Title VI of the Civil Rights Act of 1964, Title IX of Education Amendments of 1972, Section 504 of the Rehabilitation Act of 1973, and Title II of the Americans with Disabilities Act of 1990.

(b) The duties of districts under state and federal nondiscrimination law, including ORS 342.700 to 342.708, ORS 659.850 and 659.855, Title VI of the Civil Rights Act of 1964, Title IX of Education Amendments of 1972, Section 504 of the Rehabilitation Act of 1973, Title II of the Americans with Disabilities Act of 1990, those statutes' implementing rules and regulations, and determinations made by the Oregon Department of Education and the United States Department of Education's Office for Civil Rights.

(c) The coordinators required by Title IX of Education Amendments of 1972, Section 504 of the Rehabilitation Act of 1973, and Title II of the Americans with Disabilities Act of 1990, and those coordinators' duties.

(d) Reporting discrimination, and responding to reports of discrimination, including through complaint processes and investigations.

(4) The Oregon Department of Education annually will provide training for civil rights coordinators. Civil rights coordinators may take the department's training or may take any other training that fulfills the requirements of this rule.

Statutory/Other Authority: ORS 326, ORS 327.006, ORS 327.102, ORS 332.505, ORS 338.115 & ORS 659.855.
Statutes/Other Implemented: ORS 326.051, ORS 332.505, ORS 338.115 & ORS 659.850.

OAR 581-021-0665
Applicability Clause

A civil rights coordinator designated under OAR 581-021-0655 before July 1, 2024, must complete the training required by OAR 581-021-0660 (2) by June 30, 2025.

Statutory/Other Authority: ORS 326, ORS 327.006, ORS 327.102, ORS 332.505, ORS 338.115 & ORS 659.855.
Statutes/Other Implemented: ORS 326.051, ORS 332.505, ORS 338.115 & ORS 659.850.

OAR 581-021-0045 (Amended)
Discrimination Prohibited

(1) For purposes of this rule and OAR 581-021-0046:

(a) "Disability" includes a person who has a physical or mental impairment that substantially limits one or more major life activities, a person who has a history or record of such impairment, or a person who is perceived by others as having such an impairment.

(b) "Discrimination" means any act that ~~that~~ unreasonably differentiates treatment, intended or unintended, or any act that is fair in form but discriminatory in operation, either of which is based on age, disability, national origin, race, color, marital status, religion, sex, sexual orientation, or gender identity;

(c) "District" means:

(A) A school district, an education service district, a public charter school, a Youth Corrections Education Program provider under contract with the department, a Juvenile Detention Education Program provider under contract with the department, or a program that receives moneys pursuant to ORS 343.243; and

(B) Any educational agency, program, or service under the jurisdiction of an entity described in subparagraph (A) of this paragraph.

(d) "National origin" includes:

(A) An individual's or individual's parent's or guardian's actual or perceived place of origin;

(B) Latinx/a/o/e and other protected class ethnicities, including Afro-Latinx/a/o as defined in OAR 581-017-0693, Central American as defined in OAR 581-017-0693, Indigenous as defined in OAR 581-017-0693, and South American as defined in OAR 581-017-0693;

(C) An individual's actual or perceived religious or cultural ancestry that the individual associates with their personal identity;

(D) Physical characteristics that are historically associated with a place of origin, protected class ethnicity, or religious or cultural ancestry, including but not limited to individuals who identify as Syrian, Muslim, Middle Eastern, Arab, Sikh, and Jewish; and

~~(E))~~ **(E)** An individual whose first spoken language is not English or who is not proficient in speaking English or who is under the custody of a parent or guardian whose first spoken language is not English or who is not proficient in speaking English.

(e) "Gender identity" means an individual's gender-related identity, appearance, expression**,** or behavior, regardless of whether the identity, appearance, expression**,** or behavior differs from that associated with the gender assigned to the individual at birth.

(f) “Protective hairstyle” means a hairstyle, hair color, or manner of wearing hair that includes, but is not limited to, locs, twists, and braids, regardless of whether the braids are created with extensions or styled with adornments.

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

(h) “Race” includes:

(A) Black, African American, American Indian, Alaska Native, Asian, Native Hawaiian, Pacific Islander, other protected races, and multiracial individuals; and

(B) Physical characteristics that are historically associated with race, including but not limited to any natural hair, hair texture, hair type, or protective hairstyle associated with race.

(i) “Sex” includes male (M), female (F), and non-binary (X).

(j) “Sexual orientation” means an individual’s actual or perceived heterosexuality, homosexuality, or bisexuality.

(k) “Sponsor” means:

(A) The board of the common school district or the union high school district in which the public charter school is located that has developed a written charter to create a public charter school.

(B) The State Board of Education pursuant to ORS 338.075.

(2) A person in Oregon may not be subjected to discrimination in any public elementary or secondary school, educational program or service, or interschool activity where the program, service, school, or activity is financed in whole or part by monies appropriated by the **Oregon** Legislative Assembly.

(3) In providing programs or services to students, a district may not, on a discriminatory basis as defined in subsection (1)(a) of this rule:

(a) Treat one person differently from another in determining whether such person satisfies any requirement ~~of~~ **or** condition for the provision of ~~such~~ **an** aid, benefit, or service;

(b) Provide different aid, benefits, or services, or provide aids, benefits, or services in a different manner;

(c) Deny any person ~~such~~ **an** aid, benefit, or service;

(d) Subject any person to separate or different rules of behavior, sanctions, or other treatment;

(e) Aid or perpetuate discrimination by joining or remaining a member of any agency or organization which discriminates in providing any aid, benefit, or service to students or employees;

(f) Otherwise limit any person in the enjoyment of any right, privilege, advantage, or opportunity.

(4)(a) A district must issue notice of nondiscrimination for the purpose of notifying students, staff, and third parties that the district does not discriminate on the basis of age, disability, national origin, race, color, marital status, religion, sex, sexual orientation, and gender identify.

(b) Notice of nondiscrimination as required by this subsection must:

(A) Be continuously available on the district website, accessible either by a direct link on the front page of the website or by a direct link on the footer of every page of the website.

(B) Be posted in multiple locations, including but not limited to public-facing documents such as staff and student handbooks, annual publications, official school board documents, bulletins, graduation announcements, catalogs, recruitment materials, and school related applications.

(C) Be made available in the languages of the communities served by the district.

(D) Be disseminated annually to staff, students, and families of students as an individual notice that is accessible and written in plain language.

(E) Contain:

(i) A statement of nondiscrimination that specifies the basis for nondiscrimination being age, disability, national origin, race, color, marital status, religion, sex, sexual orientation, and gender identity;

(ii) The contact information of ~~staff designated to respond to questions of discrimination~~ **each civil rights coordinator designated pursuant to OAR 581-021-BBBB and each coordinator designated pursuant to Title IX of Education Amendments of 1972, Section 504 of the Rehabilitation Act of 1973, and Title II of the Americans with Disabilities Act of 1990**, including their name or title, **work** address, email address, and telephone number; and

(iii) A link to or the web address for the district's discrimination complaint process and procedures.

(5) This rule does not affect attendance boundaries, limit placement of students in programs of desegregation, nor supersede any specific statutory requirement for any educational program.

Statutory/Other Authority: ORS 326 & 659.855
Statutes/Other Implemented: ORS 326.051 & 659.850
History:

ODE 8-2023, amend filed 03/29/2023, effective 03/29/2023
ODE 39-2021, amend filed 12/29/2021, effective 12/29/2021
ODE 11-2019, amend filed 03/25/2019, effective 03/25/2019
ODE 13-2008, f. & cert. ef. 5-23-08
1EB 11-1984, f. & ef. 4-17-84
1EB 252, f. & ef. 9-30-76

OAR 581-002-0003 (Amended)
Scope

OAR 581-002-0001 to OAR 581-002-0023 apply to appeals of complaints alleging:

(1) A violation of ORS 339.285 to 339.303 or OAR 581-021-0570 (Restraint and Seclusion);

(2) A violation of ORS 659.850 or OAR 581-0210045 to 581-021-0046 (Discrimination **Prohibited** and Program Compliance Standards for Purposes Related to Discrimination) **or OAR 581-022-2312 (Every Student Belongs)**;

(3) If the entity against whom the complaint is filed is a school district, education service district, or public charter school, a violation of OAR 581-021-0038 (Requirements Related to Sexual Harassment)**;**

(4) If the entity is a school district or a public charter school, or an education service district that has entered into a contract with a school district for the purpose of designating and providing for the school district one or more civil rights coordinators, OAR 581-021-BBBB and CCCC (Duty to Designate One or More Civil Rights Coordinators and Duties of and Training Requirements for Civil Rights Coordinators);

~~(4)~~ **(5)** If the entity that is the subject of the complaint is a school or program operated by a school district, education service district, or public charter school, a violation of OAR 581-021-0047 (Prohibition against Using Native American Mascot);

~~(5)~~ **(6)** If the entity against whom the complaint is filed is a school district, an education service district, a Youth Corrections Education Program provider under contract with the department, or a program that receives money pursuant to ORS 343.243 (3) or (4), a violation of ORS 659.852 (Retaliation); **or**

~~(6)~~ **(7)** A violation of the Oregon Administrative Rules, chapter 581, division 022 (Division 22 Standards).

Statutory/Other Authority: ORS 326.051, ORS 339.303 & ORS 659.850 to 659.855
Statutes/Other Implemented: ORS 339.303, ORS 659.850 to 659.855 & ORS 339.285 to 339.303
History:
ODE 8-2023, amend filed 03/29/2023, effective 03/29/2023
ODE 11-2019, adopt filed 03/25/2019, effective 03/25/2019

2024 Social Science Standards

In June of 2024, the State Board of Education is scheduled to adopt Oregon's updated K-12 Social Science Standards that outline the knowledge and skills students are expected to attain in the areas of history, geography, civics, and economics at each grade level from kindergarten through high school.

Related Laws & Legislative History

The new standards also address several recent laws from the Oregon Legislature and Governor, including ethnic studies, and Holocaust and genocide education:

- 2017: Senate Bill 2845/SB 2023 Ethnic Studies (ORS 329.045)
  - Inclusion of ethnic studies in the K-12 social science standards.
  - Instructional materials supportive of integrated social science standards
- 2018: Senate Bill 664 Holocaust and Other Genocides (ORS 329.494)
  - Requires K-12 education about the Holocaust and other genocides
  - Guidance documents provided to address Holocaust and genocide concepts.
- 2021: SB 513/SB702 Civics Education (ORS 329.045)
  - Requires a .5 credit and course for US Government and Civics for Oregon diploma
  - Social science standards to emphasize civics education
- 2023: Senate Bill 2905 Expanding Ethnic Studies (ORS 329.045)
  - Adds Jewish descent to groups included in ethnic studies

Timeline for Implementing Social Science Standards

- **Spring 2024** - Review public feedback
- **Summer 2024** - Standards proposed adopted by the State Board of Education
- **Fall 2024** - Instructional materials evaluation criteria informed by engagement adopted by the State Board of Education. ODE will then work with social science publishers and will convene an evaluation committee to review social science materials for the state approved list.

All school districts in Oregon will be required to implement the new Social Science Standards by the academic year 2026-2027.

More Information

Visit Oregon's Social Science Standards webpage.

Contact us with questions at ODE.SocialScience@ode.oregon.gov

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Social Science Frequently Asked Questions

Q. What is social science?

A. In Oregon, Social science includes the disciplines of geography, history, civics, and economics. Social science examines and explains historical developments, political structures, social interactions, cultural norms, geographic systems, and economic exchange through research, analysis, and theoretical frameworks. Social science can also sometimes be referred to as social studies.

Q. What are Oregon's Social Science Standards?

A. Oregon's Social Science Standards outline the knowledge and skills students attain in the domains of history, geography, civics, and economics at each grade level, K-12.

Q. Are Ethnic Studies included in the Social Science Standards?

A. Yes. Oregon HB2845 defined ethnic studies as including the histories, contributions, and perspectives of traditionally underrepresented individuals and groups. Since 2021, the social science standards have included these concepts and perspectives to provide a more complete understanding of history, civics, economics, and civics.

Q. Do the standards create an ethnic studies course?

A. No. Students engage with ethnic studies concepts within their regular social science curriculum. School districts may decide to offer additional coursework as electives building on the learning from the required standards.

Q. Does Oregon require teaching on the Holocaust and other genocides?

A. Yes. Holocaust and Other Genocide Education is mandated by Senate Bill 644, ensuring that students learn about historical atrocities such as the Holocaust and other

genocides. Concepts related to Holocaust and genocide education are included in the Social Science Standards.

Q. How are the social science standards related to Tribal History/Shared History

A. The Tribal History/Shared History lesson plans support the teaching of the **Essential Understandings of Native Americans in Oregon**. Lessons are offered throughout K-12 in English Language Arts, Math, Science, Health, and Social Science. The 2024 Social Science standards include specific references to the Tribal History/Shared History lessons.

Q. How are teachers supported in implementing these standards?

A. Teachers are supported through resources, professional development opportunities, and ongoing guidance provided by Oregon's Open Learning platform, the Oregon Department of Education's Social Science webpage, and monthly newsletters. Additionally, Senate Bill 1050 allocates resources to create professional learning specifically designed to support social science educators in the implementation of Ethnic Studies as well as Holocaust and genocide studies.

Q. When will the revised Social Science Standards be adopted?

A. The Social Science Advisory Panel is responsible for reviewing and revising the standards on a seven-year adoption cycle. A draft of the standards is shared with the public for review and feedback before a presentation to the State Board of Education. The current timeline includes the adoption by the State Board of Education of the revised standards in June 2024.

Q. How were the 2024 Social Science Standards created?

A. *A Social Science Teacher Advisory Panel reviewed and offered revisions to the 2021 Social Science Standards. Community groups, educators, and the public provided additional comments and feedback before the State Board of Education reviewed and approved the 2024 Social Science Standards.*

Q. Are all school districts required to implement the Social Science Standards?

A. Yes. All school districts in Oregon must implement the Social Science Standards by the academic year 2026-2027.

Q. How can community partners get involved in supporting these initiatives?

A. Community partners can support these initiatives by providing feedback on curriculum materials, and collaborating with educators and policymakers to promote culturally responsive teaching practices.

Q. Where can I find more information about Oregon's Social Science Standards and related initiatives?

A. Resources supporting Oregon's Social Science Standards, Ethnic Studies integration, Holocaust and genocide education, and professional development opportunities are available on the Oregon Department of Education's website, social science webpages, and through the Oregon Open Learning platform.

Oregon State Board of Education
June 13, 2024
AGENDA ITEM: 4.G.

Summary

SUBJECT: 2024 Inclusive Social Science Standards **STAFF NAME & OFFICE**: Office of Teaching and Learning Amit Kobrowski Alexa Pearson The Oregon Department of Education collaborates with K-12 educators, administrators, and educational partners to foster positive and inclusive learning environments for all students. In response to legislative requirements, the 2018 Social Science Standards and the optional 2021 Ethnic Studies Integrated Social Science Standards underwent thorough review and revision. The resulting Draft 2024 Social Science Standards reflect inclusivity and incorporate legislatively mandated additions. Throughout the review process, ODE received valuable input to ensure the standards meet the diverse needs of Oregon's students. Upon adoption by the State Board of Education, school districts will implement these standards for the 2026-2027 school year.	☒ **Second Reading** ☐ **Presentation** ☒ **No Presentation**

BACKGROUND

Empowering students with a more complete history is essential for cultivating an informed, engaged citizenry prepared to uphold the pillars of our pluralistic democracy. High-quality social science education equips young minds with an understanding of government, economics, and geography, and the critical thinking skills to analyze diverse perspectives and experiences that have shaped our society. Recent legislation in Oregon recognizes these standards as a crucial catalyst for transforming classroom instruction and ensuring all students gain access to a more complete historical narrative that reflects our state's rich tapestry of cultures and identities.

Development of the 2024 Standards

In 2017, Oregon passed House Bill 2845, which initiated the exploration and proposal of adding ethnic studies content into existing K-12 social science standards. In January of 2020, a panel of K-12 teachers utilized the ethnic studies advisory group report to integrate ethnic studies standards into the K-12 Social Science Standards. In February 2021, the State Board of Education adopted the 2021 Social Science Standards Integrated with Ethnic Studies. The 2021 Social Science Standards remained optional as most school districts had

recently implemented the 2018 standards with corresponding instructional material adoptions. School districts intending to use the optional 2021 standards independently identified instructional materials and teacher professional learning needs. However, the shift to remote learning and the challenges of delivering high-quality learning online limited the ability of school districts to implement the 2021 standards.

In alignment with the seven-year cycle for instructional material adoption, the Oregon Department of Education announced the opportunity for K-12 educators to join an educator advisory panel for the Social Science Standards review and revision process in April 2023. The selected panel includes thirty-five educators from across Oregon. Advisory panel members represent K-2, 3-5, 6-8, and high school educators, including ethnic studies educators who previously implemented ethnic studies in California. This advisory panel aimed to translate recent legislative mandates into academic standards and develop clear, comprehensive guidelines for educators.

In the seven years since the previous comprehensive review and revision of the Social Science Standards, the Oregon legislature enacted several significant initiatives requiring updates to the K-12 Social Science content standards. The panel reviewed recent legislation to better understand how to meet both the requirements and spirit of creating a more complete understanding of the past with a wider perspective on today's world.

Using the optional 2021 Social Science Standards integrated with Ethnic Studies as a framework, the advisory panel identified opportunities to incorporate the histories and perspectives of underrepresented groups identified in ORS 329.045, address learning concepts related to the Holocaust and other genocides as outlined in SB 664, and enhance civics education mandated by SB 513 and SB 702.

In addition to a review of Oregon's legislation, the panel explored guidance from the National Council of Social Studies and numerous social science standards examples from other states with recent standards adoptions. This exploration of national guidance and standards from across the United States helped the advisory panel identify new possibilities of how the format and structure of Oregon's standards could be redesigned to provide greater clarity of the social science learning expectations for educators, parents, community members, and students.

Engagement

Prior to considering revisions, the panel engaged with the Oregon Historical Society to identify opportunities for students and classroom teachers to explore local examples of the individuals and groups often underrepresented in traditional approaches to social science. The panel also worked with the Oregon Jewish Museum and Center for Holocaust Education to inform the writing of standards required by Senate Bill 664.

The Office of Indian Education reviewed the initial draft version of the 2024 Standards, providing crucial feedback. Additional engagement sessions on subsequent versions with members of the Educators Advancement Council, Students Success Coordinators, and the Office of Education, Innovation, and Improvement ensured greater inclusion of historically underrepresented groups, and language was clarified and sharpened for classroom educator implementation.

Before release for public comment, ODE shared the current draft with educators from colleges and universities, COSA Equity Directors, students, Community-Based Organizations, instructors of teacher preparation programs, and pre-service teachers. The feedback survey remained open until May 6th, with an additional student engagement planned prior to sharing the finalized standards at the June State Board of Education session.

New Additions to the 2024 Draft Standards

- **Content-specific examples**: Classroom educators consistently requested additional clarification and examples within the standards document for points of reference when designing learning opportunities for students.
- **New standards for K-5**: 2021 standards occasionally included cumbersome language or multiple ideas within one standard. In these cases, providing clarification required splitting concepts into two standards or reframing the standard.
- **Learning concepts for each domain:** Previous standards only included domains (History, Civics, Geography, and Economics). Including learning concepts within each domain helps educators design long-term learning.
- **Middle school flexibility:** Standards allow for school districts to determine a chronological, geographic, or thematic approach to grade 6 and 7 social science.
- **Incorporation of Holocaust/genocide learning objectives:** SB 664 introduced nine learning objectives for integration into K-12 social science standards.
- **New Civics standards:** SB 513 requires school districts to offer a standalone .5 credit course for civics as part of the 24 diploma credits. SB 702 requires a more robust approach to K-12 civics standards.
- **Tribal History/Shared History lessons integrated:** Senate Bill 13 created required lesson plans for social science, language arts, math, science, and health. Standards now include direct links to Tribal History/Shared History lessons for ease of teacher access.

- **Adjustments to Financial Literacy**: With the passage of Senate Bill 3, the high school financial literacy standards are no longer a component of the Social Science Standards. The K-8 standards retain personal finance standards as part of economics.
- **Transformational Social Emotional Learning**: The standards include guidance and connections for the inclusion of the recently adopted TSEL standards.
- **Introduction to the standards**: Includes relevant legislation and guiding principles explaining Oregon's approach to social science. Definitions of "Inclusive Social Science" and "traditionally underrepresented" are included for clarity and reference.
- **Identification and description of Disciplinary Practices**- The introduction to the 2024 Social Science Standards now includes ten disciplinary practices integrated throughout the standards at each grade-level.

SUMMARY OF PREVIOUS BOARD ACTION

In February 2021, the Oregon State Board of Education adopted the Oregon K-12 Social Science Standards Integrated with Ethnic Studies. On May 16, 2024, ODE provided a first read of the 2024 Draft Social Science Standards. This is the second read of the Draft Social Science Standards.

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

The first read to the State Board of Education included a presentation from ODE and questions and comments from Board Members. Board members shared concerns about teacher and community readiness and additional components to support the implementation of the standards in the 2026-2027 school year. ODE will continue to address these concerns as the standards are introduced and implemented by reviewing and evaluating instructional materials aligned to the standards, providing professional learning, and publishing supplemental resources and guidance.

During the May State Board of Education meeting, the Jewish Federation of Portland offered testimony on concerns about standard 6/7.H.CP.11. In responding to these concerns, ODE hosted additional engagements with the Jewish Federation of Portland and other educational organizations before finalizing the language of the standard. In response to feedback, a new clarification of antisemitism was added in standard 6/7.H.CP.11.

Previous Standard 6/7.H.CP11	**Revised Standard 6/7.H.CP.11**
Investigate the historical origins and modern manifestations of anti-Judaism. *Note: Anti-Judaism refers to the bias, discrimination, and violence experienced by Jewish individuals and communities throughout history. ~~Antisemitism refers to the more modern pseudo-scientific attempt to justify anti-Judaism based on culture, ethnicity, or race.~~*	Investigate the historical origins and modern manifestations of anti-Judaism. *Note: Anti-Judaism refers to the bias, discrimination, and violence experienced by Jewish individuals and communities throughout history primarily rooted in religious identity. Antisemitism is the prejudice, discrimination, hostility, or violence directed toward Jewish people or communities and their religious, cultural, and ethnic identity.*

Additional feedback and changes since the first reading of the standards included an engagement on May 24, 2024.ODE presented at the Youth Ethnic Studies Conference to share information on the draft standards and gather perspectives from middle and high school students. The students were eager to see the new standards in their classrooms. They offered important insights for teaching considerations, including the importance of elementary school foundations and the positive, strengths-based portrayal of underrepresented groups.

The most recent draft of the standards now includes an expanded introduction for clarifications on Social Science Disciplinary Practices, connections to literacy practices, and an introduction for each grade level in response to educator requests.

POLICY ISSUES OR CONCERNS

The 2024 Social Science Standards reflect a comprehensive effort to address legislative mandates, feedback from educators, guidance from other states, student input, perspectives from community organizations, and public comments.

While aiming to provide a more inclusive and robust social science experience, the updated standards incorporate adjustments and additions that some may question. These include a greater emphasis on ethnic studies, revised learning objectives related to historically marginalized groups, and explicit references to resistance, resilience, and oppression within and among many communities. The updated standards intentionally guide classroom instruction to investigate diverse experiences and equip students with the

knowledge for critical analysis of the complex stories and systemic factors that have shaped our pluralistic democracy.

The State Board should be aware of three challenges for school districts as the new standards are implemented in the 2026-2027 school year.

Inclusive Standards

Shifting the narrative and revealing new narrators, the 2024 standards continue the inclusive intent of the 2021 standards with specific content examples naming often overlooked or unexplored experiences. The teaching and sharing of traditionally underrepresented histories, contributions, and perspectives, may require additional support for educators to build relevant knowledge and content dexterity. Senate Bill 1050 provides funding for the Oregon Department of Education to facilitate state-wide professional learning for K-12 educators on the Holocaust and other genocides and ethnic studies.

The K-12 standards prompt students to explore the influence of gender, race, ethnicity, sexual orientation, religion, class, and disability on laws, policies, and social interactions. The acknowledgment and teaching of the significance of "identity" garnered negative and positive public feedback. For readability, the listing of identity groups, as named in HB2845 "Ethnic Studies" are no longer repeated in each standard. However, identity remains a significant concept in the 2024 Standards.

Number of Standards

When necessary, standards with multiple concepts and skills were separated for purposes of instruction and assessment while maintaining crucial skills or content. Although creating an overall increase in the total number of standards, each standard is streamlined, and grade-level scope remains similar to previous standards. During public comment, classroom educators noted the addition of standards. The number of standards in each grade level places Oregon's Social Science Standards in a similar range to other state standards.

Implementation Challenges

Since 2016 Oregon adopted seven laws adding significant new content and areas of focus to the K-12 Social Science Standards. The 2024 Standards reflect the new legislative

requirements and help to clarify the learning expectations for students. However, full implementation as intended will entail several challenges:

- Limited time and the underteaching of social science in K-5. Although research supports the full inclusion of social science for improving reading outcomes, on the public survey, classroom educators reported a lack of time and support for social science instruction.

- The addition of the histories, contributions, and perspectives of traditionally underrepresented groups and individuals in the standards represents new learning for many classroom educators. Senate Bill 1050 provides funding for state-wide professional learning and the creation of resources and online learning modules to help build educator capacity. These professional development opportunities are optional for school districts.

- Oregon's ethnic studies legislation creates an expansive definition of social and ethnic groups to be included in the social science standards. Creating balance in addressing the history and perspective of each of the defined groups is dependent on teacher knowledge and high-quality instructional materials aligned to the 2024 standards.

- Standards create a baseline and a framework for building student knowledge and skills. They do not create a curriculum or lessons. School districts and classroom educators retain the ability to utilize instructional materials, create curriculum, implement lessons, and establish courses that strengthen these standards and allow students to explore relevant learning.

EQUITY IMPACT ANALYSIS

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. Research on culturally responsive classrooms and instruction consistently indicates that students with a sense of belonging in school have improved learning outcomes. Providing inclusive standards facilitates the understanding of one's own life as well as others' lived experiences and perspectives, creating a more complete understanding of the factors that shape our world.

FISCAL ANALYSIS

Once these standards are adopted by the State Board, the Oregon Department of Education will utilize funding provided by SB 1050 to develop and facilitate professional learning for K-12 educators. Districts will have costs related to implementation such as the adoption process and purchase of instructional materials aligned to the new standards, time for professional learning and implementation.

ATTACHMENTS

Attachment 1: 2024 Standards V.9
Attachment 2: 2024 Overview of Standards

2024 Oregon DRAFT Social Science Standards

K-12 Social Science Public Draft Version

Standards Version 10.0
Version Update: June 7, 2024

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I. Revisions and Additions for 2024

The 2024 Oregon Social Science Standards represent a significant revision from the 2018 Standards. These new standards reflect current educational best practices and the importance of embracing a more complete approach to history, geography, economics, and civics with the inclusion of traditionally underrepresented experiences and perspectives. Compared to previous versions from 2018 and 2021, the new standards feature:

- A restructured format based on educator feedback, improving usability and alignment with classroom needs.
- The inclusion of specific examples to provide clarification and content suggestions to support instruction and curriculum planning.
- New requirements mandated by recent legislation, including civics, ethnic studies, the Holocaust, and other genocides.

These revamped standards offer a relevant and nuanced framework for social science education in Oregon. The updated content prioritizes critical analysis, cultural awareness, and preparation for engagement in a pluralistic democracy and an increasingly interconnected world.

II. Social Science Domains and Concepts

The social science standards include four main content domains: civics, geography, economics, and history. The domains include four concepts to assist teachers and students in understanding the main ideas of each domain.

Domain 1: Civics (C)

Code	Concept
C.PI	Political Institutions
C.IR	Identity, Roles, Responsibilities
C.DP	Democratic Principles
C.CE	Civic Engagement

Domain 2: Geography (G)

Code	Concept
G.GR	Geographic Reasoning
G.MM	Migration and Movement
G.HI	Human Interaction and Interconnections
G.HE	Human Environmental Interaction

Domain 3: Economics (E)

Code	Concept
E.ES	Earning, Saving, and Spending
E.MI	Micro and Macro Economics
E.IC	Incentives, Choice, and Consumer Behavior
E.ST	Specialization, Trade, Interdependence

Domain 4: History (H)

Code	Concept
H.CH	Continuity and Change
H.CC	Conflict and Cooperation
H.CE	Cause and Effect
H.CP	Communities and Pluralism

III. Essential Disciplinary Practices

The social sciences expand our perspectives and change how we understand the human experience. Examining the intricate relationships between individuals, communities, and societies provides vital knowledge for navigating our increasingly interconnected world. Effective social science instruction transcends rote memorization and cultivates practices that promote inquiry, critical thinking, cultural understanding, and helps young people make informed and reasoned decisions for the public good as citizens of a diverse, democratic society in an interdependent world.[1]

The ten Essential Disciplinary Practices outlined below provide a framework for teaching the social sciences. By emphasizing skills like chronological reasoning, seeking diverse viewpoints, combating digital misinformation, and empathizing with a range of identities and lived experiences, the practices help students become informed and empowered agents of change.

These practices, integrated with the grade-level standards, equip students with content knowledge and skills to address systemic injustices, advocate for a more equitable world, and uphold the aspirational ideals of our democratic society.

Essential Disciplinary Practices	Explanation
Develop questions for social science inquiry.	Instruction that empowers students to generate questions can spark curiosity, identify knowledge gaps, and help students examine their assumptions. When students pose questions and consider other perspectives, they are engaged in higher-order thinking skills like analysis, evaluation, and synthesis. Considering open-ended questions about past and present societies reinforces the vital social science skills of problem identification, issue framing, and proposing solutions.
Use chronological thinking skills, connecting the past with the present to recognize continuity and change in human history.	Understanding chronology and placing events in sequence is fundamental for students to create meaning in the social sciences and allows them to appreciate the development of and changes in traditions and institutions, as well as the identification of significant turning points and transformations. By analyzing continuities and changes over time, students identify examples of consistency, gradual evolution, and dynamic transformations.
Collect, interpret, evaluate, and apply information from primary and secondary sources to better understand and create historical narratives distinguishing between fact and opinion.	When educators introduce primary and secondary sources, students uncover vital evidence for constructing historical narratives and understanding social phenomena. By analyzing these sources, students cultivate higher-order skills like contextualizing evidence, evaluating credibility by accounting for inherent biases and distortions, corroborating across sources, and distinguishing factual claims from opinions.

[1] National Council for the Social Studies: National Curriculum Standards for Social Studies.

Essential Disciplinary Practices	Explanation
Seek and analyze diverse perspectives to develop a more complete understanding of past and current events.	Instruction that includes multiple diverse perspectives can provide nuance and complexity to investigating and understanding past and present societal issues. Students cultivate critical thinking by evaluating varied reasoning and worldviews. Student ability to understand and engage respectfully with differing experiences and perspectives is crucial for sustaining a pluralistic democracy.
Evaluate and assess how discrimination, racism, and inequality shape historical narratives, individual perspectives, intersecting identities, and diverse understandings of the past and present.	Educators provide instruction that helps students recognize how systemic bias, discrimination, and racism often shape traditional narratives. This allows students to evaluate and critique dominant histories, as well as explore the effects of intersecting identities. As students analyze marginalization, they cultivate empathy for diverse lived experiences.
Construct well-reasoned and logically coherent explanations, arguments, and solutions related to complex societal issues.	An important objective of social science education is for students to synthesize credible information and evidence from diverse sources and perspectives to form well-reasoned and coherent arguments and propose solutions to complex societal issues. By anticipating counterarguments, considering implications, and including valid evidence and reasoning in their writing and discussions, students reinforce critical thinking skills and promote continued inquiry.
Cultivate global awareness and cultural understanding to effectively engage with the interconnected world, diverse cultures, and perspectives.	Events, issues, and decisions in one part of the world have far-reaching ripple effects across nations and cultures. Developing global awareness helps students contextualize their local community and cultural experiences as part of an interconnected human story. Bridging cultural divides enhances social cohesion, civic engagement, and inclusive decision-making - cornerstones of a thriving pluralistic democracy.
Demonstrate empathy to understand how identities shape actions of resistance and resilience among individuals and communities.	Effective social science instruction cultivates respect for diverse aspects of identity such as gender, race, ethnicity, sexual orientation, religion, socioeconomic class, and disability. The standards support students in developing an understanding of the immense strengths demonstrated by communities striving for equity despite systemic barriers. Evaluating the motivations and contexts of resistance movements, protests, and everyday resilience requires students to appreciate the inequities and challenges faced by traditionally underrepresented individuals and groups.
Develop the necessary skills to critically analyze and evaluate digital and social media content, identify reliable sources, and become more informed and responsible digital citizens.	Social science instruction in digital citizenship equips students with foundational skills for our highly connected, technologically driven world. To participate responsibly in the digital realm, students apply critical thinking tools to recognize and advocate against digital misinformation, hate speech, harassment, and other unhealthy online behaviors undermining democracy. Digital citizenship skills promote creating positive, safe, legal, and ethical digital content.

Essential Disciplinary Practices	Explanation
Apply the practices and knowledge of social science to determine the most effective ways to take informed civic action.	The social science instruction aims to support citizens to actively engage in addressing society's greatest challenges. It encourages taking informed action for tangible civic application. Students utilize vital skills such as evidence-based decision-making, analysis of local and global issues, strategic planning for change, and democratic collaboration. When students apply social science knowledge and skills, they cultivate dispositions and actions demonstrating civic responsibility, ethical leadership, stewardship, and communal improvement. Through rigorous inquiry leading to real-world application and outcomes students can advocate for a more just and sustainable democratic society.

IV. Transformative SEL and Social Science Instruction

Oregon's Transformative Social Emotional Learning Framework and Standards offer essential guidance in helping districts and classroom educators establish caring, nurturing, and active social science learning environments. Transformative Social Emotional Learning can be readily integrated with the ten Essential Disciplinary Practices for Social Science and help support a classroom climate to allow the exploration and discussion of complex histories. For social and emotional learning to be transformative, the practices and approaches require setting the conditions for nurturing and attending to personal and collective well-being during social science learning. It includes:

- Culturally responsive practices that affirm and honor students' ways of being, skill development in understanding cultural differences, and honoring students' unique strengths, perspectives, and contributions.
- Systemic approaches that consider the role and impact of the broader society and the learning environment on students' behavior and how this impacts the ways students view themselves.
- Providing students with opportunities to reflect upon and understand the root causes of emotions related to our biases, stereotypes, prejudices, and discrimination.
- Nurturing student agency and voice (including non-verbal ways to communicate) as necessary parts of the educational process, supporting students to take actions that challenge and change systems.

V. Inclusive Social Science: Expanding the Narrative

Throughout the K-12 standards, students investigate how gender, race, ethnicity, sexual orientation, religion, class, and disability often shape laws, policies, and other social interactions.

Teachers should include culturally relevant examples of the histories, contributions, and perspectives of traditionally underrepresented individuals and groups, including individuals who are American Indian/Alaska Native/Native Hawaiian, Americans of African, Asian, Pacific Island, Chicano, Latino, Middle Eastern or Jewish descent, immigrants, or refugees, of various religious identities, lesbian, gay, bisexual, transgender, and other traditionally underrepresented groups.

Throughout the standards, the phrase "traditionally underrepresented groups/individuals" includes the above groups and reflects the legislative requirement of ORS 329.045 and OAR 581-022-2000. The term underrepresented refers to the absence of the history, contributions, and perspectives of individuals and groups in the traditional approach to social science standards and or within previous social science textbooks.

Oregon Social Science Grade Level Standards

Kindergarten Standards (Focus: Me and My World)

In kindergarten, students embark on the collective experience of public education, acclimating to the classroom community. Social science domains, concepts, disciplinary practices, and content are natural connections to lessons developing literacy, social and emotional skills. The standards support foundational understanding for respectful relationships. Students develop an understanding of identity, democratic values, cultural traditions, and influential historical figures while constructing chronological narratives and examining cause and effect within their community.

Creating representations of their surroundings, using directional terms, and identifying local migration stories while exploring human interactions with the environment are foundational kindergarten geography skills and knowledge. Financial literacy basics, such as identifying US currency, understanding its purpose, recognizing different jobs/volunteer roles, and the earning, saving and spending of money.

Essential Disciplinary Practices

I. Develop **questions** for social science inquiry.	II. Use **chronological thinking skills,** connecting the past with the present to recognize continuity and change in human history.	III. Collect, interpret, evaluate, and apply information from **primary and secondary sources** to better understand and create historical narrative distinguishing between fact and opinion.	IV. Seek and analyze diverse perspectives to develop **a more complete understanding of past** and current events.	V. Evaluate and assess how discrimination, racism, and inequality create **historical narratives, individual perspectives**, intersecting identities, and diverse understandings of the past and present.
VI. Construct well-reasoned and logically coherent **explanations, arguments, and solutions** related to complex societal issues.	VII. Cultivate **global awareness and cultural understanding** to effectively engage with diverse cultures and perspectives in an interconnected world.	VIII. Demonstrate empathy to understand how **identities** shape actions of resistance and resilience among individuals and communities.	IX. Develop the necessary skills to critically analyze and evaluate **digital and social media** content, identify reliable sources, and become more informed and responsible digital citizens.	X. Apply the practices and knowledge of social science to determine the most effective ways to take **informed civic action**.

Civics (K.C)

Concept	Code	Standard	Examples include, but not limited to:
Political Institutions	**K.C.PI.1**	Explain the goals and purpose of public school.	• Meeting friends • Shared experience • Creating community • Cooperation • Learning
Identity, Roles, and Responsibilities	**K.C.IR.2**	Recognize and develop an understanding of the components of a person's identity including race, gender, family, ethnicity, culture, religion, and ability.	• Individuals with diverse backgrounds and abilities • Different family structures • Cultural traditions and holidays
	K.C.IR.3	Identify the social skills necessary for healthy and respectful dialogue and relationships.	• Following classroom rules • Active listening • Respect for diversity • Kindness • Cooperation • Apologies to repair relationships
Democratic Principles	**K.C.DP.4**	Explain how words and actions affect others and explore what causes people to act in caring or hurtful ways.	• Classroom community • Celebrating together • Identify emotions
	K.C.DP.5	Recognize holidays as special days that may celebrate democratic values, have religious significance, and recognize noteworthy events or people in history.	• Martin Luther King Jr. Day • President's Day • Memorial Day • Juneteenth • Independence Day • Labor Day • Indigenous Peoples' Day • Veteran's Day • Native American Heritage Day • Thanksgiving
Civic Engagement	**K.C.CE.6**	Explain and demonstrate how rules can reduce conflict, address unfairness, and promote fairness in different settings and cultures.	• Taking turns • Transitioning to next activity • Raising hand

Geography (K.G)

Concept	Code	Standard	Examples include, but not limited to:
Geographic Reasoning	**K.G.GR.1**	Identify, compare, and contrast pictures, maps, and globes.	• Portraits and landscapes • Black and white vs. color • Physical maps and raised relief globes
	K.G.GR.2	Create a representation of where you live, work, and play.	• Drawings • Maps • Collages
	K.G.GR.2	Use terms related to location, direction, and distance.	• Over/under • Here/there • Left/right • Above/below • Forward/backward • In between
Migration and Movement	**K.G.MM.4**	Identify the migration stories of people to and within the local community/neighborhood.	• From other countries • From other states • From other towns
	K.G.MM.5	Use maps to locate, identify, and describe places of importance to self, family, school, and culture.	• Home address • School, parks, shopping areas, etc.
Human Interaction and Interconnection	**K.G.HI.6**	Compare and contrast the diverse aspects of culture represented in the community, such as individuals, events, songs, symbols, and community celebrations.	• Classroom communities • School communities • Local communities
	K.G.HI.7	Identify and begin to understand ways humans interact with their environment	• Gardening or farming • Hunting or fishing • Clearing land or damming rivers • Designing towns and cities
	K.G.HI.8	Explain the influence of seasonal change on human activities.	• Planting and harvesting • Outdoor sports • Clothing to wear

Economics (K.E)

Concept	Code	Standard	Examples include, but not limited to:
Earning, Saving, and Spending	**K.E.ES.1**	Identify denominations of US money and explain uses for money.	• Coins and paper money • Buying and Saving • Taxes
	K.E.ES.2	Give examples of different jobs and volunteer positions in communities.	• Teacher • Crossing guard • Librarian • Mail carrier
Incentives, Choice, and Consumer Behavior	**K.E.IC.3**	Provide examples of goods and services people purchase with the money they earn.	• Food • Clothing • Healthcare

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History (K.H)

Concept	Code	Standard	Examples include, but not limited to:
Continuity and Change (H.CH)	**K.H.CH.1**	Recognize that events happen in sequential order.	• First, next, last • Now, then, before, long-ago, after • Past, present, today, tomorrow, yesterday, next week, last week, next month, etc.
Conflict and Cooperation (H.CC)	**K.H.CC.2**	Identify examples in stories, biographies, or other primary and secondary sources of unfairness or injustice toward individuals or groups, and the changemakers working for a better world.	• Individuals from national and state history • Characters in books and stories • Community members
Cause and Effect (H.CE)	**K.H.CE.3**	Explain the cause and effect of an event in a community.	• Community days • Harvest time • Parades
Communities and Pluralism (H.CP)	**K.H.CP.4**	Compare traditions and celebrations of people with different cultural backgrounds within a community.	• Birthdays • Family meals • Religious or cultural celebrations

Grade 1 Standards (Focus: My School and Family)

First grade continues the development of a student's understanding of themselves and their place within the classroom, school, and local community. The social science domains, concepts, disciplinary practices, and content are natural connections to lessons developing literacy, social and emotional skills. In first grade, students learn to recognize and respect diverse cultural heritage, celebrations, and influential figures while exploring the responsibilities of belonging to various groups.

Students construct and interpret maps, locate important community locations, investigate why and how people migrate, recognize diverse ways of living, and how humans modify environments. Economic concepts include needs and wants, consumer and producer, and goods and services. Students use primary documents like photographs, art, music, and writing to explore and reflect on the interconnections of multifaceted identities within family, school, and local community. Activities and stories featuring democratic values of fairness, equality, and inclusion build disciplinary vocabulary and help to improve reading comprehension.

Essential Disciplinary Practices

I. Develop **questions** for social science inquiry.	II. Use **chronological thinking skills,** connecting the past with the present to recognize continuity and change in human history.	III. Collect, interpret, evaluate, and apply information from **primary and secondary sources** to better understand and create historical narrative distinguishing between fact and opinion.	IV. Seek and analyze diverse perspectives to develop **a more complete understanding of past** and current events.	V. Evaluate and assess how discrimination, racism, and inequality create **historical narratives, individual perspectives**, intersecting identities, and diverse understandings of the past and present.
VI. Construct well-reasoned and logically coherent **explanations, arguments, and solutions** related to complex societal issues.	VII. Cultivate **global awareness and cultural understanding** to effectively engage with diverse cultures and perspectives in an interconnected world.	VIII. Demonstrate empathy to understand how **identities** shape actions of resistance and resilience among individuals and communities.	IX. Develop the necessary skills to critically analyze and evaluate **digital and social media** content, identify reliable sources, and become more informed and responsible digital citizens.	X. Apply the practices and knowledge of social science to determine the most effective ways to take **informed civic action**.

Civics (1.C)

Concept	Code	Standard	Examples include, but not limited to:
Political Institutions (C.PI)	**1.C.PI.1**	Explain the purpose of local government.	• Public schools & parks • Public libraries • Roads and highways • Local government such as town councils or school boards • Public transportation
Identity, Roles, and Responsibilities (C.IR)	**1.C.IR.2**	Identify, affirm, respect, and explain the diverse cultural heritage, songs, symbols, monuments, figures, and celebrations of the community and the diverse social and ethnic groups in Oregon and the United States of America.	• US and Oregon flags • Historic individuals • Bald eagle and beaver • Statue of Liberty
	1.C.IR.3	Discuss the benefits, expectations, and responsibilities of belonging to various types of groups.	• Family • Classroom • School • Neighborhoods, town, city, state, country • Teams and clubs • Congregation
Democratic Principles (C.DP)	**1.C.DP.4**	Define important concepts and values of civic life.	• Fairness and unfairness • Equality and equity • Inclusion and exclusion • Rights and responsibilities • Harm and repair
Civic Engagement (C.CE)	**1.C.CE.5**	Identify rules and describe the responsibilities of leaders and team members when participating in rule making and group activities.	• Listening • Helping • Organizing • Setting an example • Including everyone

Geography (1.G)

Concept	Code	Standard	Examples include, but not limited to:
Geographic Reasoning (G.GR)	**1.G.GR.1**	Identify and construct maps representing familiar places utilizing information from legends and keys.	• Scale • Cardinal directions • Symbols • Colors
	1.G.GR.2	Locate and identify important locations in the community.	• School • Library • Fire department • Cultural places
	1.G.GR.3	Locate and explain that a capital city is the center of government for a state or nation.	• Absolute location • Relative location
Migration and Movement (G.MM)	**1.G.MM.4**	Explain why and how people move to and within communities.	• From other countries • From other states • From other cities
Human Interaction and Interconnection (G.HI)	**1.G.HI.5**	Demonstrate understanding that people from various parts of the world can have diverse ways of living, customs, and languages and all deserve respect.	• Family structures • Holidays • Foods
Human Environmental Interaction (G.HE)	**1.G.HE.6**	Provide examples of local natural resources and describe how people use them.	• Farming • Hunting • Agriculture • Water
	1.G.HE.7	Describe ways people modify their environment.	• Farming and cultivating • Building homes and schools • Road construction • Cleaning up pollution

Economics (1.E)

Concept	Code	Standard	Examples include, but not limited to:
Earning, Saving, and Spending (E.ES)	**1.E.ES.1**	Identify sources of income.	• Gifts • Borrowing • Work wages • Government assistance
	1.E.ES.2	Identify choices and decisions for various uses of money.	• Saving • Spending • Contributing
Incentives, Choice, and Consumer Behavior (E.IC)	**1.E.IC.3**	Explain the difference between a need and a want.	• Food • Water • Clothing • Shelter • Treats • Toys
Micro and Macro (E.MI)	**1.E.MI.4**	Describe how people are buyers (consumers) and sellers (producers).	• Grocery stores/farmers markets • Lemonade stands • Book stores/authors
	1.E.MI.5	Identify, provide examples of, and distinguish places in communities that provide goods and services.	• Grocery store • Doctors Office • Hardware store • Restaurant • School
Specialization, Trade, & Interdependence (E.ST)	**1.E.ST.6**	Investigate how people can benefit themselves and others by developing specific skills, strengths, and goods.	• Creating a product with locally available resources • Trading goods between regions • Offering a service

History (1.H)

Concept	Code	Standard	Examples include, but not limited to:
Continuity and Change (H.CH)	**1.H.CH.1**	Recognize and document sequential patterns in seasonal events or firsthand experiences, using a calendar, words, and phrases relating to chronology and time.	• Day, week, month • Year, decade, century • Ago • BCE/CE • Time Immemorial
Conflict and Cooperation (H.CC)	**1.H.CC.2**	Describe the use of individual and group characteristics to divide, unite, and categorize racial, religious, ethnic, and social groups in ways that may be helpful or harmful.	• Stereotyping • Segregation and discrimination • Community pride • Celebrations • Inclusive policies • Cultural exchange
Cause and Effect (H.CE)	**1.H.CE.3**	Use primary sources such oral histories or artifacts to develop a simple timeline of a family's history in sequential order.	• Family tree • Photo album • Interviews
Communities and Pluralism (H.CP)	**1.H.CP.4**	Examine and understand self-identity and how it fits with the identities of the family, school, and the local community.	• Age • Interests • Cultural background
	1.H.CP.5	Identify and explain various viewpoints, including those from historically marginalized or underrepresented groups and individuals within our community, regarding local matters.	• Community gardens/land use • Environmentalism • Health and safety

Grade 2 Standards (Focus: My Neighborhood, My Community)

In second grade, students explore their roles as members of the local community. The standards provide opportunities to investigate the responsibilities of civic leaders and changemakers working for equity and justice. Students analyze approaches to conflict resolution and discuss how individuals and groups can impact the community. Through exploring diverse cultural identities, holidays, and community landmarks, students gain a deeper appreciation for the rich pluralism of their local environment while building content-area vocabulary.

Studying primary and secondary sources like maps, photographs, and interviews allows students to practice geographic reasoning and historical thinking skills. Teachers can utilize these sources across the curriculum to build literacy skills like identifying key details, comprehending informational texts, and conducting research. For example, analyzing maps, artifacts, or interviews related to the local community can engage students in close reading and evidence-based writing.

Essential Disciplinary Practices

I.	Develop **questions** for social science inquiry.	II.	Use **chronological thinking skills,** connecting the past with the present to recognize continuity and change in human history.	III.	Collect, interpret, evaluate, and apply information from **primary and secondary sources** to better understand and create historical narrative distinguishing between fact and opinion.	IV.	Seek and analyze diverse perspectives to develop **a more complete understanding of past** and current events.	V.	Evaluate and assess how discrimination, racism, and inequality create **historical narratives, individual perspectives**, intersecting identities, and diverse understandings of the past and present.
VI.	Construct well-reasoned and logically coherent **explanations, arguments, and solutions** related to complex societal issues.	VII.	Cultivate **global awareness and cultural understanding** to effectively engage with diverse cultures and perspectives in an interconnected world.	VIII.	Demonstrate empathy to understand how **identities** shape actions of resistance and resilience among individuals and communities.	IX.	Develop the necessary skills to critically analyze and evaluate **digital and social media** content, identify reliable sources, and become more informed and responsible digital citizens.	X.	Apply the practices and knowledge of social science to determine the most effective ways to take **informed civic action**.

Civics (2.C)

Concept	Code	Standard	Examples include, but not limited to:
Political Institutions (C.PI)	**2.C.PI.1**	Identify local education and civic leaders and describe their role and responsibilities.	• Teacher • Principal • Superintendent • School Board • Mayor • Council person • Governor
	2.C.PI.2	Explain the selection of political leaders through voting and democratic elections.	• Campaigns (speeches & advertising) • Platform/promises • Secret ballot • "Majority rules"
Identity, Roles, and Responsibilities (C.IR)	**2.C.IR.3**	Describe and analyze the many ways students can affect their local community.	• Community gardens • Environmental conservation • Attending community events • Talking about community issues
	2.C.IR.4	Explain that all people born in the United States are citizens, many people become citizens after moving to the United States from another country, and that all residents of the United States are members of the community with rights and responsibilities.	• Right to education • Civil rights • Obeying the laws • Paying taxes • Contributing positively to the community
Democratic Principles (C.DP)	**2.C.DP.5**	Define, explain, and analyze different approaches to conflict resolution among individuals, groups, and communities.	• Fairness • Justice • Equality • Equity • Restorative
Civic Engagement (C.CE)	**2.C.CE.6**	Compare the personal point of view with others' perspectives when participating in rule setting and addressing disagreements over issues of fairness or injustice.	• Listening • Helping • Organizing • Setting an example • Including everyone

Geography (2.G)

Concept	Code	Standard	Examples include, but not limited to:
Geographic Reasoning (G.GR)	**2.G.GR.1**	Use the information on maps and other geographic tools to locate, identify, and describe the physical and human features of the community.	• Map title or heading • Legend or key • Scale • Grid • Cardinal and ordinal directions • Color • Topography
	2.G.GR.2	Utilize maps and globes to investigate and identify the world's physical geography.	• Oceans • Continents • Mountains • Rivers
	2.G.GR.3	Utilize maps and globes to investigate and identify the world's political geography.	• Local towns and cities • State and national capitals • State borders • Major cities
Migration and Movement (G.MM)	**2.G.MM.4**	Investigate the causes of regional and global migration.	• Economic opportunity • Security • Natural disaster
Human Interaction and Interconnection (G.HI)	**2.G.HI.5**	Explain how factors such as race, culture, religion, gender, indigeneity, and socioeconomic status contribute to identity.	• Holidays celebrated • Languages used • Resilience • Religious/spiritual associations
	2.G.HI.6	Examine the group identities in a community and describe how a diversity of cultural elements can enrich it.	• Language • Literature • Arts • Religion • Traditions • Customs

Concept	Code	Standard	Examples include, but not limited to:
	2.G.HI.7	Compare and contrast the diverse aspects of culture represented in a community, such as individuals, events, songs, symbols, and celebrations.	• Individuals • Classroom communities • Local communities • State communities
Human Environmental Interaction (G.HE)	**2.G.HE.8**	Explain and describe how humans either adapt to, or change, the environment to meet their needs for survival and living and why humans prefer to settle by rivers, bodies of water, and in or near certain landforms.	• Horticulture • Agriculture • Hunting • Domesticating animals • Natural or human made shelter

Economics (2.E)

Concept	Code	Standard	Examples include, but not limited to:
Earning, Saving, and Spending (E.ES)	**2.E.ES.1**	Explain why people save money and the various saving methods, such as saving at home or in a bank account, to help reach both short and long-term financial goals.	• An expensive purchase • A "rainy day" • A special treat • A significant event
	2.E.ES.2	Explain why employers pay people for their work.	• Recognition and reward • Incentive and motivation • Fairness and equity
Micro and Macro Economics (E.MI)	**2.E.MI.3**	Describe how examples of capital, human, and natural resources are related to goods and services.	• Machinery and factories • Labor, skills, and knowledge • Renewable and non-renewable resource
	2.E.MI.4	Provide examples of exchanges between buyers (consumers) and sellers (producers) in the community.	• Cafeteria • Grocery store • Book fair • Garage sale
Incentives, Choice, and Consumer Behavior (E.IC)	**2.E.IC.5**	Give examples of choices people make about buying goods and services	• Purchasing groceries or eating at a restaurant • Growing and harvesting from a garden • Books or video games • Toys or candy
Specialization, Trade, and Interdependence (E.ST)	**2.E.ST.6**	Explain why people specialize in producing goods and services.	• Creating a product with locally available resources • Trading goods between regions • Offering a service
	2.E.ST.7	Identify resources as renewable and non-renewable.	• Renewable: forests, crops, wind, solar • Nonrenewable: oil, natural gas, minerals

History (2.H)

Concept	Code	Standard	Examples include, but not limited to:
Continuity and Change (H.CH)	**2.H.CH.1**	Use chronological time to distinguish between events that happened in the recent and distant past.	• Day, week, month • Year, decade, century • Ago • Before Common Era (BCE)/Common Era (CE) • Time immemorial
	2.H.CH.2	Develop and analyze a timeline of events in the history of the local community.	• Local tribal affiliation • Settler arrival • Founding of town • First school constructed
Conflict and Cooperation (H.CC)	**2.H.CC.3**	Describe how individuals and groups in the local community have functioned as changemakers for equity, equality, and freedom.	• Tribal sovereignty • Expanding civil rights • Removing barriers to equality
Cause and Effect (H.CE)	**2.H.CE.4**	Use primary and secondary sources, including conducting interviews with family members, neighbors, friends, or school staff to discover and document where their families came from, inclusive of adoptive, blended, foster, and other forms of family, and how and why they moved to where they now live, and when and why their families came to Oregon.	• Since time immemorial • Recent immigration to Oregon • Generational presence in Oregon • Push and pull factors in moving to Oregon
Communities and Pluralism (H.CP)	**2.H.CP.5**	Identify the history and contributions of traditionally underrepresented individuals and groups relevant to the local community.	• Histories and contributions from the nearest federally recognized Oregon Tribe • Groups identified in Section III of this guide
	2.H.CP.6	Identify and describe community celebrations, landmarks, and symbols from a variety of traditions and explain why they are significant to the cultural heritage of members of the community.	• National or state holiday celebration • Cultural celebrations • Religious celebrations and symbols

Grade 3 Standards (Focus: Our Community and Beyond)

In third grade, students expand their civic understanding by examining state political institutions, democratic principles like majority rule and minority rights, and ways individuals can promote democratic values. They investigate differences in perspectives based on identities and experiences. Students also analyze public issues and explore avenues for civic engagement at local and regional levels.

Integrating literacy skills like close reading of sources, evaluating evidence, and research, students build historical thinking skills when utilizing primary and secondary sources like interviews, artifacts, and archives to research their local community's history and changemakers. By creating timelines, students trace significant events and the legacy of discrimination.

The economic standards introduce concepts of supply/demand pricing, advertising influences, opportunity costs, and the purpose of taxes. Authentic activities requiring financial decision-making and analysis can cross over with math content and skills to boost math proficiency. The standards foster geographic reasoning by using maps, globes, and geographic tools to identify the physical and cultural features of Oregon and the Pacific Northwest and compare how geographic factors impact communities across Oregon's diverse regions.

Essential Disciplinary Practices

I. Develop **questions** for social science inquiry.	II. Use **chronological thinking skills,** connecting the past with the present to recognize continuity and change in human history.	III. Collect, interpret, evaluate, and apply information from **primary and secondary sources** to better understand and create historical narrative distinguishing between fact and opinion.	IV. Seek and analyze diverse perspectives to develop **a more complete understanding of past** and current events.	V. Evaluate and assess how discrimination, racism, and inequality create **historical narratives, individual perspectives**, intersecting identities, and diverse understandings of the past and present.
VI. Construct well-reasoned and logically coherent **explanations, arguments, and solutions** related to complex societal issues.	VII. Cultivate **global awareness and cultural understanding** to effectively engage with diverse cultures and perspectives in an interconnected world.	VIII. Demonstrate empathy to understand how **identities** shape actions of resistance and resilience among individuals and communities.	IX. Develop the necessary skills to critically analyze and evaluate **digital and social media** content, identify reliable sources, and become more informed and responsible digital citizens.	X. Apply the practices and knowledge of social science to determine the most effective ways to take **informed civic action**.

Civics (3.C)

Concept	Code	Standard	Examples include, but not limited to:
Political Institutions (C.PI)	**3.C.PI.1**	Identify state offices, leaders, and their functions.	• Governor • House Minority Leader • Speaker of the House • Secretary of State • Secretary of Treasury • State Representative • State Senator
Identity, Roles, & Responsibilities (C.IR)	**3.C.IR.2**	Explain the differences between allies and bystanders exploring how individuals can promote democratic values such as liberty, equality, and justice when they see someone targeted for who they are.	• Teasing or bullying in school • Excluding someone on the playground • Historical examples from classroom biographies
	3.C.IR.3	Recognize that people's identities and individual experiences can lead to different interpretations of situations and events.	• Historical events • Current events • Social interactions • Literary characters • Family traditions
	3.C.IR.4	Explain how a community relies on active civic participation and identify opportunities for student participation in local and regional issues.	• Volunteer opportunities • Community gardens • Environmental conservation • Attending community events • Service projects
	3.C.IR.5	Describe the responsibilities of people in their community and state.	• Helping others • Neighborhood upkeep • Following rules • Learning
Democratic Principles (C.DP)	**3.C.DP.6**	Explain the democratic principle of a smaller voting group (the minority) having rights that the larger voting group (the majority) cannot take away.	Note- Understanding how democracy balances the idea of majority rule with protected rights for individuals.
Civic Engagement (C.CE)	**3.C.CE.7**	Identify a local public issue and describe ways individuals and groups can engage with decision-makers to have influence in the civic life of their communities.	• Letters and emails • Petition • Attend public meeting

Geography (3.G)

Concept	Code	Standard	Examples include, but not limited to:
Geographic Reasoning (G.GR)	**3.G.GR.1**	Distinguish between physical, political, cultural, and thematic maps of Oregon and the United States.	• Tribal language maps • River systems • State boundaries • Resource map • Immigration/migration patterns
	3.G.GR.2	Use lines of latitude and longitude on multiple types of maps, globes, and images to locate and describe tribal lands, environmental regions, and counties of Oregon and the greater Pacific Northwest.	• River systems • Urban and rural districts • Economic zones • Mountains and volcanoes
Migration and Movement (G.MM)	**3.G.MM.3**	Evaluate multiple theories on the populating and human movement in North and South America using archaeological evidence for the origins of people in North America, including in the Pacific Northwest.	• Rimrock Draw Rock shelter • Paisley Caves • Cooper's Ferry • Fort Rock Crater
	3.G.MM.4	Investigate the causes behind global migration, distinguishing between voluntary relocation and forced displacement.	• Environmental displacement • Economic opportunities • Political asylum • War refugees
Human Interaction and Interconnection (G.HI)	**3.G.HI.5**	Compare and contrast the diverse aspects of culture represented in a community, such as individuals, events, songs, symbols, and celebrations of community.	• Individuals • Classroom Communities • Local Communities • State Communities
Human Environmental Interaction (G.HE)	**3.G.HE.6**	Describe and compare how the physical and human geography of different Oregon regions affects the attributes of local communities.	• Oregon Coast • Willamette Valley • Rogue Valley • Cascade Range • Klamath Mountains • Deschutes-Columbia Plateau • High Desert • Blue Mountains
	3.G.HE.7	Identify and analyze Oregon's natural resources and describe how people in Oregon and other parts of the world use them.	• Timber • Fisheries • Agriculture

Economics (3.E)

Concept	Code	Standard	Examples include, but not limited to:
Earning, Saving, and Spending (E.ES)	**3.E.ES.1**	Consider the effect of individual financial decisions on personal, community, regional, and world resources.	• Personal budgeting • Investment and growth • Consumption and environmental impact
	3.E.ES.2	Explain the purpose of taxes in supporting examples of public goods.	• Fire protection • Police • Public libraries • Schools • Parks
Micro and Macro Economics (E.MI)	**3.E.MI.3**	Identify the relationship between supply and demand in setting the price of goods and services in the marketplace.	• Lemonade-stands • Concert tickets • Farmers market • Technology
	3.E.MI.4	Analyze the effect of government and business decisions on personal and community resources.	• Government regulations • Manufacturing process • Sustainable practices
Incentives, Choice, and Consumer Behavior (E.IC)	**3.E.IC.5**	Explain the role of advertising and peer pressure in decision-making.	• Choosing snacks • Picking toys • Playing games/apps • Group activity
	3.E.IC.6	Explain opportunity cost and how it influences buying decisions.	• Note- Opportunity cost is the trade-off, such as choosing to stay inside and read a book instead of going to play outside. The time not spent playing outside is the opportunity cost of staying inside to read a book.
Specialization, Trade, and Interdependence (E.ST)	**3.E.ST.7**	Investigate examples of specialization and economic interdependence in the local community.	• A baker and a butcher • A fisher and farmer • A car mechanic and a teacher
	3.E.ST.8	With prompting and support, ask and answer questions about buying, selling, or trading something and explain how people make choices about the things they need and want.	• Price comparison • Quality comparison • Prioritizing purchases

History (3.H)

Concept	Code	Standard	Examples include, but not limited to:
Continuity and Change (H.CH)	**3.H.CH.1**	Use primary and secondary sources, including conducting interviews, to research the history of the local community or region.	• Tribal history and presence • Historical figures and places • Archival newspapers • Local museums • Journals, oral histories, music • Political cartoons, photos, maps
	3.H.CH.2	Create a timeline of noteworthy events to better understand the historical and contemporary events of the local community or region.	• Tribal history and presence • Establishment of agriculture or industry • Current issue with historic connection
Conflict and Cooperation (H.CC)	**3.H.CC.3**	Describe how individuals and groups in the local community and region have functioned as changemakers for equity, equality, and freedom against bias, discrimination, racism, and oppression.	• Tribal sovereignty • Expanding civil rights • Removing barriers to equity and equality 128
Cause and Effect (H.CE)	**3.H.CE.4**	Describe how the inclusion or exclusion of individuals, social and ethnic groups, has shaped events and development of the local community and region.	• Oregon's Black Exclusionary Law • Limitations on land ownership • Taxes on Black, Asian, and people of multiple races • Sundown laws • Forced tribal removal and resettlement
Communities and Pluralism (H.CP)	**3.H.CP.5**	Identify what individuals and families bring with them when they move to a different place.	• Memories • Cultural traits • Goods • Ideas • Language and ways of communicating
	3.H.CP.6	Describe how the identity of the local community shaped its history and compare it to other communities in the region.	• Tribal presence • Immigrant cultures • Rural or urban setting • Locally available resources

Grade 4 Standards [Focus: Oregon]

In fourth grade, students embark on an in-depth study of Oregon history from the time immemorial Indigenous presence through the modern day. The standards provide a comprehensive look at the political, economic, and cultural forces that shaped Oregon. There is a strong emphasis on using primary and secondary source materials to build upon disciplinary literacy skills from third grade. Students analyze primary sources like historical maps, government documents, and personal accounts to investigate events such as Oregon's journey to statehood, conflicts over land and resources, and the legacy of colonialism. The required Tribal History/Shared History Lessons examine the sovereign tribal nations' relationships with the physical landscape and the impacts of settlement and marginalization.

Students learn to approach history as an interpretive discipline by interpreting maps, assessing human-environment interactions, and evaluating how perspectives and experiences influence narratives. Economic concepts include specialization, trade, labor, and market forces. In civics, students continue to explore democratic engagement, analyzing identities, understanding local and state institutions, and the role of individuals in shaping Oregon's development. Accessing and analyzing authentic sources is a crucial practice for building content knowledge and disciplinary literacy. The fourth-grade standards provide many opportunities to build and apply reading, writing, research, and analytical skills grounded in the social sciences.

Note: Required curriculum supporting standards on tribal government and history available from the Oregon Department of Education. Additional lessons and resources may also be available from local tribal websites and education centers.

Essential Disciplinary Practices

I. Develop **questions** for social science inquiry.	II. Use **chronological thinking skills,** connecting the past with the present to recognize continuity and change in human history.	III. Collect, interpret, evaluate, and apply information from **primary and secondary sources** to better understand and create historical narrative distinguishing between fact and opinion.	IV. Seek and analyze diverse perspectives to develop **a more complete understanding of past** and current events.	V. Evaluate and assess how discrimination, racism, and inequality create **historical narratives, individual perspectives**, intersecting identities, and diverse understandings of the past and present.
VI. Construct well-reasoned and logically coherent **explanations, arguments, and solutions** related to complex societal issues.	VII. Cultivate **global awareness and cultural understanding** to effectively engage with diverse cultures and perspectives in an interconnected world.	VIII. Demonstrate empathy to understand how **identities** shape actions of resistance and resilience among individuals and communities.	IX. Develop the necessary skills to critically analyze and evaluate **digital and social media** content, identify reliable sources, and become more informed and responsible digital citizens.	X. Apply the practices and knowledge of social science to determine the most effective ways to take **informed civic action**.

Civics (4.C)

Concept	Code	Standard	Examples include, but not limited to:
Political Institutions (C.PI)	**4.C.PI.1**	Investigate the creation of the Oregon constitution and identify its key components. *Note: Teachers may choose the sections of the Constitution that are most accessible and relevant to their students.*	• Laws • Rights • Processes • Division of power among the branches of government
	4.C.PI.2	Compare key components of at least two Constitutions of the nine federally recognized Oregon Tribes.	• Membership • Voting procedures • Branches of government
Identity, Roles, & Responsibilities (C.IR)	**4.C.IR.3**	Examine how identity shapes perspectives about a local or state issue.	• Historical events • Current events • Social interactions
Democratic Principles (C.DP)	**4.C.DP.4**	Identify examples from the Oregon Constitution establishing equality or addressing discrimination, inequalities, or unfairness.	• Article I Sec. 1-20 • Article II Sec. 6 • Article XV Sec. 8
Civic Engagement (C.CE)	**4.C.CE.5**	Describe the importance of civic participation, including the ballot initiative process, in changing Oregon's laws and Constitution.	• Drafting and passage of the "Bottle Bill" • Student-led efforts on education standards • Local levies and bonds • Citizen statements in Oregon's official voter guide

Geography (4.G)

Concept	Code	Standard	Examples include, but not limited to:
Geographic Reasoning (G.GR)	**4.G.GR.1**	Read and/or construct maps of the Northwest, Southwest, Midwest, Northeast, and Southeast, US Atlantic and Pacific Islands using a scale, compass, and key that includes important cities and physical features.	• Political maps • Physical maps • Capital cities • Urban centers • Rivers and lakes • Tribal lands
	4.G.GR.2	On political and physical maps of North America, locate significant sites in the United States, Mexico, Canada, Oregon, Nevada, Alaska, Hawai`i, Washington, Idaho, and California.	• Capital cities • Urban centers • Rivers and lakes • Tribal lands
	4.G.GR.3	Compare and contrast tribal, colonial, historical, and contemporary maps to understand Oregon's history.	• Pre-Oregon territory maps • Coastal navigation maps • Cultural and language maps • Resource maps
Migration and Movement (G.MM)	**4.G.MM.4**	Compare and contrast varying patterns of exploration and settlement in the Pacific Northwest over time, considering how physical features and the availability of natural resources affected exploration and settlement patterns, including the development of major urban/suburban areas, industries, or trade.	• Tribal land and natural resources • Spanish exploration • British, Russian, U.S. exploration and claims • Fur trade • Navigable rivers • Timber
	4.G.MM.5	Explain how the contributions of the Indigenous Tribes of Oregon and various historical and contemporary immigrant groups create the diverse culture of present-day Oregon.	• Cultural celebrations • Languages spoken in the community • Public artwork • Place names

Concept	Code	Standard	Examples include, but not limited to:
Human Interaction and Interconnection (G.HI)	**4.G.HI.6**	Assess how physical geography and changing environmental factors affect land use and shape the cultural characteristics of a society.	• Resource extraction and conservation • Rural and urban • Horticulture and agriculture • Water access
Human Environmental Interaction (G.HE)	**4.G.GE.7**	Identify the effects on environmental stability and sustainability of technologies and policies such as dams, wind turbines, and transportation in shaping Oregon's physical and human geography.	• Flooding and drought • Air, soil, water pollution • Agricultural production • Forest and fire management • Public transportation
	4.G.GE.8	Utilize the Social Science Tribal History Shared History lessons to explore the relationship of the Nine federally recognized Tribes in Oregon with physical and human geography.	• Location of current and ancestral tribal lands • Cultural similarities and differences • Tribal stewardship of land

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Economics (4.E)

Concept	Code	Standard	Examples include, but not limited to:
Earning, Saving, and Spending (E.ES)	**4.E.ES.1**	Examine the consequences of power and privilege on issues associated with poverty, income, and wealth accumulation.	• Wealth and income inequality • Poverty rates and distribution • Government policies • Investment and spending
	4.E.ES.2	Describe the difference between wages, salaries, commissions, and tips.	• Service (tips) • Construction (wages) • Educators (salary) • Real estate agent (commission)
	4.EF.ES.3	Describe examples of government-provided goods and services funded with taxes.	• Public transportation and education • Police and fire departments • Health care and social services • Military defense and environmental protection
Micro and Macro Economics (E.MI)	**4.E.MI.4**	Explain the role of producers, consumers, products, and labor in economic markets.	• Producers: Manufacturing, farming, service providers • Consumers: Household, business, and government consumers • Labor: Factory, farm, professional, service
	4.E.MI.5	Investigate the relationship between the supply and demand of goods produced in Oregon.	• Timber • Agricultural • Technology

Concept	Code	Standard	Examples include, but not limited to:
Incentives, Choice, and Consumer Behavior (E.IC)	**4.E.IC.6**	Demonstrate understanding of needs and wants using a budget.	• Planning a family vacation • Trip to the store • Researching prices
	4.E.IC.7	Identify the use of targeted marketing in creating demand for consumer products.	• Television commercials • Product placement • Social media influencers
	4.E.IC.8	Analyze different buying choices and opportunity costs.	Opportunity cost as the trade-off required in selecting to purchase chocolate or fruit when there is not enough money for both.
	4.E.IC.9	Demonstrate understanding of safe internet practices by applying strategies to protect personal information.	• Identifying personal information • Safety and privacy settings • Maintaining passwords
Specialization, Trade, Interdependence (E.ST)	**4.E.ST.10**	Explain how trade leads to increasing economic interdependence.	• Goods and services • Specialization • Access to resources • Supply chains

History (4.H) (Oregon and Pacific Northwest Time Immemorial to Present)

Concept	Code	Standard	Examples include, but not limited to:
Continuity and Change (H.CH)	**4.H.CH.1**	Identify and examine the Indigenous sovereign people of Oregon prior to and during waves of exploration and settlement from Europe and the United States. *Students should engage with lessons provided in Tribal History/Shared History to identify the first nine people groups of Oregon.*	• Tribal lifeways • Immigrant settlement patterns • Federal and state policies
	4.H.CH.2	Investigate the role of "Manifest Destiny" and racial prejudice in shaping Oregon's transition from "Oregon Country" to statehood. Include the legal, political, and cultural factors causing marginalization and attempts to promote inclusivity.	• Exploration from Pacific and by Corps of Discovery • Immigration from the U.S. into Oregon Territory • Oregon Trail 1840-1860 • Oregon Treaty 1846 • Oregon Donation Land Act • Indigenous removal and reservations • Exclusionary laws in territorial & state government • Adoption of 13th-15th Amendments to U.S. Constitution • Asian exclusion and discrimination • Native Hawaiian and Pacific Islander exclusion and discrimination • Repeal of discriminatory laws in Oregon Constitution
Conflict and Cooperation (H.CC)	**4.H.CC.3**	Identify examples of Indigenous resistance to the expansion of non-Indigenous settlers into Oregon lands in the causes and results of the battles and wars in Oregon Territory and 19th century Oregon.	• Rogue River War • Nez Perce War • Modoc War • Treaties

Concept	Code	Standard	Examples include, but not limited to:
Cause and Effect (H.CE)	**4.H.CE.4**	Give examples of how changes in Oregon's agricultural, industrial, political, and business development over time affect people of the state including traditionally underrepresented groups.	• Agricultural mechanization and migrant labor • Timber and tribal Lands • Women's suffrage in Oregon • Urban housing policies and gentrification
	4.H.CE.5	Use multiple sources to explore the Oregon Trail's significance in shaping Oregon history, examining its role in westward expansion, cultural interactions, and settlement patterns.	• Experience of immigrants on the trail • Indigenous people and white settler interactions • Changes in land use
Communities and Pluralism (H.CP)	**4.H.CP.6**	Identify the history, religion, languages, and cultural practices of the Indigenous Tribes of Oregon and examples of resistance and resilience to immigration and settlement by the United States.	• Preservation of native languages • Oral traditions and histories • Traditional ecological knowledge • Wars and other conflicts • Tribal Sovereignty • Cultural celebrations
	4.H.CP.7	Identify and explain how the legacy of colonialism and discrimination based on race, gender, economic, and social group identity created and continues to affect the history, growth, and current experience of residents of Oregon.	• Tribal sovereignty • Health and safety outcomes • Racial demographics of Oregon
	4.H.CP.8	Identify various conflicts within Oregon, including acts of displacement, cultural and linguistic loss, violence, economic competition, political disagreements, boundary disputes, and cultural disparities across different geographical regions and demographic groups.	• Indigenous removal and reservations • Oregon's Trail of Tears • Chinese Cove • Marshfield lynching • St. Johns' Riot • The Toledo Incident • War time incarceration of Japanese Americans

Grade 5 Standards [Focus: Colonial and Early US History to 1800]

In the fifth grade, students examine the history and cultures of Indigenous peoples' and their encounters with European explorers and colonial settlers in North America during the 15th through 18th centuries. Students identify and assess the motivations, processes, and effects of cultural interactions on both colonial and Indigenous societies, and analyze the political, economic, and social factors driving European powers to establish colonial outposts across the Americas.

A focus on the decisions and policies of colonial, Federal, and State governments allows for an analysis of the process of establishing rights and freedoms for some while denying those rights and freedoms to others based on race, gender, religion, and social status. Students evaluate the democratic ideals expressed in landmark documents like the U.S. Constitution against the realities of institutionalized slavery, property requirements for voting, and violations of tribal sovereignty. Utilizing primary sources, students interpret multiple perspectives and analyze the causes and effects of the American Revolution, exploring the varied experiences and responses of diverse groups, from patriot leaders and loyalists to the displacing impacts on Native populations.

Geographic skills are employed to understand how physical landscapes influence exploration routes, settlement patterns, agricultural development, and access to natural resources. Economic concepts directly related to the history and geography standards include mercantilism, specialization of labor, and the central role of the slave trade for colonial economies.

Essential Disciplinary Practices

I. Develop **questions** for social science inquiry.	II. Use **chronological thinking skills,** connecting the past with the present to recognize continuity and change in human history.	III. Collect, interpret, evaluate, and apply information from **primary and secondary sources** to better understand and create historical narrative distinguishing between fact and opinion.	IV. Seek and analyze diverse perspectives to develop **a more complete understanding of past** and current events.	V. Evaluate and assess how discrimination, racism, and inequality create **historical narratives, individual perspectives**, intersecting identities, and diverse understandings of the past and present.
VI. Construct well-reasoned and logically coherent **explanations, arguments, and solutions** related to complex societal issues.	VII. Cultivate **global awareness and cultural understanding** to effectively engage with diverse cultures and perspectives in an interconnected world.	VIII. Demonstrate empathy to understand how **identities** shape actions of resistance and resilience among individuals and communities.	IX. Develop the necessary skills to critically analyze and evaluate **digital and social media** content, identify reliable sources, and become more informed and responsible digital citizens.	X. Apply the practices and knowledge of social science to determine the most effective ways to take **informed civic action**.

Civics (5.C)

Concept	Code	Standard	Examples include, but not limited to:
Political Institutions (C.PI)	**5.C.PI.1**	Compare and contrast how the governments of the British monarchy, American colonies, and Indigenous Tribes shaped interactions with one another.	• Treaties and trade • Conflicts and wars • Decision making • Religion
	5.C.PI.2	Analyze the significance of the decisions and laws of the newly formed federal and state governments in establishing, expanding, limiting, and denying rights to individuals 1789-1865.	• The distribution of political power/ "Checks and Balances" • The debate over the Bill of Rights • Tensions about representation in the legislature / "Great Compromise" • The establishment of the Electoral College • Enslavement and representation "⅗ Compromise" • "Fugitive Slave Clause" • Protection of international slave trade to 1808 • Sovereignty and Native Americans • Naturalization Act • Property requirements for voting
	5.C.PI.3	Analyze how cooperation and conflict among people contribute to political, economic, religious, and current social events and situations in the United States.	• Disputes & compromises between political parties • Land use issues • Religious accommodation and separation
Identity, Roles, & Responsibilities (C.IR)	**5.C.IR.4**	Examine and critique how colonial and new states' governments established, expanded, limited, or denied rights and responsibilities of specific groups and individuals with particular attention to citizens, enslaved peoples, foreigners, nobles, religious groups, women, class systems, and Tribes.	• Abolition or expansion of slavery • Treaty rights • Voting requirements • Religious tests and taxes • Women's political and economic rights

Concept	Code	Standard	Examples include, but not limited to:
Democratic Principles (C.DP)	**5.C.DP.5**	Analyze the Preamble and sections of the Constitution to understand the establishment and limitations of democratic principles. *Note: Teachers may choose the section of the Constitution that are most accessible and relevant for their classroom.*	• Ideas of individual rights and the protection of slavery • Representative democracy and limitations on suffrage • Recognition and violations of tribal sovereignty • Equality and individual liberty • Limited Government and the supremacy clause • General Welfare and Individual property rights
Civic Engagement (C.CE)	**5.C.CE.6**	Explain specific protections provided in the Bill of Rights to individuals and the importance of these amendments to the ratification of the U.S. Constitution.	• Freedom of speech • Freedom of religion • Freedom of press • Right to trial • Rights to States

Geography (5.G)

Concept	Code	Standard	Examples include, but not limited to:
Geographic Reasoning (G.GR)	**5.G.GR.1**	Use geographic tools such as maps, satellite images, photographs, and other representations to investigate and compare the process of constructing, recognizing, and utilizing, boundaries and borders (geographic and/or human-made) in the United States.	• Tribal lands • River systems • Thematic • Topographic
	5.G.GR.2	Locate states, capital cities, and important geographic features on a United States map.	• States and capitals of the early United States • States and capitals of Pacific Northwest • Physical geography of Eastern United States
	5.G.GR.3	Locate and examine significant physical geographic features of the thirteen British colonies that became the United States.	• Effect on settlement patterns • Agricultural development • Availability of natural Resource
Migration and Movement (G.MM)	**5.G.MM.4**	Identify and analyze the implications and ramifications for Native American Tribes of the movement of people, goods, ideas, and cultural patterns to what became the United States, considering past, present, and future trends.	• Land use • Impact of disease • Trade and cultural exchange 140
	5.G.MM.5	Investigate the causes behind domestic and global migration, distinguishing between voluntary relocation and forced displacement, including scenarios like refugees, individuals compelled to leave their homeland and those enslaved.	• Relocation due to infrastructure projects • War refugees and displaced persons • Expulsion and removal for “ethnic cleansing” • Discrimination, prejudice, and racism • Response to natural disaster or environmental degradation
Human Interaction and Interconnection (G.HI)	**5.G.HI.6**	Trace on a map Indigenous Tribes' encounters with Europeans in North America and the Caribbean Islands in the 15th through the 18th centuries.	• Spain • Portugal • The Netherlands • England • France
	5.G.HI.7	Investigate the effects of exploration, conquest, exploitation, and colonial settlement on Indigenous Tribes in at least two geographic regions.	• Atlantic coast • Caribbean Islands • Mexico including the Southwest United States • California, Oregon, and Pacific Northwest

Concept	Code	Standard	Examples include, but not limited to:
Human Environmental Interaction (G.HE)	**5.G.HE.8**	Describe how physical, human, and political features influence events, movements, and adaptation to the environment.	• Push-Pull factors for immigration • Changes in climate • Cultural exchange and trade
	5.G.HE.9	Describe how technological developments, societal decisions, and personal practices affect sustainability in the United States.	• Agricultural technology and land use • Transportation • Urbanization • Government policies

Economics (5.E)

Concept	Code	Standard	Examples include, but not limited to:
Earning, Saving, and Spending (E.ES)	**5.E.ES.1**	Map out a savings and budget plan designed to achieve a future purchase objective.	• Planning a school field trip • Saving interest rates • Researching prices
	5.E.ES.2	Estimate income that a youth-operated business can earn.	• Babysitting • Lawn service • Lemonade stands
Micro and Macro Economics (E.MI)	**5.E.MI.3**	Explain the relationship between supply and demand.	• Income and consumption • Consumer preference • Availability of raw materials 142
	5.E.MI.4	Describe why the government collects taxes and what goods and services it provides society.	• Public transportation and education • Police and fire departments • Health care and social services • Military defense and environmental protection
	5.E.MI.5	Explain the United States' development from a mercantilist to a market economy.	• Exportation of raw materials • Importation of finished goods • Development of manufacturing • Limits on taxes and regulations
	5.E.MI.6	Examine the significance of the slave trade among and between the Americas, Europe, Asia, and Africa.	• North American British colonies • French and British Caribbean colonies • Portuguese Brazil • Spanish Philippines

Concept	Code	Standard	Examples include, but not limited to:
Incentives, Choice, and Consumer Behavior (E.IC)	**5.E.IC.7**	Analyze career choices with consideration of necessary qualifications, income potential, and time commitment.	• Qualification • Education requirements • Income potential
	5.E.IC.8	Analyze how incentives and opportunity costs affect decision-making.	• Choosing between joining an afterschool club or sports team • More expensive latest technology vs. saving on last year's version • Summer vacation away from home vs. time with friends
	5.E.IC.9	Discuss how life circumstances and experiences can cause people to differ in their values and attitudes about saving and their ability to save.	• Family values and behaviors on spending • Experiences with financial hardships • Employment stability and longevity
Specialization, Trade, Interdependence (E.ST)	**5.E.ST.10**	Explain why cultures and civilizations choose to specialize in producing selected goods or services.	• Crops planted and traded in the British N. American colonies. • Quahog shells to produce wampum • Shipbuilding in New England • Contemporary examples of specialization, comparative advantage, and competition.

History (5.H)

Concept	Code	Standard	Examples include, but not limited to:
Continuity and Change (H.CH)	**5.H.CH.1**	Identify the significant role of the enslavement of Indigenous peoples and Africans in the establishment of North American colonies and the United States, the gradual abolition of slavery in the Northern states, and the expansion of slavery into Western states.	• Enslaved Indigenous peoples in the 13 colonies and Caribbean • Importation and expansion of use of enslaved labor after 1619 • Northern industrial profits from use of enslaved labor in Southern states • Enlightenment Ideals and human rights • Abolition and manumission societies
	5.H.CH.2	Use maps and other sources to trace European exploration, conquest, exploitation, and colonial settlement of North America and the Caribbean Islands in the 15th through 18th centuries, and identify the reasons and effects of the voyages, including on the Indigenous Tribes already living in the region.	• Economic gain and exploitation • Empire building • Religious conversion • Spread of disease • War and dispossession • Cultural exchange and fusion • Agricultural exchange
Conflict and Cooperation (H.CC)	**5.H.CC.3**	Examine how the decisions of those in power affected those with less political/economic power in past and current movements for equality, freedom, and justice with connections to the present-day.	• 18th and 19th century treaties and current tribal sovereignty • The expansion of women's rights • Economic power and political influence
	5.H.CC.4	Analyze how instances of cooperation and conflict between Indigenous peoples and British, French, and Spanish colonial settlers contributed to political, economic, religious, and social conditions between 1500-1776.	• Anglo–Powhatan Wars 1609 • Pueblo (Pope's) Rebellion 1680 • The Great Peace of Montreal 1701 • Pontiac's Rebellion 1763
	5.H.CC.5	Analyze the effect of policies of assimilation and erasure, including cultural and physical genocide on Indigenous cultures in what became the United States.	• Disease • Violence and warfare • Force removal • Religious conversion

Concept	Code	Standard	Examples include, but not limited to:
Cause and Effect (H.CE)	**5.H.CE.6**	Identify and describe the leadership and daily life of the founders of the United States, including the political, social, and economic interactions with the local and regional Indigenous peoples.	• Leaders of American Revolution • Founders of Constitution • Haudenosaunee Confederacy
	5.H.CE.7	Explain multiple perspectives and causes and effects of events leading to colonial independence from British Rule.	• American colonies as an economic asset of British Empire • Responsibility to support British policy • Patriots and Loyalists • Increasing tensions with Indigenous Tribes • Taxation without representation
	5.H.CE.8	Examine the effects Indigenous Tribes of North America had in the early development of the United States.	• Cultural and economic exchange • Conflict and resistance • Diplomacy and treaties • Forced removal and displacement
Communities and Pluralism (H.CP)	**5.H.CEP.9**	Explain the ideas and actions of individuals and groups resisting enslavement, indigenous genocide, and denial of equality and justice with connections to present-day issues.	• Conductors of the Underground Railroad • Native American leaders resisting encroachment on tribal lands • Abolitionist church congregations • Women activists insisting on gender equality
	5.H.CP.10	Analyze the distinct way of knowing and living amongst the different Indigenous peoples of North America before contact.	• Religion • Language • Cultural practices • Consequences of contact

Grade 6/7 Standards (Paleolithic to 900 CE and 600 CE to 1900 CE)

The sixth and seventh-grade standards span a date range from early to modern history and include multiple continents, cultures, and civilizations. The early history ranges from the Paleolithic era to 900 CE (Common Era), while the later period begins at 600 CE. This overlapping range offers teachers and curriculum designers flexibility in approaching the content through chronological, hemispheric, or thematic lenses. It also accommodates the varying durations of cultures and empires, which stretch across different periods. No matter the approach, teachers should also help students see the connections of the distant past to modern-day issues and events. Initiating or ending a unit of study with examples from current events is an effective culturally relevant practice. The impact of innovative technology, the role of religion in politics, the development of human rights, etc., all have modern and ancient examples.

The scope and sequence of sixth and seventh-grade curricula should encompass examples from both date ranges (Paleolithic to 900 CE and 600 CE to 1900 CE), representing multiple cultures, civilizations, and continents. For instance, a chronological approach that helps students understand cause and effect and provides a linear understating of change over time might start with the Paleolithic era, progress through ancient civilizations, and culminate at 800 CE for sixth grade. In seventh grade, students could continue historical inquiries and delve into cultures from 600 CE to 1900 CE. Alternatively, a thematic approach that allows the exploration of common threads across eras and locations might compare mathematical and scientific understandings across different periods and geographic regions, enabling students to explore topics such as calendar calculations in ancient Mesoamerica, the early Indus Valley, and 16th-century Europe.

School districts may also consider blending aspects of both models, periodically taking a thematic lens while maintaining a chronological scope and sequence. The chosen approach should map to comprehensive coverage of all standards to ensure students receive a well-rounded study of world history, civics, geography, and economics.

Essential Disciplinary Practices

I. Develop **questions** for social science inquiry.	II. Use **chronological thinking skills,** connecting the past with the present to recognize continuity and change in human history.	III. Collect, interpret, evaluate, and apply information from **primary and secondary sources** to better understand and create historical narrative distinguishing between fact and opinion.	IV. Seek and analyze diverse perspectives to develop **a more complete understanding of past** and current events.	V. Evaluate and assess how discrimination, racism, and inequality create **historical narratives, individual perspectives**, intersecting identities, and diverse understandings of the past and present.
VI. Construct well-reasoned and logically coherent **explanations, arguments, and solutions** related to complex societal issues.	VII. Cultivate **global awareness and cultural understanding** to effectively engage with diverse cultures and perspectives in an interconnected world.	VIII. Demonstrate empathy to understand how **identities** shape actions of resistance and resilience among individuals and communities.	IX. Develop the necessary skills to critically analyze and evaluate **digital and social media** content, identify reliable sources, and become more informed and responsible digital citizens.	X. Apply the practices and knowledge of social science to determine the most effective ways to take **informed civic action**.

Civics (6/7.C)

Concept	Code	Standard	Examples include, but not limited to:
Political Institutions (C.PI)	**6/7.C.PI.1**	Compare and contrast early forms of governance in early civilizations and empires from the Paleolithic to 900 CE.	• Africa: Egypt, Axum & Kush • Asia and India: Indus and Persia • Middle East/Mediterranean: Greece, Mesopotamia, and Rome • North America: Hopewell • Mesoamerica: Toltec, Zapotec, Olmec, Maya • China: Qin and Han
	6/7.C.PI.2	Compare and contrast early forms of governance in civilizations and empires after 600 CE, including the treatment of historically underrepresented groups and individuals.	• Arab/Muslim and Ottoman • Songhai, Mali, Ghana • Song and Mongol • Caribbean, North & South America (Taino, Inca & Aztec) • Mughal and Tu'i Tonga • European Empire and Nation-States
	6/7.C.PI.3	Compare and contrast historical and modern forms of governance over time and on multiple continents.	• Theocracies • Monarchies • Authoritarian • Dictatorships • Chiefdoms • Sachems • Confederacies
	6/7.C.PI.4	Analyze the origins, purpose, and influence of diverse religions, philosophies, and legal systems on the development of modern governments and the concepts of individual, civil, and human rights, equality, equity, and justice over time and on multiple continents.	• Hammurabi's Code • The Ten Commandments • Hebrew Bible and New Testament • Pericles and Athenian Democracy • Law of the Twelve Tables • Code of Justinian • Confucianism • Chinese legalism • Laws of Manu • The Qur'an • Magna Carta • Haudenosaunee Great Law of Peace

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Concept	Code	Standard	Examples include, but not limited to:
	6/7.C.PI.5	Examine the origins, purposes, and effects of constitutions, laws, treaties, and international agreements, including the treatment of historically underrepresented groups and individuals.	• Women • Other religions • Indigenous Peoples
Identity, Roles, & Responsibilities (C.IR)	**6/7.C.IR.6**	Describe the rights and roles of citizens in civilizations and empires to 900 CE, with attention to the inclusion of historically underrepresented groups and individuals.	• Africa: Egypt, Axum & Kush • Asia and India: Indus and Persia • Middle East/Mediterranean: Greece, Mesopotamia, and Rome • North America: Hopewell • Mesoamerica: Toltec, Zapotec, Olmec, Maya • China: Qin and Han
	6/7.C.IR.7	Describe the rights and roles of citizens in civilizations and empires after 600 CE, with attention to the inclusion of historically underrepresented groups and individuals.	• Arab/Muslim and Ottoman • Songhai, Mali, Ghana • Song and Mongol • Caribbean, North & South America (Taino, Inca & Aztec) • Mughal and Tu'i Tonga • Myanmar Taungoo • Pueblo and Haudenosaunee • European Empire and Nation-States
	6/7.C.IR.8	Evaluate the effectiveness of different methods of resistance available in pluralistic democracies to combat misinformation, indifference, and discrimination.	• Organization • Protest • Reform • Celebration

Concept	Code	Standard	Examples include, but not limited to:
Democratic Principles (C.DP)	**6/7.C.DP.9**	Research and assess the effectiveness of individual and collective attempts towards the repair of civic society with recognition, reconciliation, and restorative justice in response to genocide and other historical injustices.	• Australia- Commission of Inquiry • Brazil- National Truth Commission • Canada- Truth and Reconciliation Commission • DRC- Truth and Reconciliation Commission • Ecuador -The Truth Commission • Europe (multiple examples) - Reparations to Holocaust survivors • Gambia- Truth, Reconciliation, and Reparations Commission • Germany- Reparations to Israel • Guatemala- Historical Clarification Commission • Norway- Truth and Reconciliation Commission • Oregon- Remembrance Project • Poland- Institute of National Remembrance • Solomon Islands-Truth and Reconciliation Commission • Taiwan-Transitional Justice Commission • United States- Maine Wabanaki-State Child Welfare Truth and Reconciliation Commission • United States- National Memorial for Peace and Justice • Note-Additional examples named in HS.WH.CP.5
Civic Engagement (C.CE)	**6/7.C.CE.10**	Identify examples of attempts to limit the power and influence of government.	• Athenian democracy • Roman republic • Magna Carta • Peasant Revolt • Haitian Revolution

Geography (6/7.G)

Concept	Code	Standard	Examples include, but not limited to:
Geographic Reasoning (G.GR)	**6/7.G.GR.1**	Construct and use maps and other representations, technologies, and spatial thinking to compare how physical geography, human, and environmental characteristics of a region influenced the movement of people, goods, and ideas among civilizations and empires.	• Africa: Egypt, Axum, Kush, Songhai, Mali, Ghana, Kongo • Asia and India: Indus, Mughal, Persia, Qin, Han, Song, Mongol, Taungoo • European Empires and Nations States: Viking, HRE, Portugal, Spain, England, French, Dutch • Mesoamerica and South America: Toltec, Zapotec, Olmec, Maya, Aztec, Arawak, Inca • Middle East/Mediterranean: Greece, Mesopotamia, Rome, Ottoman, Arab/Muslim • N. America: Hopewell, Haudenosaunee, Mississippian, Pueblo
	6/7.G.GR.2	Using physical and political maps, identify and distinguish countries, capitals, other cities, and important bodies of water to describe, place, region, and the absolute location and relative location of cultures and civilizations.	• Africa: Egypt, Axum, Kush, Songhai, Mali, Ghana, Kongo • Asia and India: Indus, Mughal, Persia, Qin, Han, Song, Mongol, Taungoo • European Empires and Nations States: Viking, HRE, Portugal, Spain, England, French, Dutch • Mesoamerica and South America: Toltec, Zapotec, Olmec, Maya, Aztec, Arawak, Inca • Middle East/Mediterranean: Greece, Mesopotamia, Rome, Ottoman, Arab/Muslim • N. America: Hopewell, Haudenosaunee, Mississippian, Pueblo
Migration and Movement (G.MM)	**6/7.G.MM.3**	Explain how technological developments in transportation and communication affected interactions between human settlements, including the diffusion of ideas and cultural practices.	• Africa: Egypt, Axum, Kush, Songhai, Mali, Ghana, Kongo • Asia and India: Indus, Mughal, Persia, Qin, Han, Song, Mongol, Taungoo • European Empires and Nations States: Viking, HRE, Portugal, Spain, England, French, Dutch • Mesoamerica and South America: Toltec, Zapotec, Olmec, Maya, Aztec, Arawak, Inca • Middle East/Mediterranean: Greece, Mesopotamia, Rome, Ottoman, Arab/Muslim • N. America: Hopewell, Haudenosaunee, Mississippian, Pueblo
Human Interaction and Interconnection (G.HI)	**6/7.G.HI.4**	Identify and describe how the physical geography and human characteristics of places influence cultural attributes such as politics, law, religion, diet, architecture, and the construction of race, ethnicity, and gender.	• Africa: Egypt, Axum, Kush, Songhai, Mali, Ghana, Kongo • Asia and India: Indus, Mughal, Persia, Qin, Han, Song, Mongol, Taungoo • European Empires and Nations States: Viking, HRE, Portugal, Spain, England, French, Dutch

Concept	Code	Standard	Examples include, but not limited to:
			• Mesoamerica and South America: Toltec, Zapotec, Olmec, Maya, Aztec, Arawak, Inca • Middle East/Mediterranean: Greece, Mesopotamia, Rome, Ottoman, Arab/Muslim • N. America: Hopewell, Haudenosaunee, Mississippian, Pueblo
	6/7.G.HI.5	Identify and explain the consequences of cultural conflict, interaction, exchange, and/or fusion.	• Aztec provinces of Mexico before and after Cortes • Mali trade routes across Africa in the 14th Century • Chinese trade with India and East Africa during the Ming Dynasty • Spanish control of Pacific trade between Peru-Mexico-China-Philippines • The cultural influence of Alexander's empire in the Mediterranean and SW Asia • The religious influence of Islam from the 8th-15th century • Culture and religion along the Silk Road • The expansion of Pacific Islander cultures across the Pacific
Human Environmental Interaction (G.HE)	**6/7.G.HE.6**	Identify how physical environments influence and effect changes in population, technical advancements, culture, and approaches to resource use, stewardship, and sustainability from the Paleolithic to 900 CE.	• Africa: Egypt, Axum, Kush, Songhai, Mali, Ghana, Kongo • Asia and India: Indus, Mughal, Persia, Qin, Han, Song, Mongol, Taungoo • European Empires and Nations States: Viking, HRE, Portugal, Spain, England, French, Dutch • Mesoamerica and South America: Toltec, Zapotec, Olmec, Maya, Aztec, Arawak, Inca • Middle East/Mediterranean: Greece, Mesopotamia, Rome, Arab/Muslim • N. America: Hopewell, Haudenosaunee, Mississippian, Pueblo • Oceania: Tu'i Tonga
	6/7.G.HE.7	Identify and describe examples of how conquest and colonialism affected traditionally underrepresented identities, cultures, and communities.	• Forced migration and enslavement • Land use practices • Utilization of natural resources • Displacement • Conceptions of land ownership and stewardship

Economics (6/7.E)

Concept	Code	Standard	Examples include, but not limited to:
Earning, Saving, and Spending (E.ES)	**6/7.E.ES.1**	Compare the education and training requirements for at least two student selected career choices.	• CTE programs • Licensing and certification • Two- and four-year degrees • Graduate school
	6/7.E.ES.2	Create and discuss budgeting that includes realistic and locally relevant living expenses and savings for various income levels.	• Minimum wage • Earning potential of varying education levels • Cost of living
	6/7.E.ES.3	Identify tools to help budget and save money to make a large purchase in one year, 5 -years, and 10-years.	• Savings accounts and CDs • Prepaid debit cards • Budgeting apps
Micro and Macro Economics (E.MI)	**6/7.E.MI.4**	Explain how supply and demand affect wages and prices of resources.	• Rising wages due to low unemployment • Prices on goods with high demand • Elastic and inelastic goods
	6/7/E.MI.5	Analyze the role of consumers and producers in product markets.	• Computer and video games • Automobiles • Concert tickets
	6/7.EF.MI.6	Identify how the four factors of production combine to make goods and deliver services in capitalist economies.	• Land • Labor • Capital • Entrepreneurship
	6/7.EF.MI.7	Compare how different economic systems choose to allocate the production, distribution, and consumption of resources.	• Traditional • Command • Market • Mixed

Concept	Code	Standard	Examples include, but not limited to:
Incentives, Choice, and Consumer Behavior (E.IC)	**6/7.E.IC.8**	Explain how government interventions, such as incentives, taxes or tribute affect individual participation in the economy.	• Controlling production • Black-markets • Publicly funded infrastructure
	6/7.E.IC.9	Evaluate alternative approaches or solutions to economic issues in terms of benefits and costs for traditionally underrepresented groups and individuals in early major Western and non-Western civilizations.	• Early agriculture and labor • Long distance trade • Feudalism • Colonialism
Specialization, Trade, and Interdependence (E.ST)	**6/7.EF.10.ST**	Compare specialization and trade in two or more civilizations or empires.	• Africa: Egypt, Axum, Kush, Songhai, Mali, Ghana, Kongo • Asia and India: Indus, Mughal, Persia, Qin, Han, Song, Mongol, Taungoo • European Empires and Nations States: Viking, HRE, Portugal, Spain, England, French, Dutch • Mesoamerica and South America: Toltec, Zapotec, Olmec, Maya, Aztec, Arawak, Inca • Middle East/Mediterranean: Greece, Mesopotamia, Rome, Ottoman, Arab/Muslim • North America: Hopewell, Haudenosaunee, Mississippian, Pueblo
	6/7.EF.11.ST	Analyze the effect on the costs of goods and services for trade or barter with the development of specialization in local economies.	• Early agriculture and labor • Long distance trade • Guilds
	6/7.EF.12.ST	Explain how growing interdependence and technological advances improve living standards within and across societies.	• Availability of goods • Reduction of work time • Reducing costs • Expanding opportunities for participation

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History (6/7.H)

Concept	Code	Standard	Examples include, but not limited to:
Continuity and Change (H.CH)	**6/7.H.CH.1**	Construct and interpret a timeline using words and abbreviations for identifying key periods in the development of human societies.	• Era • Age • Decade, century, millennium • BCE/CE • Circa • Time immemorial • Lunar and solar • Linear and cyclical timelines
	6/7.H.CH.2	Explain the characteristics historians and social scientists have used to define complex societies or "civilizations." *Note- The characteristics remain a topic of debate for historians and archeologists and some societies do not include all listed characteristics.*	• The production of surplus food • Urban centers • Stratified social classes • Specialized occupations, economic systems • Systems of government, religion, and learning • Technology, art, and monumental architecture
	6/7.H.CH.3	Describe the key features and developments of independently formed civilizations and cultures between the Neolithic and 900 CE.	• Fertile Crescent/Mesopotamia (Iraq, Turkey, Iran, Syria, Israel, Lebanon, Palestine) • Egypt • Mesoamerica (Mexico & Guatemala) • Indus River Valley (India & Pakistan) • Yellow River (China) • Caral-Supe (Peru)
Conflict and Cooperation (H.CC)	**6/7.H.CC.4**	Use primary and secondary sources to identify and analyze the interactions and exchanges of cultures and civilizations from the Neolithic to 900 CE.	• Trade and technology • Diplomacy and warfare • Agriculture • Pathogens • Language • Religion • Friendship and marriage

Concept	Code	Standard	Examples include, but not limited to:
	6/7.H.CC.5	Use primary and secondary sources to identify and analyze the interactions and exchanges of cultures and civilizations after 600 CE.	• Colonialism • Trade and technology • Diplomacy and warfare • Agriculture • Pathogens • Language • Religion • Friendship and marriage
	6/7.H.CC.6	Identify examples of historical and contemporary indigenous resilience and resistance to colonial exploration and settlement.	• Aboriginal resistance in Australia • Inca and Guarani resistance to Spanish Colonialism • Standing Rock • Preservation of language and culture • Polynesian Voyaging Society
Cause and Effect (H.CE)	**6/7.H.CE.7**	Identify and describe examples of how conquest and colonialism affected historically underrepresented identities, cultures, and communities.	• Land use practices • Utilization of natural resources • Displacement • Conceptions of land ownership and stewardship • Lifeways • Gender identities and roles • Social hierarchy and status
Communities and Pluralism (H.CP)	**6/7.H.CP.8**	Compare the origins and development of early world religions from the Neolithic to 1500 CE.	• Indigenous religious traditions • Polytheism • Monotheism • Animism
	6/7.H.CP.9	Identify the key components of creation or origin stories from various civilizations and cultures.	• Deities and acts of creation • Order and chaos • Formation of earth and humans • Cultural values and beliefs • Cyclical or linear narratives

Concept	Code	Standard	Examples include, but not limited to:
	6/7.H.CP.10	Compare and contrast the central tenets and cultural practices of Hinduism, Judaism, Buddhism, Taoism, Christianity, and Islam.	• Characteristics of the belief system • Significant texts, practices, and sites • Effect of the belief system on daily life • Relationship between the belief system and government
	6/7.H.CP.11	Investigate the historical origins and modern manifestations of anti-Judaism. *Note: Anti-Judaism refers to the bias, discrimination, and violence experienced by Jewish individuals and communities throughout history primarily rooted in religious identity. Antisemitism is the prejudice, discrimination, hostility, or violence directed toward Jewish people or communities and their religious, cultural, and ethnic identity.*	• The Diaspora of 70 CE and medieval early anti-Judaism • Spanish Inquisition and other persecutions and expulsions in Europe • Social and economic stereotypes • Religious intolerance • 19th-century pseudo-science about race and national identity • Pogroms • Historical roots of the Holocaust • Modern antisemitism
	6/7.H.CP.12	Identify the motivations and methods governments and other institutions use to create, reinforce, or address injustice and divisions in society.	• Racism • Sexism • Caste • Antisemitism • Stereotypes • Prejudice • Discrimination
	6/7.H.CP.13	Use primary and secondary sources to identify archaeological evidence of the characteristics of Indigenous civilizations of the Americas and Caribbean basin from the Paleolithic to 1500.	• Cliff dwellings and rock shelters • Mound-building • Monumental architecture • Urban centers • Irrigation systems • Calendars • Stone tools, pottery & baskets • Agricultural and horticultural practices • Long distance trade • Pictographs and petroglyphs • Religion and spiritual practices and beliefs

Concept	Code	Standard	Examples include, but not limited to:
	6/7.H.CP.14	Use primary and secondary sources to identify the important characteristics of civilizations and cultures in Western Asia, the Middle East, and North Africa from Paleolithic to 1500.	• Monumental architecture • Urban centers • Stone tools, carving, sculptures, & pottery • Calendars • Irrigation systems • Agricultural and horticultural practices • Long distance trade • Metalsmithing • Writing systems • Important technologies • Religion and spiritual practices and beliefs
	6/7.H.CP.15	Use primary and secondary sources to identify the important characteristics of civilizations and cultures in Sub-Saharan Africa.	• Monumental architecture • Urban centers • Carvings, sculptures • Calendars • Irrigation systems • Agricultural and horticultural practices • Long distance trade • Metalsmithing • Important technologies • Religion and spiritual practices and beliefs

Grade 8 Standards (US History 1780-1865)

The focus in grade 8 is to build upon knowledge of early U.S. History in grade 5. Students look more closely into the democratic concepts inherited from Greece and Rome, the influence of Enlightenment thinkers, and the contributions of Native American political ideas on the construction of the Constitution and the democratic principles and values of the early Republic. Importantly, these standards encourage students to evaluate the persistent impact of racism, sexism, and other forms of prejudice on laws, treaties, and Supreme Court decisions throughout American history. Students explore the methods and movements that have advocated for the expansion of justice, equality, and equity for historically underrepresented individuals and groups.

As students engage with these standards, they have many opportunities to strengthen their literacy skills through close reading, analysis, and evaluation of complex texts, as well as through writing assignments that require critical thinking and argumentation. The standards require engagement with current events and ongoing debates. When appropriate, it is helpful to explicitly connect the issues of the 18th and 19th century with the events students encounter in the world around them. Encouraging students to draw parallels between historical events and contemporary issues will not only deepen their understanding, but also foster their ability to become informed and engaged citizens.

Essential Disciplinary Practices

I. Develop **questions** for social science inquiry.	II. Use **chronological thinking skills,** connecting the past with the present to recognize continuity and change in human history.	III. Collect, interpret, evaluate, and apply information from **primary and secondary sources** to better understand and create historical narrative distinguishing between fact and opinion.	IV. Seek and analyze diverse perspectives to develop **a more complete understanding of past** and current events.	V. Evaluate and assess how discrimination, racism, and inequality create **historical narratives, individual perspectives**, intersecting identities, and diverse understandings of the past and present.
VI. Construct well-reasoned and logically coherent **explanations, arguments, and solutions** related to complex societal issues.	VII. Cultivate **global awareness and cultural understanding** to effectively engage with diverse cultures and perspectives in an interconnected world.	VIII. Demonstrate empathy to understand how **identities** shape actions of resistance and resilience among individuals and communities.	IX. Develop the necessary skills to critically analyze and evaluate **digital and social media** content, identify reliable sources, and become more informed and responsible digital citizens.	X. Apply the practices and knowledge of social science to determine the most effective ways to take **informed civic action**.

Civics (8.C)

Concept	Code	Standard	Examples include, but not limited to:
Political Institutions (C.PI)	**8.C.PI.1**	Explain the significance of the influence of the democratic political concepts of ancient Greece and Rome on the structure and ideas of the Founders and the Constitution.	• Civic participation and duty • Voting rights • Trial by jury • Legislative bodies • Constitution writing • Rule of law • Separation of powers • Representative government
	8.C.PI.2	Explain the influence of the Enlightenment and Native American political ideas and documents on the American Revolution and the framework of the American government.	• Natural Rights and Locke • Social Contract and Rousseau • Separation of Powers and Montesquieu • Confederacy and the Haudenosaunee
	8.C.PI.3	Identify the reasons for the failure of the Articles of Confederation and the adoption of the U.S. Constitution.	• Weak central government • Lack of funding • Unanimous requirement for amendment • Shay's Rebellion
	8.C.PI.4	Examine and analyze significant primary source documents establishing, limiting, or denying civil rights in the United States and Oregon.	• Mayflower Compact (1620) • Declaration of Independence (1776) • Articles of Confederation (1777) • Federalist Papers 1, 10, and 51 (1787) • U.S. Constitution (1789) • Bill of Rights (1791) • Oregon Constitution (1857)
	8.C.PI.5	Evaluate how the persistence of racism, sexism, and other forms of prejudice, affected laws, treaties, and Supreme Court decisions from 1787 to 1865 on sovereignty, status, rights, and liberties of historically underrepresented individuals and groups.	• Treaties between Native American Tribes and US Government (1789-1890) • Virginia Declaration of Rights • Johnson v. M'Intosh and Doctrine of Discovery (1823) • Indian Removal Act (1830) • Cherokee Nation v. Georgia (1831) • Worcester v. Georgia (1832) • Elements of U.S. Constitution, including: • Article I Section 8 • Article I Section 2 • Article I Section 9

Concept	Code	Standard	Examples include, but not limited to:
			• Article IV Section 2 Clause 3 • Article VI • Married Women's Property Act • Fugitive Slave Acts (1793 & 1850) • Oregon Donation Land Claim Act (1850) • What to the slave is the Fourth of July? (1852) • Dred Scott v Sanford (1857)
	8.C.PI.6	Compare and contrast the United States republican form of government to direct democracy, theocracy, oligarchy, authoritarianism, and monarchy.	• Representative government • Town meeting • Religious leadership • Divine Right • Dictatorship • Elite rule
	8.C.PI.7	Explain the process of elections in the legislative and executive branches, and the process of nomination/confirmation of individuals in the judicial and executive branches.	• Majority rule and individual rights • Popular vote and electoral college • Ballot measures and Constitutional amendment process 160
	8.C.PI.8	Examine the interconnection of governing power and responsibility in the system of checks and balances.	• Congress: enumerated powers, general powers, limits on power, checks on the other two branches; roles of political parties in the organization of Congress; roles within the legislative branch, such as the Speaker of the House, the President of the Senate, minority party leaders; the system for accomplishing legislation, including committees, hearings, and legislative procedures • The Presidency: roles, powers and limits, checks on other two branches, role of the Cabinet, such as the Vice President, Attorney General and Secretaries of State, Defense, Health and Human Services, Homeland Security; executive departments and agencies (such as the Department of Education, the Federal Bureau of Investigation, or the Food and Drug Administration), and branches of the military • The Supreme Court: role and powers, checks on other two branches, lower courts

Concept	Code	Standard	Examples include, but not limited to:
Identity, Roles, and Responsibilities (C.IR)	**8.C.IR.9**	Identify and understand how to apply the rights and responsibilities of individuals under the Constitution.	• Bill of Rights • 14th Amendment • Responsibilities of citizenship
Democratic Principles (C.DP)	**8.C.DP.10**	Analyze important political and ethical values for individual rights and their lasting effect on the status, rights, and liberties of historically underrepresented individuals and groups embodied in documents such as the Declaration of Independence, the United States and Oregon Constitutions, and the Bill of Rights.	• Freedom • Liberty • Democracy • Equality • Equity
	8.C.DP.11	Analyze issues involving liberty in conflict with equality or authority, individual rights in conflict with the common good, or majority rule in conflict with minority rights.	• Privacy rights vs. security concerns • Property rights vs. environmental protections • Helmet, seatbelt, or second-hand smoking laws • Religious liberty, free speech, due process, civil rights
Civic Engagement (C.CE)	**8.C.CE.12**	Examine the evolution of political parties and interest groups and their effect on events, issues, and ideas.	• Federalist vs Anti-Federalists • The use of advertising and propaganda • Democratic-Republicans • Abolition and expansion of slavery • 19th -century immigration
	8.C.CE.13	Identify the methods of individuals and movements responsible for the expansion of justice, equality, equity, rights, and responsibilities of citizenship from historically underrepresented groups at the local and national levels.	• Enlightenment ideas • Abolitionist movement • Women's rights • Worker's rights • Native American resistance and treaty rights
	8.C.CE.14	Evaluate the historical and contemporary means of attempting to create more inclusive societies, including the importance of advocacy and activism related to the expansion of justice, equality, and equity for historically underrepresented individuals and groups.	• Abolitionist movement • Senecca Falls convention • Cherokee Constitution • Current issues

Geography (8.G)

Concept	Code	Standard	Examples include, but not limited to:
Geographic Reasoning (G.GR)	**8.G.GR.1**	Construct and use maps and other representations, technologies, and spatial thinking to understand changes in the demographic composition of North America.	• North American Atlantic coast tribal lands • Colonial settlement patterns • Westward expansion of U.S. states into areas inhabited by Indigenous Tribes • Regional differences below and above the Mason-Dixon line • Competing claims in the Southwest (New Spain, France, Mexico, Texas
	8.G.GR.2	Interpret maps to identify the changes in political geography, population, and economic development of the United States.	• Expansion after the American Revolution • Louisianna Purchase • Oregon Territory • Annexation of Texas • "Free states" and states allowing for enslavement
Migration and Movement (G.MM)	**8.G.MM.3**	Identify and describe the causes and effects of migration, settlement, and cultural diffusion, in the expansion of the United States after the American Revolution until the end of the Civil War.	• Indigenous lands and peoples • Expansion of slavery • Settlement and experiences of immigrants
	8.G.MM.4	Investigate the effects of migration on immigrants and the culture where they settle.	• Preservation or assimilation of cultural traits and memories • The introduction and adoption of goods, ideas, games, and written and spoken language from country of origin • The adoption of technology, food, and customs

Concept	Code	Standard	Examples include, but not limited to:
Human Interaction and Interconnection (G.HI)	**8.G.HI.5**	Identify and explain examples of the influence of physical geography on human cultural elements such as law, religion, diet, and architecture.	• Locally available building materials • Locally sourced flora and fauna • Religious or spiritual significance of geographic features
	8.G.HI.6	Identify and describe how the physical and human characteristics of places and regions connect to human identities and cultures.	• Natural resources and foods • City vs. agrarian lifestyles • Religious practices and sites • Traditional clothing • Art and architecture
Human Environmental Interaction (G.HE)	**8.G.HI.7**	Identify and describe examples of how conquest and colonialism in North America affected Indigenous peoples' identities, cultures, and communities.	• Land use practices • Utilization of natural resources • Displacement • Conceptions of land ownership and stewardship • Availability of food and effects on diet • Missionary conversions and forced education

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Economics (8.E)

Concept	Code	Standard	Examples include, but not limited to:
Earning, Saving, and Spending (E.ES)	**8.E.ES.1**	Compare the education and training requirements, income potential, and primary duties of at least two jobs available to high school students.	• CTE programs • Service • Retail • Labor • Minimum wage
	8.E.ES.2	Discuss how unexpected life situations can affect financial well-being and savings plans.	• Unexpected layoffs • Accident • Medical emergency • Natural disaster • Identity theft
	8.E.ES.3	Explain how compound interest can generate both wealth and debt.	• Savings accounts • Credit card debt • Adjustable and fixed interest rates
	8.E.ES.4	Define and analyze the concept of "fair lending practices" and the history of discrimination and systemic inequalities in the US financial system.	• Gender and racial discrimination in lending • Redlining and restrictive housing covenants • Home installment contracts • Forced redistribution of land

Micro and Macro Economics (E.MI)	**8.E.MI.5**	Explore varying viewpoints on the role and purpose of taxation and government spending historical and contemporary debate.	• Lower taxes & limited government spending • Increased taxes & social programs • Government intervention to stabilize the economy • Redistribution of wealth & reduction of inequality
	8.E.MI.6	Explain the role of forced and exploitative labor systems in the economic development of the United States.	• Indenture • Peonage and convict leasing • Enslavement and chattel slavery • Sharecropping • Migrant and immigrant labor • Child labor
	8.E.MI.7	Identify the positive and negative effects of technology on labor.	• Transportation and shipping • Manufacturing • Textiles • Agriculture • Communication 165
Incentives, Choice, and Consumer Behavior (E.IC)	**8.E.IC.8**	Assess the effect of business growth and expansion on the allocation of resources and economic incentives.	• Local job creation • Infrastructure development • Tax revenue • Resource consumption • Pollution
Specialization, Trade, and Interdependence (E.ST)	**8.E.ST.9**	Explain how regional specialization created economic interdependence among the regions of the United States between 1783-1865.	• Southern cotton production and Northern textile mills • Transportation networks • Tariffs

History (8.H)

Concept	Code	Standard	Examples include, but not limited to:
Continuity and Change (H.CH)	**8.H.CH.1**	Identify the significant political developments surrounding the territorial expansion of the United States in the early republic (1776-1865).	• Haitian Revolution • Louisiana Purchase • War of 1812/Tecumseh's war • Policy of tribal removal • Monroe Doctrine • Annexation of Texas • War with Mexico • Oregon Territory • Dakota Wars
	8.H.CH.2	Utilize the grade 8 Tribal History Shared History resources and other Indigenous voices to examine the differing forms of oppression, including cultural and physical genocide, faced by Indigenous Tribes and acts of resilience and resistance used by Indigenous peoples in response to settler-colonialism.	• Armed resistance • Cultural persistence • Language preservation • Treaties • Cooperation and trade • Alliances • Adoption and adaptation of cultural practices
Conflict and Cooperation (H.CC)	**8.H.CC.3**	Discuss the ongoing debate on attempts at restorative justice to address historic and ongoing injustice.	• Recognition • Restitution • Restoration • Reparations • Reconciliation
	8.H.CC.4	Analyze resistance to enslavement through research of primary sources such as newspapers, narratives, accounts of slave auctions, and political and legal records.	• The Stono Rebellion of 1739 • The Haitian Revolution of 1791–1804 • Gabriel's Conspiracy 1800 • German Coast Uprising, 1811 • The rebellion of Denmark Vesey of 1822 • The rebellion of Nat Turner in 1831 • Self-emancipation • Maroon Communities • Plantation sabotage • The role of the Underground Railroad • Black Press, Abolitionist societies, The Black church

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Concept	Code	Standard	Examples include, but not limited to:
Cause and Effect (H.CE)	**8.H.CE.5**	Explain the effects of discoveries and technologies in the 18th and 19th centuries on the political and cultural development of the United States, including the expansion of slavery and the taking of Indigenous lands.	• Developments in agriculture such • Increasing speed of transportation • Communication methods • Telegraph • Photography
	8.H.CE.6	Analyze how economic, religious, social, ideological, and political developments led to sectional and national tensions, inspiring reform movements and political and social divisions between 1800-1860.	• Second Great Awakening • Abolitionist movements • Women's Rights • Temperance • Labor tensions • Expansion of slavery
	8.H.CE.7	Evaluate the growing political tensions between 1820-1861 over the institution of slavery within the United States, leading to the Civil War.	• Missouri Compromise (1820) • Nat Turner Rebellion (1831) • Nullification Crisis (1832) • Compromise of 1850 (1850) • Kansas-Nebraska Act (1854) • Dred Scott Decision (1857) • Harper's Ferry (1858)
	8.H.CE.8	Identify and analyze the political and military significance of the Civil War.	• Industrialization of warfare • Preservation of the Union • Emancipation Proclamation • Reconstruction • Trench warfare, Ironclad ships, repeating rifles
Communities and Pluralism (H.CP)	**8.H.CP.9**	Use primary and secondary sources to evaluate how intersecting identities including, gender identity, sexual orientation, age, race, ethnicity, religion, physical and mental ability, and class affect the living histories and experiences of peoples, groups, and events.	• Personal accounts and diaries • Religious sermons • Newspaper articles • Art and music
	8.H.CP.10	Identify and explain the contributions and experiences of individuals from traditionally underrepresented identities in Oregon and the United States.	• American Indian/Alaska Native/Native Hawaiian • Americans of African, Asian, Pacific Island, Chicano, Latino, Middle Eastern or Jewish descent • Immigrants or refugees • Various religious identities • Lesbian, gay, bisexual, and transgender identities

High School Standards (Focus: US Post 1865 and Modern World Post 1750)

The high school standards provide students with opportunities to develop a deep understanding of government, political parties, interest groups, and media. Emphasizing an analysis of multiple perspectives, students identify historical and contemporary efforts to address discrepancies between democratic ideals and realities for underrepresented groups. The economics standards explore market economies, supply and demand dynamics, and the roles of various economic actors and institutions.

The history standards facilitate an analysis of continuity and change, conflicts, and cooperation, causes and effects, and the diverse experiences within U.S. and world history. For U.S. history from 1865 to the present, students examine social, political, and economic changes following the Civil War, including Reconstruction and late 19th and early 20th century attempts at expanding the rights underrepresented groups. Students analyze economic growth, the evolving role of government, and efforts to reduce inequalities. Crucially, students evaluate actions and methods used by underrepresented groups to achieve expanded rights and liberties. Additionally, students trace the evolving role of U.S. foreign policy from the Monroe Doctrine to the present day, exploring conflicts and compromises that shaped the U.S. as a global power.

For world history, students analyze the development of nationalism and nation-states and the types of governments that shaped the 20th century. They explore superpower rivalries, the rise of international organizations during the Cold War era, and efforts at global cooperation and development. A significant new addition to the US and World History standards includes an exploration of the events and policies of the Holocaust, the international community's response, and efforts to hold perpetrators accountable. Students also analyze the conditions and response of the world community to other 20th-century genocides through international tribunals and truth and reconciliation commissions.

Essential Disciplinary Practices

I. Develop **questions** for social science inquiry.	II. Use **chronological thinking skills,** connecting the past with the present to recognize continuity and change in human history.	III. Collect, interpret, evaluate, and apply information from **primary and secondary sources** to better understand and create historical narrative distinguishing between fact and opinion.	IV. Seek and analyze diverse perspectives to develop **a more complete understanding of past** and current events.	V. Evaluate and assess how discrimination, racism, and inequality create **historical narratives, individual perspectives**, intersecting identities, and diverse understandings of the past and present.
VI. Construct well-reasoned and logically coherent **explanations, arguments, and solutions** related to complex societal issues.	VII. Cultivate **global awareness and cultural understanding** to effectively engage with diverse cultures and perspectives in an interconnected world.	VIII. Demonstrate empathy to understand how **identities** shape actions of resistance and resilience among individuals and communities.	IX. Develop the necessary skills to critically analyze and evaluate **digital and social media** content, identify reliable sources, and become more informed and responsible digital citizens.	X. Apply the practices and knowledge of social science to determine the most effective ways to take **informed civic action**.

Civics (HS.C)

Concept	Code	Standard	Examples include, but not limited to:
Political Institutions (C.PI)	**HS.C.PI.1**	Investigate and compare core elements of early governments that were influential and evident in the United States government structure.	• Athenian democracy • Roman republicanism • Enlightenment ideals • Haudenosaunee Confederacy
	HS.C.PI.2	Compare and contrast the United States republican form of government to direct democracy, theocracy, oligarchy, authoritarianism, and monarchy.	• Representative government • Town meeting • Religious leadership • Divine Right • Dictatorship • Elite rule
	HS.C.PI.3	Examine and compare institutions, functions, and processes of government.	• Local • Tribal • County • State • Federal
	HS.C.PI.4	Using the Tribal History/Shared History resources and other primary and secondary source documents, identify and explain the development and mechanisms for the government-to-government relationship between Oregon and the nine federally recognized tribal governments.	• 2001 Senate Bill 770 • Executive Order 96-30 • Legislative Commission on Indian Services • Specific tribal governments
	HS.C.PI.5	Explore and explain the historical evolution of the debate over the role, function, and size of the federal branches of government.	• Federalism • Necessary and proper (Elastic clause) • Presidential use of executive orders • Congressional use of filibuster • Judicial use of the shadow docket • Federal agencies' rule-making power

Concept	Code	Standard	Examples include, but not limited to:
	HS.C.PI.6	Analyze and evaluate a landmark United States Supreme Court case addressing principles of federalism.	• Separation of powers • Republican government • Voting rights • Individual rights
	HS.C.PI.7	Compare core documents associated with the protection of individual rights.	• The U.S. Bill of Rights • The 14th Amendment • Article I of the Oregon Constitution • Dept. of Education Title VI and Title IX • Universal Declaration of Human Rights • International Covenant on Civil and Political Rights • Convention on the Elimination of All Forms of Racial Discrimination
Identity, Roles, and Responsibilities (C.IR)	**HS.C.IR.8**	Using primary sources from multiple perspectives, discuss and debate the central ideas of the government of the United States and Oregon.	• Popular sovereignty • Tribal sovereignty • Limitations of rights based on race, gender, and age • Constitutionalism • Republicanism • Federalism • Individual rights • The social contract • Natural rights
	HS.C.IR.9	Describe the civic behaviors that promote and strengthen a pluralistic democracy.	• Cooperation and compromise • Joining an organization or participating in the community • Engaging with multiple perspectives • Civic activism • Critical thinking • Journalism • Voting in elections • Military service • Volunteering • Holding public office

Concept	Code	Standard	Examples include, but not limited to:
	HS.C.IR.10	Analyze how political parties, interest and community groups, corporations, and mass media influence the beliefs and behaviors of individuals, and the policies and laws adopted by local, state, and national governments.	• Advertising • Fund raising • Grassroots & astroturfing • Lobbying • Campaign contributions
	HS.C.IR.11	Identify and explain the roles and responsibilities of branches and agencies responsible for the foreign policy of the United States.	• Wars • Trade • Treaties • Diplomacy
Democratic Principles (C.DP)	**HS.C.DP.12**	Using primary sources from multiple perspectives, identify and explain historical and contemporary efforts to narrow discrepancies between foundational ideas and values of American democracy and the realities of American political and civic life for traditionally underrepresented groups.	• Women's rights organization: National Organization of Women • Black Power Organizations: Black Panther Party • Chicano Movement: La Raza Unida Party • LGBTQ2IA+: Human Rights Campaign • Native American: American Indian Movement • People with Disabilities: American Association of People with Disabilities • Asian American: Asian American Political Alliance • Jewish American: Anti-Defamation League
	HS.C.DP.13	Argue and defend positions on contemporary issues in which foundational ideas or values are in tension.	• Majority rule and individual rights • Popular vote and Electoral College • Liberty and equality • Equity and equality • Individual rights and community interests • Freedom and security
	HS.C.DP.14	Identify and analyze the existence and perpetuation of discrimination and inequity in the local, state, national, or context.	• Employment discrimination • Healthcare disparities • Environmental impacts • Educational inequities

Concept	Code	Standard	Examples include, but not limited to:
	HS.C.DP.15	Identify and evaluate the effect of the exclusionary language and intent of the Oregon and U.S. Constitution and the provisions and process for expanding and protecting civil rights.	• Oregon Constitution: Article I Sec. 1-20 • Oregon Constitution: Article II Sec. 6 • Oregon Constitution: Article II XV Sec. 8 • US Constitution: Article 1 Sec. 2 • US Constitution: Article 4 Sec. 2 • Amendments to US Constitution
	HS.C.DP.16	Identify the requirements and process for voting.	• Citizenship, age, residency • Registration and process • Mail and in-person ballots and voter guides • Absentee voting • Counting and certification
Civic Engagement (C.CE)	**HS.C.CE.17**	Explain how active citizens and political or social movements can affect the lawmaking process locally, nationally, and internationally.	• Advocacy and lobbying • Social/political movements • Civil disobedience • Litigation and legal advocacy
	HS.C.CE.18	Identify and assess the planning and methods groups facing discrimination used to achieve access to voting, as well as expansion of rights and liberties from 1865 to the present.	• Women's rights • Lesbian, Gay, Bisexual, Transgender, and Queer (LGBTQ2IA+) Civil Rights Movement • Disability rights and justice movement • Environment movement • Health and rights of workers • Native American rights, self-determination, sovereignty
	HS.C.CE.19	Compare the debate over a public policy issue from the past with a contemporary issue and evaluate the role of political parties, interest groups, social movements, and media in influencing public opinion.	• Labor • Environment • Disability rights • Voting • Education

Geography (HS.G)

Concept	Code	Standard	Examples include, but not limited to:
Geographic Reasoning (G.GR)	**HS.G.GR.1**	Use geographic tools, various kinds of maps, and geospatial technologies to examine geographic components of past and current world events or to solve geographic problems.	• GIS, GPS, remote sensing • Natural disasters • Humanitarian crises • Climate change • Global pandemics • War
Migration and Movement (G.MM)	**HS.G.MM.2**	Analyze recent voluntary and forced migration patterns to identify and understand the push and pull factors and their effect on people and places.	• Conflicts and violence • Economic hardship and opportunities • Environmental degradation • Climate change • Persecution and discrimination • Family reunification • Freedom and justice • Political and social response to immigration
	HS.G.MM.3	Investigate and analyze how political and economic decisions determine the settlement patterns of human populations, including the removal and segregation of communities in the United States.	• Westward expansion of the United States • Dispossession of Indigenous lands • Creation of urban ghettos and food deserts • The Great Migration • Practice of redlining • Oregon's Vanport and "Sundown Towns" • Development of suburbs • Development of the "Sunbelt" • Land use policy and rural areas • Gentrification
	HS.G.MM.4	Investigate and analyze the migration and settlement patterns of human populations, including the removal and segregation of communities in past and in current societies globally.	• Relocation due to infrastructure projects • War refugees and displaced persons • Expulsion and removal for "ethnic cleansing" • Discrimination, prejudice, and racism • Response to natural disaster or environmental degradation

Concept	Code	Standard	Examples include, but not limited to:
	HS.G.MM.5	Explain how changes in transportation and communication technology affect the spatial connections among human settlements and the diffusion of ideas and cultural practices including religious beliefs, economic exchange, and languages.	• Urbanization • Increased mobility • Expansion of trade networks • Globalization of information • Religious and ideological movements
Human Interaction and Interconnection (G.HI)	**HS.G.HI.6**	Identify the effects of geographical factors on the interactions among societies.	• Bodies of water • Mountains • Deserts • Climate • Presence or scarcity of natural resources • Population density
	HS.G.HI.7	Assess the effect of human settlement activities on the environmental and cultural characteristics of specific places and regions.	• Size and density of the population • Ethnic and religious makeup • Language • Art and music • Values associated with land use such as stewardship vs. ownership • Architecture and infrastructure • Political organization
	HS.G.HI.8	Identify examples of conflict and cooperation involving the use of land and natural resources.	• Border disputes over natural resources such as water • Wars, including acts of genocide, for the acquisition of land • Agreements and settlements to share resources • International immigration policies

Concept	Code	Standard	Examples include, but not limited to:
Human Environmental Interaction (G.HE)	**HS.G.HE.9**	Explain how technological developments, societal decisions, and personal practices influence global resource consumption patterns, conservation, and environmental sustainability.	• International shipping • Development of highway systems • Individual automobile ownership • Residential zoning decisions • Technology and alternative energy resources
	HS.G.HE.10	Evaluate efforts at the local, national, or international level to address the use of limited or environmentally harmful resources.	• Campaigns to alter consumption patterns • Approaches to land and resource stewardship • Assessment of carbon footprint • Mitigation and adaptation strategies • International summits on climate
	HS.G.HE.11	Identify and describe how the relationship to land, utilization of natural resources, displacement, and land ownership affects historically underrepresented identities, cultures, and communities.	• Native American tribal lands and reservations • Sovereignty and autonomy • Indigenous lands and corporate extraction contracts • Voluntary or forced migration • Establishment of political boundaries

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Economics (HS.E)

Concept	Code	Standard	Examples include, but not limited to:
Micro and Macro Economics (E.MI)	**HS.E.MI.1**	Define supply and demand and explain the factors that determine the production and distribution of goods and services in a market economy.	• Supply and demand dynamics • Prices, profits, and competition • Government policies and interventions • Consumers and producers
	HS.E.MI.2	Create and explain economic models of supply and demand.	• An economic graph showing supply and demand • Identifying determinants of supply and demand • Shifting curves on a diagram or graph
	HS.E.MI.3	Analyze the effects of shortages and surpluses on supply and demand.	• Effects on prices • Consumer behavior • Incentives for suppliers • Illegal markets • Innovation • Government intervention
	HS.E.MI.4	Explain and give examples of the roles the government may play in a market economy.	• Provision of public goods and services • Redistribution of income • Protection of property rights • Resolution of market failures • Government bailouts • Setting interest rates • Tax incentives
	HS.E.MI.5	Explain the role of banks and other financial institutions in the market economy of the United States and analyze the reasons for banking crises.	• Intermediaries between savers and borrowers • Payment services • Risk management • Liquidity shortages • Asset quality issues • Regulatory failures
	HS.E.MI.6	Describe the intent and functions of the Federal Reserve System.	• Monetary policy • Bank regulation • Payment systems • Financial stability

Concept	Code	Standard	Examples include, but not limited to:
	HS.E.MI.7	Assess the health of the U.S. economy by applying the economic indicators of inflation, deflation, Gross Domestic Product (GDP), and unemployment from 1865 to the present.	• Financial panics of 1873 and 1893 • Roaring Twenties • Great Depression • Post WWII economic growth • Great Recession
Incentives, Choice, and Consumer Behavior (E.IC)	**HS.E.IC.8**	Explain how consumers and producers confront the condition of scarcity by making choices that involve opportunity costs and tradeoffs.	• Buying decisions • Long-term financial planning • Maximizing utility • Minimizing inefficiencies
	HS.E.IC.9	Analyze the effect of global events such as wars and technological developments on industry and consumers.	• Consumer demand • Raw materials • Supply chains • Innovation and productivity • Government interventions
	HS.E.IC.10	Describe the potential intended and unintended benefits and negative consequences of government economic programs and policies on the welfare and well-being of individuals and groups including traditionally underrepresented groups.	• American Indian/Alaska Native/Native Hawaiian • Americans of African, Asian, Pacific Island, Chicano, Latino, Middle Eastern or Jewish descent • Immigrants or refugees • Various religious identities • Lesbian, gay, bisexual, and transgender identities
Specialization, Trade, and Interdependence (E.ST)	**HS.E.ST.11**	Analyze the role of comparative advantage in the international trade of goods and services.	• Specialization and efficiency • Mutual gains through trade • Supply chain interdependence • Political and social response
	HS.E.ST.12	Identify the basic characteristics of monopoly, oligopoly, monopolistic competition, and perfect competition.	• Number of producers • Level of consumer choice • Product differentiation • Price and non-price competition • Allocation of resources • Barriers to entry

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Concept	Code	Standard	Examples include, but not limited to:
	HS.E.ST.13	Explain how international economic trends and policies affect political, social, and economic conditions in various nations.	• Political stability • Social welfare • Environmental and resource development • Interdependence • Migration
	HS.E.ST.14	Summarize the role and effect of economic institutions within market economies.	• Labor unions • Multinationals • Nonprofit organizations
	HS.E.ST.15	Analyze the effect on national and global markets of the use of slavery and other exploitative labor systems in the development of the U.S. infrastructure, wage competition, trade, and standards of living.	• Indenture • Peonage • Convict leasing • Sharecropping • Bracero program and migrant labor • Chinese immigrant labor • Contemporary prison labor

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US History (HS.US) 1865-Present

Concept	Code	Standard	Examples include, but not limited to:
Continuity and Change (US.CH)	**HS.US.CH.1**	Analyze social, political, and economic continuity and change following the Civil War and Reconstruction (1865-1896) with attention to how post-war policies and actions affected traditionally underrepresented groups and individuals.	• The need for federal troop presence in the South • Intent and implications of the 13th, 14th, and 15th Amendments and the idea of a "second founding" • Freedmen's Bureau and organizations for Black equality • Establishment and expansion of Freedmen's towns • Accomplishments and limitations of Radical Reconstruction • Continued expansion and settlement on Indigenous lands • Growth of industry and labor tensions
	HS.US.CH.2	Using primary sources from multiple perspectives, identify and analyze developments in the growth of the US economy, the changing role of government, and efforts of individuals and organizations attempting to reduce political, economic, and social inequalities in the 20th century.	• Economic policies and labor unions • Progressive Era reforms and regulations • New Deal and Great Society Programs • Women's suffrage and Civil Rights • Activism for LGBTQ2SIA+ Equality 179
	HS.US.CH.3	Analyze the foreign policy statements of the United States to trace the changing role of United States intervention in global affairs from 1823 to the present.	• Washington's Farewell Address • Monroe Doctrine • Interventionism • Isolationism • Roosevelt Corollary • "Making the world safe for democracy." • Good Neighbor Policy • US interventions in Latin America • Truman Doctrine • Kennedy Doctrine • Containment • Bush Doctrine

Concept	Code	Standard	Examples include, but not limited to:
	HS.US.CH.4	Identify and analyze the developments and consequences of significant changes in technology on American society and culture from 1865-present:	• Industrialization and assembly lines • Automobiles • Electricity and communication • Wartime mobilization • Leisure time • Medical discoveries • Sanitation systems • The Internet
Conflict and Cooperation (US.CC)	**HS.US.CC.5**	Analyze primary sources from multiple perspectives to develop an argument about how the conflict between traditionalism and modernity in the early 20th century generated both progress and backlash on issues of justice and equality.	• Harlem Renaissance and modern art • Shifting immigration patterns and Great Migration • Reemergence of the Ku Klux Klan • Increasing role of women in the workplace • Debates over evolution and role of religion in public life • The visibility of same-sex (LGBTQ2SIA+) relationships • Prohibition and the “Jazz Age”
	HS.US.CC.6	Identify global conflicts and compromises to evaluate actions of the United States as an emerging global power between 1890-1945.	• Acquisition of lands beyond North America • Spanish-American War • Military interventions in the western hemisphere • World War I • League of Nations • Economic intervention and cooperation • WWII • United Nations
	HS.US.CC.7	Analyze how the differing ideologies and policies of the United States and the Soviet Union contributed to conflict and cooperation in multiple continents during the Cold War Era between 1945-1991.	• Military Interventions • Economic intervention and cooperation • Clandestine or covert operations • NATO (North Atlantic Treaty Organization) • Warsaw Pact • International Monetary Fund • Peace Corps

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Concept	Code	Standard	Examples include, but not limited to:
	HS.US.CC.8	Identify how Cold War tensions between the United States and the Soviet Union shaped domestic attitudes, culture, and policies.	• Anti-Communism campaigns • Nationalism and patriotism • Nuclear anxiety • Military spending • Space Race • Propaganda
	HS.US.CC.9	Analyze examples of US intervention, conflict, and compromise between the United States and other nations, groups, and individuals in the post-Cold War Era.	• Kuwait and Iraq • Somalia • Haiti • Bosnia and Kosovo • Iraq • Afghanistan • UN Missions
Cause and Effect (US.CE)	**HS.US.CE.10**	Evaluate the actions and methods groups facing discrimination used to achieve expansion of rights and liberties from 1865-present.	• Mutual aid societies • Identity-based social organizations • Political organizations • Economic decisions • Civil disobedience and protest • State and federal legislation • Supreme Court challenges
	HS.US.CE.11	Using primary source images, data, and documents, describe the causes of immigration to the United States and identify the domestic social and political responses to migration and immigration in the United States from the 19th century to the present.	• Nativism • Anti-Irish discrimination • Chinese Exclusion Act • "Gentleman's Agreement" • 1921 and 1924 quota systems • Bracero program • 1965 Immigration Act • 1980 US Refugee Act • 2018 Executive Order 13780

Concept	Code	Standard	Examples include, but not limited to:
Communities and Pluralism (H.CP)	**HS.US.CP.12**	Examine how underrepresented groups, including those identifying by race, ethnicity, gender, sexual orientation, and religion viewed themselves and contributed to the identity of the United States in the world from 1865-present.	• American Indian/Alaska Native/Native Hawaiian • Americans of African, Asian, Pacific Island, Chicano, Latino, Middle Eastern or Jewish descent • Immigrants or refugees • Various religious identities • Lesbian, gay, bisexual, and transgender identities
	HS.US.CP.13	Using the Tribal History/Shared History resources and other primary and secondary documents, analyze and explain the histories of the American Indian/Alaska Natives and the history of Native Hawaiians in Oregon to examine the effect of state and federal actions and policies on tribal populations, rights, and culture.	• 1871 Indian Appropriations Act • Boarding school era • Dawes Act (1887) • Indian Reorganization Act • Treaties and federal policies • Sovereignty and Gov-Gov relations • Tribal termination and relocation • Tribal restoration • American Indian Movement • Land Back Movement • Indian water rights
	HS.US.CP.14	Examine the perspectives of survivors of Indigenous genocide, Black communities destroyed by violence, and other human rights violations utilizing primary sources from multiple perspectives including written and recorded survivor testimonies.	• Oregon's Trail of Tears • Tulsa massacre • Japanese incarceration • Stonewall uprising • War refugees • Holocaust and other genocides
	HS.US.CP.15	Analyze the long-term consequences of the Jim Crow era (1870s–1960s).	• Legal and social failures to guarantee racial equality • Promulgation of white supremacism • State and vigilante violence targeted at individuals and communities • The role of racist groups like the Ku Klux Klan • Black leaders and organizations working for Civil Rights and equality

Concept	Code	Standard	Examples include, but not limited to:
	HS.US.CP.16	Assess the role and consequences of antisemitism in the United States.	• Religious foundations of antisemitism • Historical and contemporary stereotypes • Exclusion of Jews and white supremacy • Response to persecution in Nazi Germany • Immigration restrictions • Media and propaganda portrayals of victims
	HS.US.CP.17	Analyze the role of religion in shaping social, cultural, and political developments in the United States during the 20th century.	• Social movements • Cultural values • Political ideologies • Public policies
	HS.US.CP.18	Analyze the origins, evolution, and goals of the movement for Black equality from 1865 to the present, including examples of the social and political resistance to integration and equality.	• Civil & political initiatives during Reconstruction 1865-1877 • Participation in segregated military • Black activists and leaders 1865-1968 • Black Organizations 1900-Present • Responses to violence
	HS.US.CP.19	Identify and analyze political, social, and intellectual movements in the post-WWII United States that challenged discrimination and changed traditional assumptions about race, ethnicity, class, gender, the environment, and religion.	• Women's rights • Lesbian, Gay, Bisexual, Transgender, and Queer (LGBTQ) Civil Rights Movement • Chicano Movement • Combatting antisemitism • Disability rights movement • Environment movement • Health and rights of workers • Native American rights, self-determination, sovereignty

Concept	Code	Standard	Examples include, but not limited to:
Continuity and Change (WR.CH)	**HS.WR.CH.1**	Use primary and secondary resources to analyze the development of political identity associated with the nation-state and nationalism.	• French Revolution • Haiti • Gran Columbia • German Unification • Zionism • Arab Nationalism • Indian Nationalism • Ghana/Gold Coast • Kenya
	HS.WR.CH.2	Analyze the political, social, and economic causes and effects of industrialization in Europe and North America between 1850 and the present	• Migration • Industrial pollution • Labor unions • Class stratification • Cosmopolitan cities • Expansion of citizen rights • Total War • Multinational Corporations
Conflict and Cooperation (US.CC)	**HS.WR.CC.3**	Examine various means national and cultural groups used in attempts to combat the power of European Imperialism between 1750-1945.	• Peru • Haiti • China • India • Hawaii • UNIA
	HS.WR.CC.4	Analyze and assess how superpower rivalries created new political alliances, led to proxy wars, and resulted in the rise of international organizations from 1945-1991.	• Cuba • China • Korea • Vietnam • Congo • NATO • Warsaw Pact

Concept	Code	Standard	Examples include, but not limited to:
	HS.WR.CC.5	Assess the effectiveness of organizations and institutions designed to foster collaboration, compromise, and development from 1945-present.	• United Nations • NAT0 • European Union • World Bank • World Trade Organization • Group of Twenty • African Union • MERCOSUR • APEC (Asia Pacific Economic Cooperation) • USMCA
	HS.WR.CC.6	Analyze methods used by state and non-state actors in efforts to decolonize, including protests, social media campaigns, non-violent actions, boycotts, terrorism, guerilla warfare, and other methods from 1945 to the present.	• India • Vietnam • Algeria • Kenya • Ghana • Angola • Poland • East Germany (GDR)
Cause and Effect (US.CE)	**HS.WR.CE.7**	Determine the causes of World War I. Analyze causes and effects of political revolutions in multiple global regions from 1789 to the present.	• France 1789 • Haiti 1791 • Latin American Wars of Independence 1808 • European revolutions of 1848 • Russia 1917 • Mexico 1917 • Vietnam 1945 • China 1949 • Cuba 1953 *Note-Years denote beginning of revolution*

Concept	Code	Standard	Examples include, but not limited to:
	HS.WR.CE.8	Determine the causes of World War I.	• Militarism • Alliances • Industrialization • Nationalism
	HS.WR.CE.9	Analyze the political, social, economic, and cultural developments following World War I.	• Communist and Socialist Political Parties • Role of Women • Rights of Colonial subjects • Technology • Traditional Religion • Race Relations
Communities and Pluralism (H.CP)	**HS.WR.CP.10**	Identify the characteristics of fascism, militarism, and totalitarianism as exhibited in the rise of the authoritarian regimes in Italy, Japan, Germany, and the Soviet Union during the 1920s and 1930s	• Authoritarian Leadership • Militarism • Nationalism • Autarky • Totalitarian control • Corporate state • Expansionism and colonialism • Racist ideology • Propaganda • Surveillance • Terror
	HS.WR.CP. 11	Determine the causes of World War II.	• Nationalism • Weakness of League of Nations • Economic depression • Territorial ambition • Appeasement

Concept	Code	Standard	Examples include, but not limited to:
	HS.WR.CP.12	Identify the causes and effects of Japanese, Soviet, and German colonial military occupation on civilians from 1910-1945.	• Expansionism and colonialism • Ideological and racist motivations • Military strategy • War and genocide • Resistance and collaboration • Refugees and forced migration • Resilience and Long-term trauma
	HS.WR.CP.13	Analyze the political, social, economic, and cultural developments following World War II.	• Cold War • Decolonization • Ideological competition in Africa, Asia, and Americas • UN and international organizations • Civil Rights Movement • EEC and EU • Technological Advancements • Cultural exchange
	HS.WR.CP.14	Identify and explain the significance of the origins of antisemitism.	• Anti-Judaism within Catholic and Protestant teachings. • Expulsion of Jews from various European countries • State-sponsored or sanctioned violence including pogroms • Laws limiting Jewish rights before the Nazi party • Eugenics and “Social Darwinism”
	HS.WR.CP.15	Explain the significant events, public policies, and experiences of the Holocaust.	• Jewish life in Germany before and after the rise of the Nazi party • The Nuremberg Laws and related laws limiting and eliminating Jewish and other identity groups' rights (1933-1945) • Kristallnacht, rising violence against Jews and other identity groups • Invasion of Poland, creation of ghettos and concentration camps • Wannsee Conference and adoption of the Final Solution • Stories of the victims of the Holocaust

Concept	Code	Standard	Examples include, but not limited to:
	HS.WR.CP.16	Analyze primary documents to examine the role individual bystanders, collaborators, and perpetrators played in the implementation of Nazi policies against Jewish people and other targeted groups, as well as the role of resisters in opposing the Nazis and their policies within German-occupied territory.	• Diaries and letters • Photographs and film • Government Documents • Witness testimony • Trial documents • Newspaper and magazine accounts
	HS.WR.CP.17	Evaluate the international community's responses to the persecution of Jews and other identity groups during the Holocaust.	• International response or non-response to Nazi racial laws • Evian & Bermuda conferences, antisemitic and anti-immigration policies • Appeasement, collaboration with German actions and policies • Public statements addressing violations and violence against Jews and other identity groups.
	HS.WR.CP.18	Analyze the conditions and responses to genocides of the 20th century.	• Herero & Nama • Armenian • Holodomor • Cambodia • Rwanda • Guatemala • Myanmar
	HS.WR.CP.19	Analyze efforts among nation-states and in the international community's efforts to hold perpetrators responsible for their involvement in the Holocaust and other acts of genocide.	• The Nuremberg and Tokyo trials • UN -Prevention and Punishment of the Crime of Genocide • UN Declaration of Human Rights • International Criminal Tribunal for Former Yugoslavia • Argentina- Commission on Disappearance of Persons • Ecuador -The Truth Commission • Bangladesh-War Crimes Fact Finding Committee • Rwanda-National Unity and Reconciliation Commission • South Africa-Truth and Reconciliation Commission *Note*-Additional *examples included in* 6/7.C.DP.1

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Oregon's High School Higher Education and Career Path Skills Content Standards (HS.HECPS)

May 2024 Draft for the State Board of Education

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- Standard: HS.HECPS.D.1
- Standard: HS.HECPS.D.2
- Standard: HS.HECPS.D.3
- Standard: HS.HECPS.D.4

Introduction

Oregon's High School Higher Education and Career Path Skills Domains, Standards and Key Concepts

Oregon's High School Higher Education and Career Path Skills standards include four domains: 1) Seeking Assistance and Self-Advocacy, 2) Career Exploration and Preparation, 3) Postsecondary Readiness, and 4) Workforce Readiness. Each of these domains includes three to four standards which encompass the knowledge and skills that students should know and be able to do to be prepared for postsecondary opportunities based on their own goals and aspirations for their future.

The standards also include Key Concepts that are relevant to each domain and standard. These are found in the Appendix.

Domains

- HS.HECPS.A: Seeking Assistance and Self-Advocacy
- HS.HECPS.B: Career Exploration and Preparation
- HS.HECPS.C: Postsecondary Readiness
- HS.HECPS.D: Workforce Readiness

High School Higher Education and Career Path Skills Standards

HS.HECPS.A: Seeking Assistance and Self-Advocacy

HS.HECPS.A.1 Explore how personal strengths, aptitudes, interests and values connect with future career paths.

HS.HECPS.A.2 Identify school and community resources for mental, physical and financial well-being, including an understanding of how to seek assistance.

HS.HECPS.A.3 Understand the rights and responsibilities that come with being a student and member of communities and organizations.

HS.HECPS.A.4 Practice self-advocacy by communicating needs clearly in writing and speaking, expressing concerns, and seeking out support when necessary.

HS.HECPS.B: Career Exploration and Preparation

HS.HECPS.B.1 Practice employability skills necessary to effectively self-manage and collaborate with others in a workplace setting.

HS.HECPS.B.2 Understand the diverse range of career pathways available, including, but not limited to, apprenticeships, military service, higher education, trades and non-degree programs.

HS.HECPS.B.3 Explore local opportunities and benefits for participating in career-connected and community-based experiential learning related to future goals.

HS.HECPS.C: Postsecondary Readiness

HS.HECPS.C.1 Explore postsecondary educational and career pathways, and identify necessary training, education, skills, and prerequisites aligned with aspirations.

HS.HECPS.C.2 Research admission processes for postsecondary pathways and practice applying to apprenticeships, military service, higher education, trades, and non-degree programs.

HS.HECPS.C.3 Investigate strategies for making well-informed financial decisions about postsecondary pathways, including how to navigate financial aid options (i.e., FAFSA, ORSAA), application processes, and a variety of credible funding sources and scholarships.

HS.HECPS.D: Workforce Readiness

HS.HECPS.D.1 Prepare to apply for an entry-level job related to future career goals.

HS.HECPS.D.2 Prepare a resume and cover letter and determine what to include in a professional portfolio.

HS.HECPS.D.3 Demonstrate interview skills in virtual and in-person settings.

HS.HECPS.D.4 Navigate and negotiate offers of employment including human resource paperwork.

Appendix A: Seeking Assistance and Self-Advocacy (HS.HECPS.A) Key Concepts

Standard: HS.HECPS.A.1

Standards Statement

Explore how personal strengths, aptitudes, interests and values connect with future career paths.

Key Concepts

- Students can identify their personal strengths, aptitudes, interests and values, which could include, but are not limited to:
    - Exploring personal strengths
    - Assessing aptitudes and interests
    - Evaluating one's values and beliefs
- Students can identify connections between their personal strengths, aptitudes, interests, values and future career paths, which could include, but are not limited to:
    - Researching careers that align to individual interests, strengths, and aptitudes
    - Exploring a range of jobs, industries, and roles
    - Identifying internships, networking, and volunteering opportunities
    - Considering financial goals (e.g., own or rent, type of car, etc.)
    - Realizing that strengths, aptitudes, interests, and future career paths can change over time

Standard: HS.HECPS.A.2

Standards Statement

Identify school and community resources for mental, physical and financial well-being, including an understanding of how to seek assistance.

Key Concepts

- Students can identify school and local community resources for mental, physical and financial well-being, which could include, but are not limited to:
    - Identify local community resources for mental, physical and financial well-being
    - Evaluate community resources for safety, pertinence and cultural relevance.
    - Identify a network of trusted adults (inside and outside the school) that could include, but is not limited to specialized school personnel, family/caregivers, friends and community members.
- Students can practice how to ask for assistance, which could include, but are not limited to:
    - Recognize the importance of seeking assistance
    - Identify when help or support is needed
    - Communicate needs clearly in written and verbal formats

- Practice asking for help in personal and professional contexts (e.g., mental health support, drug and addiction counseling, LGBTQ2SIA+ resources)
- Practice assertiveness and persistence when seeking support, accommodations and resources
- Advocate for the well-being of others, acting as a mentor or ally

Standard: HS.HECPS.A.3

Standards Statement

Understand the rights and responsibilities that come with being a student and member of communities and organizations.

Key Concepts

- Students can identify their rights and responsibilities as a student and member of communities and organizations through research and reflection, which could include, but is not limited to:
  - Online resources
  - Library research
  - Workshops and seminars
  - Simulated scenarios
  - Peer discussions
  - Role-playing exercises
  - Internships and job shadowing
  - Labor laws
  - Legal clinics or workshops
  - Research projects
  - Peer advocacy groups

Standard: HS.HECPS.A.4

Standards Statement

Practice self-advocacy by communicating needs clearly in writing and speaking, expressing concerns, and seeking out support when necessary.

Key Concepts

- Students can practice self-advocacy through clear communication, in both writing and speaking, which could include, but is not limited to:
  - Identifying individual or collective needs
  - Developing clear and concise communication skills
  - Practicing various modes, methods, or styles of communicating needs
  - Participating in role-playing scenarios
  - Seeking feedback

    - Goal setting
- Students can practice self-advocacy through expressing concerns, which could include, but is not limited to:
    - Identifying specific concerns
    - Choosing the time and place
    - Identifying power dynamics that are/may be present
    - Using of "I" statements
    - Practicing active listening
    - Proposing solutions
    - Seeking support
    - Monitoring, reflecting and learning from a situation
- Students can practice self-advocacy through seeking out support when necessary, which could include, but is not limited to:
    - Recognize the need for support
    - Identify trusted adults
    - Articulate needs clearly
    - Utilize school resources
    - Reach out proactively
    - Explore peer support networks
    - Advocate for accommodations
    - Seek outside resources
    - Follow through

Appendix B: Career Exploration and Preparation (HS.HECPS.B) Key Concepts

Standard: HS.HECPS.B.1

Standards Statement

Practice employability skills necessary to effectively self-manage and collaborate with others in a workplace setting.

Key Concepts

- Students can practice employability skills, which could include, but are not limited to:
    - Adaptability/Flexibility: Open to change and ability to adjust
        - Adhering to workplace practices*
        - Demonstrating creativity and innovative thinking*
    - Analysis/Solution Mindset: Problem Solver
        - Employing critical thinking to solve problems*
    - Collaboration: Team Player
        - Demonstrating teamwork and conflict resolution*
    - Communication: Good Communicator
        - Communicating clearly and effectively*
    - Digital Literacy: Good with Technology
        - Demonstrating fluency in workplace technologies*
    - Empathy: Sensitive to Others' Feelings
        - Practicing cultural competence*
    - Entrepreneurial Mindset: Go-Getter
        - Planning, organizing and managing work*
        - Demonstrating creativity and innovative thinking*
    - Resilience: Plans for Success & Handles Failure
        - Exhibiting personal responsibility and accountability*
    - Self-Awareness: Self-Understanding
        - Making informed career decisions*
        - Exhibiting personal responsibility and accountability*
    - Social Diversity/Awareness: Sensitivity to Differences
        - Practicing cultural competence*

(*) Denotes Career and Technical Education (CTE) Employability Knowledge and Skill Statements

Standard: HS.HECPS.B.2

Standards Statement

Understand the diverse range of career pathways available, including, but not limited to, apprenticeships, military service, higher education, trades and non-degree programs.

Key Concepts

- Students can understand the diverse range of career pathways, which could include, but not limited to:
    - Apprenticeships
    - Military service
    - Higher education
    - Certificate and licensure programs
    - Trades
    - On-the-job training or advancement opportunities

Standard: HS.HECPS.B.3

Standards Statement

Explore local opportunities and benefits for participating in career-connected and community-based experiential learning related to future goals.

Key Concepts

- Students can identify local partners and opportunities for career connected learning, which could include, but not limited to:
    - Informational interviews
    - Internships
    - Job shadowing
    - Industry-specific projects
    - Career fairs and networking events
    - Mentorship programs
    - Industry certifications and badging programs
    - Entrepreneurship programs
- Students can identify local opportunities for community-based experiential learning, which could include, but not limited to:
    - Service learning organizations
    - Community service projects
    - Field studies
    - Collaborative research projects
    - Community-based participatory research
    - Civic engagement activities

- Internships with local businesses
- Community-based art or performance projects
- Language and cultural immersion programs
- Workshops and training sessions

Appendix C: Postsecondary Readiness (HS.HECPS.C) Key Concepts

Standard: HS.HECPS.C.1

Standards Statement

Explore postsecondary educational and career pathways, and identify necessary training, education, skills, and prerequisites aligned with aspirations.

Key Concepts

- Students can explore components of postsecondary educational and career pathways, which could include, but not limited to:
    - Prerequisites, course sequences, and skills for:
        - 2 year
        - 4 year
        - Technical college
        - Trade school
        - Apprenticeships
        - Entrepreneurship
        - Military service
    - Annual transcript review/corrections and who to contact if questions or errors exist
    - Volunteer or community service as a prerequisite for scholarships
    - Career counseling or school counseling sessions
    - Workshops or seminars on college admissions, financial aid, and career planning
    - Industry-specific events such as job fairs or panels featuring professionals from various fields
    - College campus visits or virtual tours
    - Job shadowing experiences or informational interviews with professionals
    - Explore a variety of career cluster areas
    - Research projects or presentations on different career paths and educational options
    - Skill-building activities such as coding workshops, public speaking courses, or entrepreneurship competitions
    - Online resources such as career assessment tools, industry-specific forums, or webinars
    - Experiential learning opportunities like field trips to workplaces or service-learning projects
- Students should be able to identify training, education, and competencies that align to their aspirations, which could include, but not limited to:
    - Online courses or distance learning programs
    - Mentorship programs or shadowing experiences
    - Participation in industry-specific clubs or organizations
    - Volunteer work or community service projects

- Job shadowing or informational interviews with professionals in their field of interest
- Dual enrollment programs with local colleges or universities
- Portfolio development or project-based learning experiences
- Networking events or conferences related to their field of interest
- Self-directed learning through books, podcasts, or online resources
- Opportunities to participate in school or community athletics and clubs

Standard: HS.HECPS.C.2

Standards Statement

Research admission processes for postsecondary pathways and practice applying to apprenticeships, military service, higher education, trades, and non-degree programs.

Key Concepts

- Students can research and navigate the admission process to postsecondary institutions and practice applying, which could include, but not limited to:
  - Understand the admission timeline and application process for postsecondary pathway of choice
  - Learn which programs to apply for and how to problem solve when barriers arise
  - Navigate career information systems (e.g., Oregon CIS, Naviance or others)
  - Research and understand the application requirements for different postsecondary institutions
  - Attend postsecondary fairs, activities, or information sessions to learn about various programs, acceptance and admission criteria
  - Seek guidance from school counselors or college advisors to identify suitable programs aligned with their interests and career goals
  - Utilize online resources such as college websites or admission portals to explore program options and application deadlines
  - Research standardized tests like the SAT, ACT, or ASVAB, understand their role in the admission process, and determine if a test is needed for admission
  - Request letters of recommendation from teachers or mentors who can attest to their academic abilities and personal qualities
  - Develop strong application materials, including essays, resumes, and portfolios, to showcase their achievements and aspirations
  - Explore the various pathways to postsecondary education, such as community college, transfer programs or apprenticeships, based on individual preferences and career objectives
  - Practice applying to postsecondary institutions of choice, using a Common Application or other application form
- Students can gain familiarity with the application and admission processes for non-degree programs, which could include, but not limited to:
  - Understand the terminology used in the application process

- Adhere to timelines, and compiling necessary documentation
- Identify suitable programs, troubleshoot potential barriers
- Seek assistance from appropriate sources for support and guidance
- Network with professionals or alumni in their desired field to gain insights into program offerings, career pathways, and industry trends
- Participate in mock interviews or resume-building workshops
- Explore alternative pathways to non-four-year degree programs

Standard: HS.HECPS.C.3

Standards Statement

Investigate strategies for making well-informed financial decisions about postsecondary pathways, including how to navigate financial aid options (e.g., FAFSA, ORSAA), application processes, and a variety of credible funding sources and scholarships.

Key Concepts

- Students can make informed financial decisions related to postsecondary education, which could include, but not limited to:
  - Understand how to navigate the application process for financial aid (including FAFSA and ORSAA)
  - How to locate and apply for scholarships and grants
  - Know financial aid and scholarships terminology, timelines, sources, and types
  - Understand eligibility requirements (e.g., financial, community engagement, academic performance, extra curriculars)
  - Know what is employee sponsored education/training
  - Know how to apply for internships
  - Learn about reputable vs scam scholarships and how to spot them
  - Know who to go to for help both within the school and outside
- Students can identify credible scholarships, which could include, but not limited to:
  - Researching scholarships offered by colleges and universities
  - Exploring scholarships offered by professional associations or organizations related to their field of interest
  - Checking scholarship databases and search engines (e.g., Fastweb, Scholarships.com, College Board's Scholarship Search)
  - Inquiring about scholarship opportunities through community organizations, religious institutions, or employers
  - Investigating scholarships offered by foundations or charitable organizations in their local area
  - Consulting with school counselors or college advisors for recommendations on reputable scholarship opportunities
  - Checking with state or federal government agencies for scholarship programs available to eligible students

- Exploring scholarship opportunities specific to their demographic background (e.g., ethnicity, gender, military affiliation, etc.)
- Researching scholarships offered by non-profit organizations or foundations dedicated to supporting education initiatives
- Networking with peers, alumni, or mentors who may be aware of scholarship opportunities or have received scholarships themselves

Appendix D: Workforce Readiness(HS.HECPS.D) Key Concepts

Standard: HS.HECPS.D.1

Standards Statement

Prepare to apply for an entry-level job related to future career goals.

Key Concepts

- Students can prepare to apply for an entry-level job in relation to future academic and career goals, which could include, but not limited to:
    - Identifying career goals
    - Identifying credible sources for finding open positions
    - Navigating technology and job search platforms to find relevant opportunities
    - Examining cultural differences in communication and workplace behaviors
    - Comparing and contrasting different workplace communication expectations
    - Developing professional communication skills and email, phone, and text etiquette
    - Understanding how to read a job description and identify and respond to relevant application vocabulary and language
    - Building a list of references and understanding the difference between personal and professional references
    - Learning to navigate an online application portal and complete a job application online and on paper

Standard: HS.HECPS.D.2

Standards Statement

Prepare a resume and cover letter and determine what to include in a professional portfolio.

Key Concepts

- Students can prepare a resume and cover letter, which could include, but not limited to:
    - Distinguishing between various types of resumes
    - Determining relevant experiences to include on a resume
    - Tailoring resumes and cover letters to specific job descriptions
    - Quantifying achievements and utilizing action verbs
    - Identifying relevant personal strengths, skills, and experiences
    - Seeking feedback
    - Proofreading and editing
- Students can determine what to include in a professional employment portfolio, which could include, but not limited to:

- Identifying when to use a cover letter
- Translating personal skills to match a job description
- Understanding when to use a photograph of yourself
- Determining the potential impact of your digital footprint
- Selecting high-quality work samples
- Including certifications and awards
- Showcasing multimedia content (e.g., image, video, etc.)
- Preparing digital employment portfolios (e.g., LinkedIn)
- Demonstrating growth and development
- Researching the potential employer and addressing their needs and values
- Organizing and presenting materials professionally
- Seeking feedback

Standard: HS.HECPS.D.3

Standards Statement

Practice interview skills in virtual and in-person settings.

Key Concepts

- Students can practice interview skills for both virtual and in person interviews, which could include, but not limited to:
  - Recognizing the impact of non-verbal communication and cultural differences
  - Developing appropriate answers to a variety of interview questions
  - Practicing approaches for different types of interview situations (e.g., single interviewer, multiple interviewers, self-guided, round-robin, group, remote, etc.)
  - Engaging in simulation activities that prepare students for real-world experiences
  - Practicing active listening and engagement
  - Dressing appropriately for an interview depending on the specific role
  - Asking appropriate questions at the end of the interview
- Students can develop post-interview skills for variety of types of interviews, which could include, but not limited to:
  - Asking for next steps and contact Information
  - Reflecting on interview performance
  - Writing down important details covered in the interview
  - Sending a thank you email or note
  - Asking for feedback
  - Staying positive and avoiding overthinking
  - Keeping the job search active

Standard: HS.HECPS.D.4

Standards Statement

Understand the hiring process and human resource procedures by analyzing common employment situations.

Key Concepts

- Students can compare terms of employment and determine if it is a favorable offer, which could include, but not limited to:
    - Preparing to complete job acceptance
    - Filling out a W-4
    - Identifying appropriate forms of identification for the I-9
    - Identifying parts of an employee handbook and important employment policies
    - Practicing negotiating terms of employment and recognize when negotiation is appropriate
    - Employment benefits
- Students can understand common human resource procedures and recognize common employment situations, which could include, but not limited to:
    - Requesting time off
    - Ethical use of paid time off
    - Difference between union and non-union employment
    - How to address conflict with colleagues and an employer
    - Recognizing and reporting sexual harassment and workplace bullying
    - Navigating bias and discrimination
    - Knowing your rights as an employee

Oregon State Board of Education
June 13, 2024

AGENDA ITEM: Oregon's Standards for *Higher Education and Career Path Skills* and *Personal Financial Education*

SUBJECT: Oregon's Standards for *Higher Education and Career Path Skills* and *Personal Financial Education* **STAFF NAME & OFFICE**: ● Alexa Pearson, Office of Teaching, Learning and Assessment ● Aujalee Moore, Office of Teaching, Learning and Assessment ● Beth Wigham, Office of Teaching, Learning and Assessment 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 bill requires ODE to develop standards for both content areas.	☐ **First Reading** ☐ **Presentation** ☐ **No Presentation** **x Action** ☐ **Temp Rule** ☐ **Presentation** **x No Presentation**

BACKGROUND

In 2023, Senate Bill 3 was passed by the Oregon legislature and signed by Governor Kotek after receiving broad support from educators, parents, students, and business and community partners. 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 after they leave high school.

ODE facilitated the development of standards for both content areas by convening two separate panels made up of educators, business and industry partners, and experts from higher education and other education organizations. The panels were led by ODE content specialists who have standards development expertise as well as familiarity with the relevant content area. Each panel met synchronously six times from December through March to develop and refine standards for either Personal Financial Education (PFE) or Higher Education and Career Path Skills (HECPS). The meetings were facilitated by ODE staff from the Office of Teaching, Learning, and Assessment and the Office of Education, Innovation and Improvement, as well as a staff member from the Higher Education Coordinating Commission. In addition to synchronous sessions, panelists had the opportunity between meetings to asynchronously conduct reviews and provide edits and feedback on the draft standards.

ODE gathered feedback on the draft standards in April using two statewide surveys for each content area. The survey included Likert-type scale and qualitative questions on whether the standards make a positive difference, are understandable, if additional guidance is needed, what was liked about the standards, as well as specific feedback on the draft standards for modification, additions or removal.

There were 176 respondents for the Personal Financial Education survey and 179 for the Higher Education and Career Path Skills survey, with a combined total of 355 respondents. Respondents included school district and education service district personnel, charter school staff, as well as content

experts, higher education personnel, business and industry partners and parents from across the state. An ODE research analyst identified themes, significant quotes, and suggested edits, as well as suggestions for what would support implementation of the standards.

Higher Education and Career Path Skills survey results elevated that:

- 91% of respondents agree or strongly agree that the draft standards address the requirements of the legislation.
- 90% of respondents agree or strongly agree that the draft standards will make a positive difference for students.
- 93% of respondents agree or strongly agree that the draft standards are easy to understand
- 88% of respondents agree or strongly agree that the draft standards cover what they would expect students to know.

Personal Financial Education survey results elevated that:

- 96% of respondents agree or strongly agree that the draft standards address the requirements of the legislation.
- 93% of respondents agree or strongly agree that the draft standards will make a positive difference for students.
- 98% of respondents agree or strongly agree that the draft standards are easy to understand
- 87% of respondents agree or strongly agree that the draft standards cover what they would expect students to know.

In addition to survey data, ODE contracted with Oregon Kitchen Table (OKT) to facilitate interviews and engagement sessions with students, families and communities during the month of April to collect feedback related to the draft standards and their implementation. Those who contributed feedback included the following:

- LGBTQSIA2+ youth
- Immigrant and refugee communities
- Youth whose parents are or were incarcerated
- Youth who are involved in systems (residential treatment, juvenile justice, long term care)
- English learners
- Staff and students age 12-25 who access drop-in centers
- Black, Latinx, and Filipino identifying youth and adults
- Students who experience disabilities
- Students experiencing houselessness

OKT asked a number of open-ended qualitative questions. Analysis of the feedback received was submitted in a draft report (final report will be shared in June), which elevated themes, quotes, suggested edits and implementation needs and concerns. The draft report highlighted the following general feedback:

- There is broad agreement that Oregon students need more preparation to navigate a world full of large, often-intimidating systems and complex decision-making.
- Schools can provide information that families might not otherwise teach at home.
- Standards for both content areas should be flexible and allow for culturally responsive instruction.

- It is important for teachers to understand how people from a wide variety of cultures relate to financial decision-making and future planning.
- Including more perspectives and people in this class, opposed to just a single teacher, would support student learning.

Personal Financial Education highlighted the following feedback:

- Students must understand credit and debt, and how debt operates in a societal context, because of how it can impact students' long-term financial health.
- Communities are interested in specific cultural practices related to saving, banking, and investing.
- In addition to benefiting multiple generations, learning opportunities like these can create tension or conflict among generations with differing attitudes about issues like credit, banking or higher education.

Higher Education & Career Path Skills highlighted the following feedback:

- It would be helpful to cover all of the domains within the standards so all students have groundwork they could build from later.
- There is a need for more support around financial aid, college application process, and understanding and choosing among different post-secondary options such as community college, 2-year vs. 4-year degrees, etc., particularly in relation to money and decisions about debt.
- There is a need for students to understand and gain "soft skills" and expectations around workplace or classroom conduct, such as timeliness, collaboration, and responsiveness.
- The environments students are in, particularly for incarcerated youth, may impact the way they interact with the content.

ODE staff engaged in cross-office collaboration to consider and incorporate the feedback throughout the revision and refinement process of the draft standards. Most of the feedback received from the two surveys and OKT community conversations were related to suggestions for strengthening standards guidance and implementation rather than on the standards themselves. ODE made several minor revisions to the draft standards created by the panel based on internal feedback. The draft standards presented to the Board are inclusive of all changes made in response to feedback from education partners, community members, and internal cross-office partners.

SUMMARY OF PREVIOUS BOARD ACTION

This item has not been previously before the Board.

HAS THE RULE CHANGED SINCE LAST BOARD MEETING?

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

POLICY ISSUE OR CONCERNS

Oregon State Board of Education
June 13, 2024

AGENDA ITEM: Oregon's Standards for *Higher Education and Career Path Skills* and *Personal Financial Education*

Stakeholders/Partners:
Members of both the Personal Financial Education and Higher Education Career Pathway Skills standards panels had many conversations regarding the bill language and the development of a set of standards that can be applied to real-life contexts and situations, and are accessible across various underserved and underrepresented groups. Building from the concepts outlined in SB3, these draft standards establish a foundation of knowledge and skills that will help to ensure students receive comprehensive information on personal finance and post-secondary planning that can positively impact their lives.

Positive Effects:
These draft standards are designed to support districts with implementation of the new credit requirements and have the potential to 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. The draft standards can support students in navigating these complex systems and processes with improved clarity and confidence.

Negative Effects/Barriers:
One key consideration is that Personal Financial Education standards have been embedded within the adopted Social Science standards for K-12 which are currently being revised for K-8 and taken out of High School due to SB 3, and up for adoption with the SBE. 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.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 with adopted content standards for each area provides a consistent expectation for all Oregon high school students.

Mitigation:
Some of the ways ODE is planning to support the implementation of these new requirements are to:

- 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

Oregon State Board of Education
June 13, 2024

AGENDA ITEM: Oregon's Standards for *Higher Education and Career Path Skills* and *Personal Financial Education*

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. 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 will not be fiscally impacted by the adoption of standards. However, school districts may be fiscally impacted by the new requirements set by Senate Bill 3 as they may need to:

- secure additional staffing to meet the new requirements,
- procure materials to teach the course, and
- 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

A "YES" vote will result in the adoption of standards for *Higher Education and Career Path Skills* and *Personal Financial Education* to support the implementation of updates to ORS 329.45 outlined in Senate Bill 3.
A "NO" vote will reject the adoption of standards for Higher Education and Career Path Skills and Personal Financial Education to support the implementation of updates to ORS 329.45 outlined in Senate Bill 3.

STAFF RECOMMENDATION

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

ATTACHMENTS

Oregon State Board of Education
June 13, 2024

AGENDA ITEM: Oregon's Standards for *Higher Education and Career Path Skills* and *Personal Financial Education*

- Attachment 1: Oregon's High School Standards for Higher Education and Career Path Skills
- Attachment 2: Oregon's High School Standards for Personal Financial Education



Oregon's High School Personal Financial Education Content Standards (HS.PFE)

May 2024 Draft for the State Board of Education

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Introduction

Oregon's High School Personal Financial Education Domains, Standards and Key Concepts

Oregon's High School Personal Financial Education standards include five domains: 1) Credit and Debt, 2) Banking, Investing, Saving and Repayment, 3) Budgeting, Spending and Money Management, 4) Personal Income, Taxes and Services, and 5) Maintaining Financial Well-being. Each of these domains includes three to four standards which encompass the knowledge and skills that students should know and be able to do to be financially literate when they leave high school.

The standards also include Key Concepts that are relevant to each domain and standard. These are found in the Appendix.

Domains

- HS.PFE.A: Credit and Debt
- HS. PFE.B: Banking, Investing, Saving and Repayment
- HS.PFE.C: Budgeting, Spending and Money Management
- HS.PFE.D: Personal Income, Taxes and Services
- HS.PFE.E: Maintaining Financial Well-being

High School Personal Financial Education Standards

HS.PFE.A: Credit and Debt

HS.PFE.A.1 Understand components used to build credit and investigate actions that could impact personal credit scores.

HS.PFE.A.2 Compare and contrast various types of consumer credit and the costs and benefits of borrowing money.

HS.PFE.A.3 Analyze the long-term impacts of high and low credit scores.

HS.PFE.B: Banking, Investing, Saving and Repayment

HS.PFE.B.1 Describe the roles of various types of financial institutions, and explore products and services provided by these institutions.

HS.PFE.B.2 Develop goals for building assets using various investment options, and identify potential risks and rewards for a given strategy.

HS.PFE.B.3 Evaluate repayment strategies, risks and costs for various types of consumer credit use, including simple or compound interest calculations.

HS.PFE.C: Budgeting, Spending and Money Management

HS.PFE.C.1 Describe budgeting strategies for savings goals, emergency funds, fixed expenses and variable expenses.

HS.PFE.C.2 Identify and examine the costs and benefits of financial decisions.

HS.PFE.C.3 Apply a budgeting strategy to create a sample budget that includes common costs associated with housing, transportation, and insurance products and analyze the outcomes.

HS.PFE.D: Personal Income, Taxes and Services

HS.PFE.D.1 Define and identify examples of common types of income.

HS.PFE.D.2 Understand the personal income tax filing cycle, including common tax forms and available tax preparation resources and options.

HS.PFE.D.3 Understand taxes associated with various sources of income and common tax credits that could reduce individual tax liability.

HS.PFE.D.4 Understand common types of federal, state, regional, and local taxes and associated tax-funded services provided.

HS.PFE.E: Maintaining Financial Well-being

HS.PFE.E.1 Analyze the psychology of money through cultural, social, and emotional influences on financial behavior.

HS.PFE.E.2 Analyze and apply multiple sources of information when making consumer decisions.

HS.PFE.E.3 Understand and apply strategies to prevent fraud and personal identity theft.

Appendix A: Credit & Debt (HS.PFE.A) Key Concepts

Standard: HS.PFE.A.1

Standards Statement

Understand components used to build credit and investigate actions that could impact personal credit scores.

Key Concepts

- Students can understand components used to build credit, which could include, but are not limited to:
    - Credit scores
    - Credit reports
    - Opening a credit account
    - Credit rebuilding

- Students can investigate actions that impact building credit, which could include, but are not limited to:
    - Payment history
    - Credit utilization
    - Length of credit history
    - Types of credit
    - New credit inquiries

Standard: HS.PFE.A.2

Standards Statement

Compare and contrast various types of consumer credit and the costs and benefits of borrowing money.

Key Concepts

- Students can name various types of consumer credit including, but not limited to:
    - Installment Credit
    - Revolving Credit
    - Open-end Credit
    - Secured Loans
    - Unsecured Loans

- Students can compare and contrast the costs and benefits for a given type of consumer credit including, but not limited to:
    - Payments
    - Budgeting

- Interest
- Flexibility
- Convenience
- Risks

Standard: HS.PFE.A.3

Standards Statement

Analyze the long-term impacts of high and low credit scores.

Key Concepts

- Students can understand short-term impact of credit scores including, but not limited to:
  - Access to credit options
  - Interest rates
  - Insurance premiums
  - Loan costs
  - Utilities and services

- Students can understand long-term impact of credit scores including, but not limited to:
  - Financial security
  - Retirement
  - Overall wealth accumulation
  - Inability to secure a loan
  - Inability to rent an apartment/house
  - Interest paid over time in comparison to credit score

Appendix B: Banking, Investing, Saving and Repayment (HS.PFE.B) Key Concepts

Standard: HS.PFE.B.1

Standards Statement

Describe the roles of various types of financial institutions, and explore products and services provided by these institutions.

Key Concepts

- Students can understand the roles of various types of financial institutions, which could include, but are not limited to:
    - Banks
    - Brokerage Firms
    - Credit Unions
    - Online Lenders
    - Consumer Financial Protection Bureau
    - Internal Revenue Service (IRS)
- Students can explore products and services provided by various financial institutions, which could include, but are not limited to:
    - Checking accounts
    - Savings accounts
    - Automated Teller Machines (ATMs)
    - Check cashing services
    - Loans (e.g. personal, car, mortgage, education)
    - Investment accounts and services (e.g., stocks, mutual funds, bonds, certificates of deposit, annuities, IRAs, 401K)
    - Crypto transactions
    - Electronic transfers (e.g., Venmo, PayPal)

Standard: HS.PFE.B.2

Standards Statement

Develop goals for building assets using various investment options, and identify potential risks and rewards for a given strategy.

Key Concepts

- Students can develop goals for building assets which could include, but are not limited to:
    - Understanding that building wealth involves setting financial goals

    - Identify short, medium, and long-term goals and consider future needs (e.g., savings, retirement, major purchases)
    - Importance of starting early to benefit from compounding interest or yields over time
- Students can understand various investment options which could include, but are not limited to:
    - Explain the benefits of tax-advantaged retirement accounts (e.g., 401(k), IRA)
    - Discuss investing in individual company stocks and dividends earned
    - Explain fixed-income investments
    - Explore diversified investment funds (e.g., Mutual Funds and Exchange Traded Funds)

Standard: HS.PFE.B.3

Standards Statement

Evaluate repayment strategies, risks and costs for various types of consumer credit use, including simple or compound interest calculations.

Key Concepts

- Students can evaluate repayment strategies for various types of credit options which could include, but are not limited to:
    - Revolving Credit Repayment
    - Installment Credit Repayment
    - Variable and fixed interest rates
    - Debt Management Plans (DMP)
    - Revised Budget Planning
    - Borrowing agreements
    - Bankruptcy
    - Short-term payday loans

Appendix C: Budgeting, Spending and Money Management (HS.PFE.C) Key Concepts

Standard: HS.PFE.C.1

Standards Statement

Describe budgeting strategies for savings goals, emergency funds, fixed expenses and variable expenses.

Key Concepts

- Students can describe a variety of financial strategies to meet savings goals, that could include, but are not limited to:
    - Automatic Transfers
    - Reserve Funds
    - Emergency Funds
    - Fixed Expenses
    - Variable Expenses
- Students can incorporate budgeting tools which could include, but are not limited to:
    - Banking Tools and Apps
    - Spreadsheets
    - Worksheets
    - Third-party Apps

Standard: HS.PFE.C.2

Standards Statement

Identify and examine the costs and benefits of financial decisions.

Key Concepts

- Students can name a variety of financial goals that could include, but are not limited to:
    - Saving for an emergency fund
    - Paying off debt
    - Financing for education
    - Buying a home
    - Saving for retirement
    - Starting a business
    - Lifestyle choices (e.g., travel)
    - Communal savings (e.g., future and family-oriented goals)
- Students can examine goals that include, but are not limited to:
    - Identifying alignment of the goal to values and priorities
    - Estimating the amount and time needed for the goal

- Evaluating the trade-offs of spending decisions

Standard: HS.PFE.C.3

Standards Statement

Apply a budgeting strategy to create a sample budget that includes common costs associated with housing, transportation, and insurance products and analyze the outcomes.

Key Concepts

- Students can plan a budget by taking steps such as, but not limited to:
  - Setting financial goals (e.g., personal and communal savings, investments, emergency funds, retirement)
  - Make a plan for expenses
  - Monitoring your budget (e.g., understanding available tools to assist)
  - Tracking income and expenses (e.g., fixed and variable expenses)
  - Analyzing spending habits
- Students can select from a variety of factors to consider in a sample budget, which could include, but are not limited to:
  - Income
  - Expenses
  - Savings
  - Insurance (e.g., health, life, disability, car, house)
  - Inflation

Appendix D: Personal Income, Taxes and Services (HS.PFE.D) Key Concepts

Standard: HS.PFE.D.1

Standards Statement

Define and identify examples of common types of income.

Key Concepts

- Students can identify common types of income including, but not limited to:
    - Gross and net income
    - Income from full-time and part-time employment
    - Self-employment income
    - Interest, investments and dividend income
    - Active and passive income
    - Salary and hourly wages
    - Employee vs Independent contractor
    - Windfall income (e.g., tax refund per capita Tribal payment, inheritance)

Standard: HS.PFE.D.2

Standards Statement

Understand the personal income tax filing cycle, including common tax forms and available tax preparation resources and options.

Key Concepts

- Students can describe the responsibilities for personal tax filing including, but not limited to:
    - Annual tax cycles
    - Deductions (standardized versus itemized) and Subtractions
    - Tax withholdings and estimated payments
    - Threshold for income to file taxes
    - Dependency status
    - Tax brackets
    - Repayment options
- Students can understand state and federal tax forms and available tax resource options including, but not limited to:
    - Tax forms (e.g., W-2, W-4, I-9, 1040, 1099, 1098, OR-W-4, OR-40, Schedule C, Schedule SE)
    - Filing taxes and preparation resources and options (e.g., tax advisor, Certified Public Accountant, software, Direct File, Direct File Oregon and free tax filing options)
    - Tax forms for owning a business

Standard: HS.PFE.D.3

Standards Statement

Understand taxes associated with various sources of income and common tax credits that could reduce individual tax liability.

Key Concepts

- Students can compare tax liabilities for common sources of income including, but not limited to:
    - Earned Income
    - Interest and Dividends
    - Capital Gains
    - Self-Employment
- Students can identify common tax credits to reduce overall income taxes including, but not limited to:
    - Child Tax Credit (CTC) and the Oregon Kids Credit
    - American Opportunity Tax Credit
    - Lifetime Learning Credit
    - Earned Income Tax Credit (EITC)
    - Oregon Earned Income Credit (EIC)
    - Oregon Earned Income Credit for ITIN Filers (EIC-ITIN)
    - Oregon Exemption Credit
    - Oregon Surplus Credit

Standard: HS.PFE.D.4

Standards Statement

Understand common types of federal, state, regional, and local taxes and associated tax-funded services provided.

Key Concepts

- Students can understand various federal and state taxes including, but not limited to:
    - Income taxes
    - Social Security and Medicare Taxes (e.g., FICA)
    - Excise taxes
    - Sales tax
    - Vehicle registration fees
    - Estate and inheritance taxes
- Students can understand various local and regional taxes including, but not limited to:
    - Local sales taxes
    - Property tax
    - Occupational taxes

Appendix E: Maintaining Financial Well-being (HS.PFE.E) Key Concepts

Standard: HS.PFE.E.1

Standards Statement

Analyze the psychology of money through cultural, social, and emotional influences on financial behavior.

Key Concepts

- Students can compare and contrast cultural influences on financial behavior including, but not limited to:
    - Consumption
    - Savings rates
    - Investment choices
    - Community-based financial management approaches (e.g., community financing, kinship lending models, money pools, microloans, loan clubs, and other types of cultural financial lending)
- Students can identify social influences on financial behavior including, but not limited to:
    - Peer pressure
    - Marketing strategies
    - Social trust
    - Expectations around when individuals should meet financial goals
- Students can identify emotional influences on financial behavior including, but not limited to:
    - Loss aversion (e.g., fear tactics)
    - Overconfidence bias
    - Recency bias
    - Ambiguity aversion
    - Herd mentality
    - Stress avoidance (e.g., negative stressors, bad news)

Standard: HS.PFE.E.2

Standards Statement

Analyze and apply multiple sources of information when making consumer decisions.

Key Concepts

- Students can analyze and apply multiple sources of information before making consumer decisions including, but not limited to:
    - Advertisements

    - Reviews
    - Interest rates
    - Applicable fees
    - Consumer movements
    - Personal preferences

Standard: HS.PFE.E.3

Standards Statement

Understand and apply strategies to prevent fraud and personal identity theft.

Key Concepts

- Students can understand and apply possible actions to protect against fraud and personal identity theft including, but not limited to:
    - Monitoring accounts
    - Passwords
    - Online safety and WiFi protection
    - Secure documents and computers
    - Monitor personal information
    - Understanding dark patterns

Amplify.

April 18, 2024

State Superintendent of Public Instruction
Oregon Department of Education

Re: Substitution Request for
Amplify Math, grade 6 - Alg. 1 > Amplify Desmos Math, grade 6 - Alg. 1

Dear Sir or Madam:

It is with great pleasure that we submit Amplify Desmos Math, grades 6 - Alg. 1, for consideration to substitute for Amplify Math, grades 6 - Alg. 1, a program that was reviewed and approved for adoption by the Oregon Department of Education in 2022. Please find details for the adopted and substitution titles to follow:

Category	Title	Author	Copyright	Publication Date
Adopted Title				
Cat. 3: Math 6-8	Amplify Math, 6-8	Amplify	2023	1/1/2021
Cat. 5: Math HS, 3rd Credit	Amplify Math, Alg. 1	Amplify	2023	1/1/2021
Substitution Title				
Cat. 3: Math 6-8	Amplify Desmos Math, 6-8	Amplify	2026	4/1/25
Cat. 5: Math HS, 3rd Credit	Amplify Desmos Math, Alg. 1	Amplify	2026	4/1/25

Please note that if approved for substitution, Amplify Desmos Math, grade 6 - Alg. 1, will be supplied to Oregon schools at the contract price of the originally adopted title, Amplify Math, grade 6 - Alg. 1.

Amplify Desmos Math can be reviewed via the links and credentials listed below :

- Amplify Desmos Math Grade 6 Review link
- Amplify Desmos Math Grade 7 Review link
- Amplify Desmos Math Grade 8 Review link
- Amplify Desmos Math Algebra 1 Review link

Teacher Login: t1.oregonmath@demo.tryamplify.net
Student Login: s1.oregonmath@demo.tryamplify.net

Password: Amplify1-oregonmath

We believe this updated edition of our core math program provides a compatible experience with improved student and teacher digital content, powerful new teaching and learning tools that leverage Desmos Classroom technology, and expanded differentiation support.

Amplify Desmos Math and Amplify Math share the same instructional, pedagogical, and curricular approach since both are built on the foundation of Illustrative Mathematics, a research-based program that has earned an all-green rating from EdReports. Like Amplify Math, Amplify Desmos Math focuses on collaborative problem solving, a structured approach to problem-based learning, and elevating student thinking.

Educators and students who transition to Amplify Desmos Math will encounter the same familiar course, unit, and lesson structure, with an improved scope and sequence. Lessons continue to be structured in the same consistent organization - Warm-up, Activities, Summary and Synthesis, Lesson Assessment,, and Practice. As a result, school districts transitioning to Amplify Desmos Math will find little need for new implementation training or professional development for the pedagogy and core instruction.

New features in Amplify Desmos Math include expanded differentiation support and personalized practice. In addition, the program offers an enhanced teacher dashboard that supports teachers to facilitate engaging discussions built using the Desmos platform. All lessons in Amplify Desmos Math can be taught using print, though many recommended for digital use. In these digitally recommended lessons, the lesson support in the the consumable Student Edition is tightly aligned with digital student screens, so students can

learn digitally, using print, or a combination of both.

In sum, Amplify Desmos Math is designed to support a smooth transition from Amplify Math while expanding and strengthening upon the previous edition, and creating a new curiosity-driven program that motivates your students and fuels their inherent love for math.

Program Comparison

Feature/ Component	Amplify Math	Amplify Desmos Math
Scope and Sequence	Based on Illustrative Mathematics	Based on Illustrative Mathematics
Unit Structure	Pre-Unit Assessment Lessons Mid-Unit Assessment End-of-Unit Assessment Performance Task	Pre-Unit Check Lessons Practice Days Sub-Unit Quiz End-of-Unit Assessment
Lesson Model	Warm-up Activities* Summary and Synthesis Exit Ticket Lesson Practice *Activities follow Launch, Monitor, Connect structure	*Same as Amplify Math* Show What You Know
Practice	Lesson Practice (print, digital) Item Bank	*Same as Amplify Math*
Student Print	Full color student consumable	Full color student consumable that offers 1:1 parity between digital and print for all lessons

Teacher Print	Teacher Edition that provides full unit and lesson prep and instructional support for every lesson, including differentiation support and support for multilingual learners	*Same as Amplify Math*
Assessments	BOY Assessment Pre-Unit Assessment Mid-Unit Assessment End-of-Unit Assessment Exit Tickets (every lesson)	BOY Assessment Pre-Unit Check Sub-Unit Quiz End-of-Unit Assessment Show What You Know (every lesson)
Reporting	Teacher Reports • Performance reports showing performance on assessment and exit tickets • Standards reports showing progress toward mastery of standards Admin Reports • Usage reports showing logins, unit completion, and work submission • Performance reports for assessments	Teacher Reports • Assessment Report: Data on student/class performance on core curriculum unit assessments and BOY assessment • Standard Report: Data on student/class performance on specific standard(s). Admin Reports • Usage reports • Performance reports
Differentiation	Differentiation support at point of use	Differentiation support at the point of use Post-lesson differentiation that provides support, strengthen, and stretch resources and guidance based on results from Show What You Know, including: • Mini-lessons • Extensions • Personalized practice • Fluency practice

Customization	Digital and print materials are not customizable	All student facing print and digital content is customizable, and as are teacher presentation screens. All student-facing print materials (print lessons, practice, assessments) can be edited using Google docs.

Additional Program Details and Comparison

Amplify Math Program Components

Student



Student Edition
2 volumes



Student license, with full digital lesson, practice and assessment



Hands-on Manipulative Kit (optional)

Teacher



Teacher Edition
2 volumes

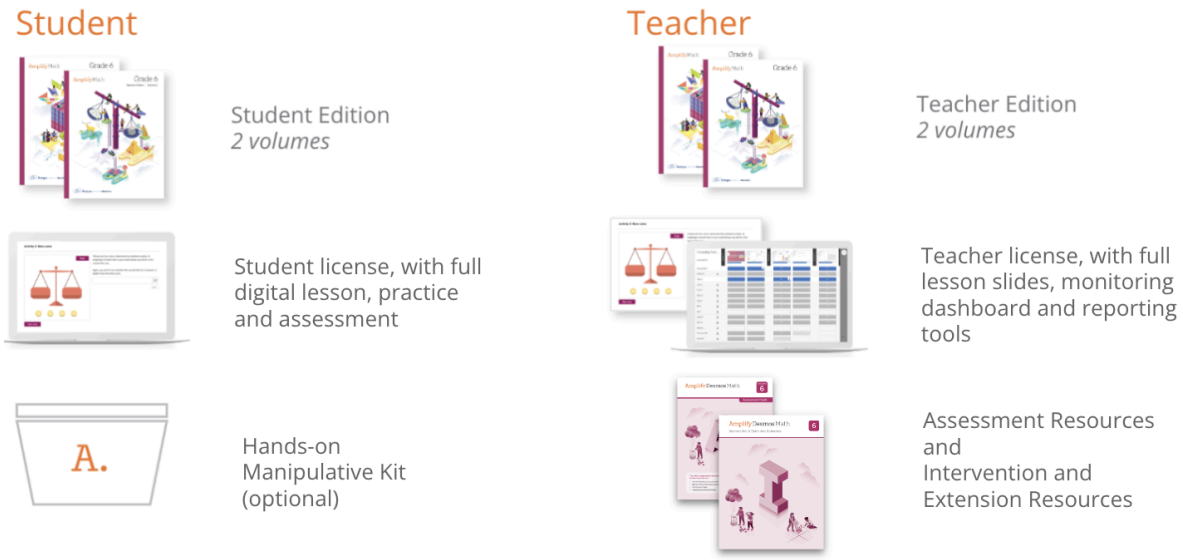


Teacher license, with full lesson slides, monitoring dashboard and reporting tools



Assessment Resources

Amplify Desmos Math Program Components



**NOTE: Amplify Desmos Math will include the Intervention and Extension resources in 2025-2026.*

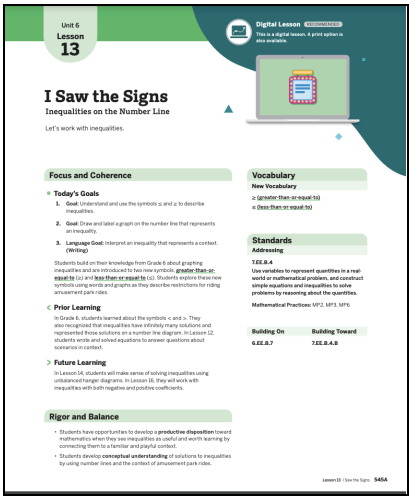
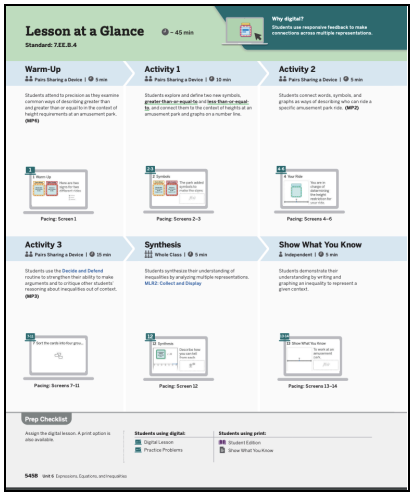
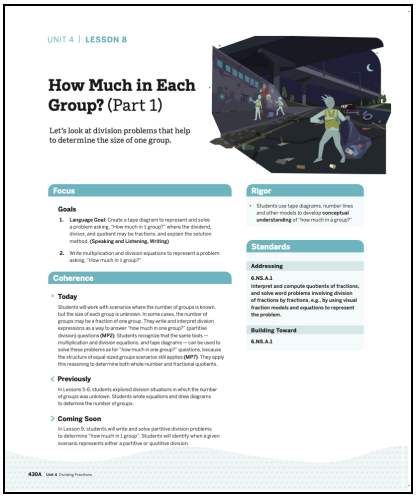
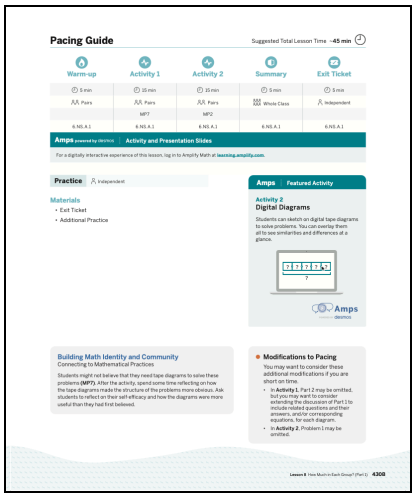
Teacher Edition

Both Amplify Math and Amplify Desmos Math include a full-color Teacher Edition that includes comprehensive teacher guidance for planning, prep, and lesson delivery.

Both programs' Teacher Editions include:

- A Unit Overview for each unit with planning and prep information
- Information on unit assessments and related differentiation supports
- Lessons
    - Lesson overview that includes standards, focus, coherence, and rigor
    - Instructional activities that follow a Launch, Monitor, Connect framework
    - Differentiation support at the point of use

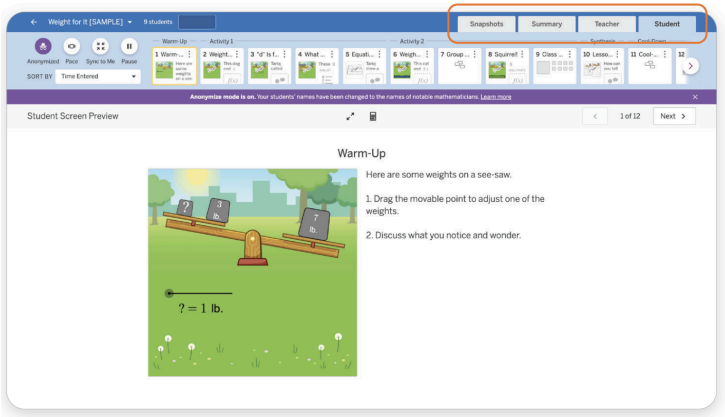
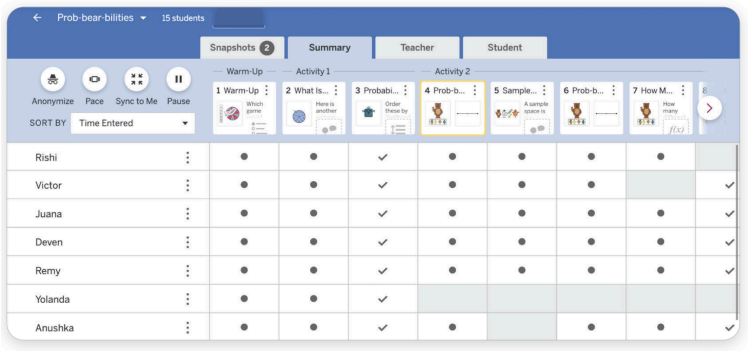
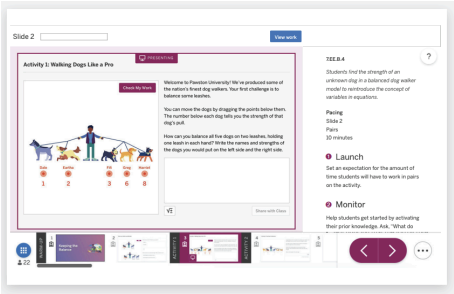
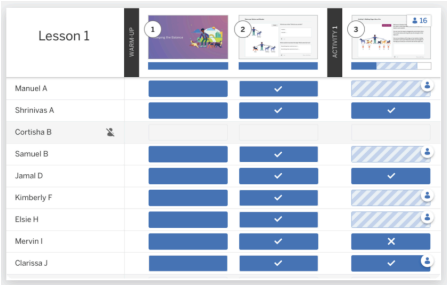
Every lesson in Amplify Desmos Math can be taught with students using print. When a lesson is best taught with students on devices, there is additional guidance in the Teacher Edition to support students on devices and those using pages from the Student Edition.

Amplify Desmos Math Teacher Edition	 Unit 6 Lesson 13 I Saw the Signs Inequalities on the Number Line Let's work with inequalities. Digital Lesson RECOMMENDED This is a digital lesson. A print option is also available. Focus and Coherence Today's Goals 1. Goal: Understand and use the symbols ≤ and ≥ to describe inequalities. 2. Goal: Draw and label a graph on the number line that represents an inequality. 3. Language Goal: Interpret an inequality that represents a context. (Writing) Students build on their knowledge from Grade 6 about graphing inequalities and are introduced to two new symbols, greater-than-or-equal-to (≥) and less-than-or-equal-to (≤). Students explore these new symbols using words and graphs as they describe restrictions for riding amusement park rides. Prior Learning In Grade 6, students learned about the symbols < and >. They also recognized that inequalities have infinitely many solutions and represented those solutions on a number line diagram. In Lesson 12, students wrote and solved equations to answer questions about scenarios in context. Future Learning In Lesson 14, students will make sense of solving inequalities using unbalanced hanger diagrams. In Lesson 16, they will work with inequalities with both negative and positive coefficients. Rigor and Balance • Students have opportunities to develop a productive disposition toward mathematics when they see inequalities as useful and worth learning by connecting them to a familiar and playful context. • Students develop conceptual understanding of solutions to inequalities by using number lines and the context of amusement park rides. Vocabulary New Vocabulary ≥ (greater-than-or-equal-to) ≤ (less-than-or-equal-to) Standards Addressing 7.EE.B.4 Use variables to represent quantities in a real-world or mathematical problem, and construct simple equations and inequalities to solve problems by reasoning about the quantities. Mathematical Practices: MP2, MP3, MP6 Building On: 6.EE.B.7 Building Toward: 7.EE.B.4.B 545A  Lesson at a Glance 45 min Standard: 7.EE.B.4 Why digital? Students use responsive feedback to make connections across multiple representations. Warm-Up Activity 1 Activity 2 Activity 3 Synthesis Show What You Know Prep Checklist 545B Unit 6 Expressions, Equations, and Inequalities
Amplify Math Teacher Edition	 UNIT 4 | LESSON 8 How Much in Each Group? (Part 1) Let's look at division problems that help to determine the size of one group. Focus Goals 1. Language Goal: Create a tape diagram to represent and solve a problem asking, "How much in 1 group?" where the dividend, divisor, and quotient may be fractions, and explain the solution method. (Speaking and Listening, Writing) 2. Write multiplication and division equations to represent a problem asking, "How much in 1 group?" Coherence Today Students will work with scenarios where the number of groups is known, but the size of each group is unknown. In some cases, the number of groups may be a fraction of one group. They write and interpret division expressions as a way to answer "how much in one group?" (partitive division) questions (MP2). Students recognize that the same tools – multiplication and division equations, and tape diagrams – can be used to solve these problems as for "how much in one group?" questions, because the structure of equal-sized groups scenarios still applies (MP7). They apply this reasoning to determine both whole-number and fractional quotients. Previously In Lessons 5-6, students explored division situations in which the number of groups was unknown. Students wrote equations and drew diagrams to determine the number of groups. Coming Soon In Lesson 9, students will write and solve partitive division problems to determine "how much in 1 group". Students will identify when a given scenario represents either a partitive or quotitive division. Rigor • Students use tape diagrams, number lines and other models to develop conceptual understanding of "how much in a group?" Standards Addressing 6.NS.A.1 Interpret and compute quotients of fractions, and solve word problems involving division of fractions by fractions, e.g., by using visual fraction models and equations to represent the problem. Building Toward 6.NS.A.1 430A Unit 4 Dividing Fractions  Pacing Guide Suggested Total Lesson Time ~45 min Warm-up Activity 1 Activity 2 Summary Exit Ticket Amps powered by DESMOS Activity and Presentation Slides Practice Independent Materials • Exit Ticket • Additional Practice Amps Featured Activity Activity 2 Digital Diagrams Building Math Identity and Community Connecting to Mathematical Practices Modifications to Pacing You may want to consider these additional modifications if you are short on time. • In Activity 1, Part 2 may be omitted. Consider using this time for extending the discussion of Part 1 to include related questions and their answers, and/or corresponding equations, for each diagram. • In Activity 2, Problem 1 may be omitted. Lesson 8 How Much in Each Group? (Part 1) 430B

Teacher Digital | Dashboard

Both programs include a teacher dashboard that allows teachers to monitor student work in real time, present student work, and facilitate active discussions.

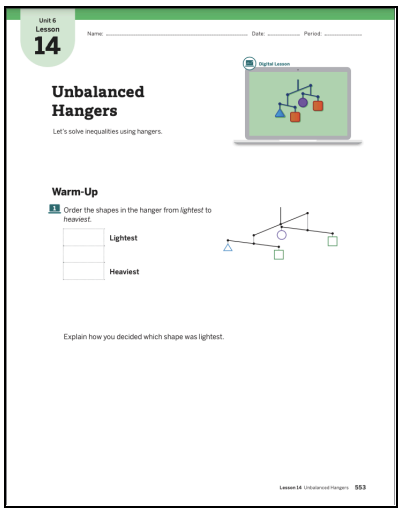
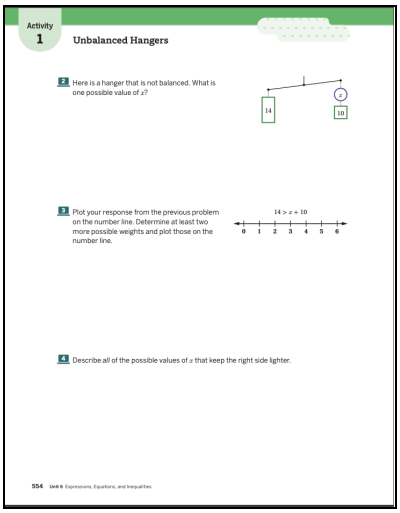
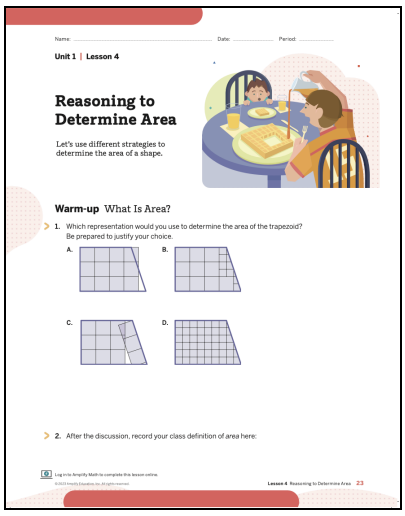
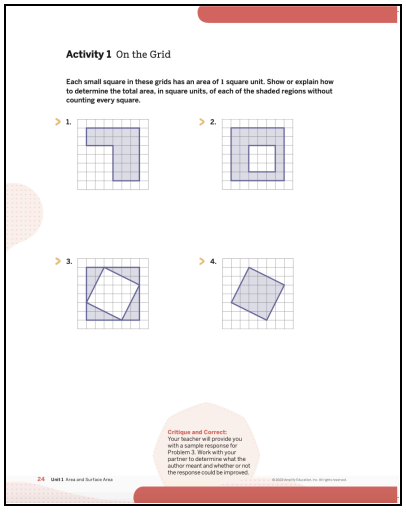
The Amplify Desmos Math dashboard additionally allows teachers to snapshot work on Student Activity Screens in order to sequence student work and leave written feedback on student thinking.

Amplify Desmos Math Teacher Dashboard	 
Amplify Math Teacher Dashboard	 

Student Edition

Both programs provide a consumable Student Edition with full-color pages for every lesson and practice.

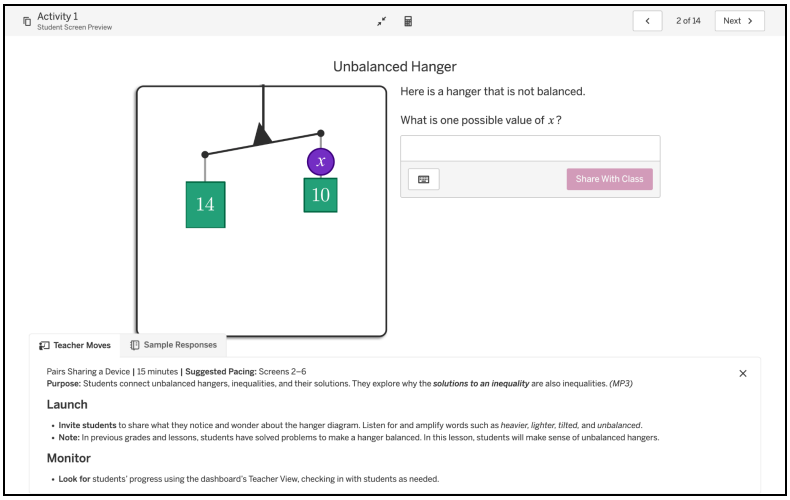
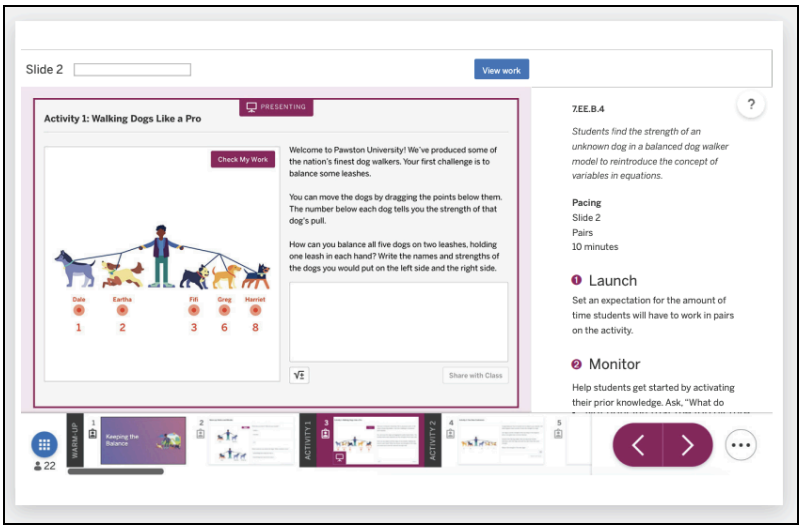
With Amplify Desmos Math, every lesson can be completed off-device if needed to meet student needs or to support note-taking. Teachers have the flexibility to use print and digital in the same classroom during the same lesson. Amplify Desmos Math Student Editions are “mirror” or align to Student Activity Screens, allowing teachers flexibility to have some or all learners using print during digital lessons. Spanish Student Editions will be ready for the 2025-26 school year.

Amplify Desmos Math Student Edition	 
Amplify Math Student Edition	 

Student Digital | Activity Screens

Amplify.

Amplify Math and Amplify Desmos Math include interactive activity screens built with the Desmos Activity Builder that surface student thinking and spark interesting and productive discussions. For teachers, all screens in both programs include teacher moves, providing guidance for pacing, discussion questions, and sample student responses.

Amplify Desmos Math Student Activity Screen	
Amplify Math Student Activity Screen	

Thank you for your consideration of Amplify's substitution request. We look forward to any questions you may have and the outcome of your review.

Sincerely,

Amplify.

Brad Shank
Vice President, Product, Core Math
Amplify Education

April 1, 2024

Ms. Aujalee Moore
Instructional Materials Coordinator
Oregon Department of Education
255 Capitol Street NE
Salem, OR 97310

Dear Ms. Moore,

National Geographic Learning, a part of Cengage, is requesting a substitution for a digital product that accompanies one of the textbooks on contract with the state.

The digital product to be substituted is a platform called myELT and is primarily used for accessing accompanying online activities amongst students and teachers for our *Impact & Pathways* programs. The replacement platform will be available this summer and is called Spark.

We are looking to substitute myELT products on our upgraded online learning platform, Spark. The updated online learning platform allows for more stability, security and accessibility, along with other advantages including:

- Student's eBook brings the classroom to life with audio and video to encourage active participation
- Online Practice activities reinforce concepts and understanding with immediate feedback
- Course Gradebook helps students track their progress as the complete assignments and tests
- Online Tests provide convenient and affective assessment
- Mobile App for uninterrupted learning even when offline – anytime, anywhere

With this move, the student eBook, online practice, eAssessment, Classroom Presentation Tool, and teacher resources will be incorporated into Spark ISBNs. There will no longer be a need for separate ISBNs or purchases of those components.

Impact was bid in May 2021 under English Language Proficiency, Grades 5/6-8. *Impact* has a copyright of 2018 and publication dates from May 2016 and forward (please see the exact publication dates for each ISBN on the attached updated spreadsheet for both MyELT and Spark).

Pathways was bid in May 2021 under English Language Proficiency, Grades 9-12. *Pathways* has a copyright of 2018 and publication dates from October 2017 and forward (please see the exact publication dates for each ISBN on the attached updated spreadsheet for both MyELT and Spark).

We appreciate your consideration of this substitution. The complete substitution list is attached.

For additional information on the migration of myELT for, please visit this site – which features details around supporting teachers with this change for the upcoming school year.

The original contract price will remain the same for all substitutions we are requesting.

Thank you for your consideration and attention to this matter.

Sincerely,

Beverly M. Jones

Beverly M. Jones
Supervisor, Bid Support

April 22, 2024

Ms. Jenna Montgomer
Instructional Materials Coordinator
Oregon Department of Education
255 Capitol Street NE
Salem, OR 97310

Dear Ms. Montgomery,

National Geographic Learning, a part of Cengage, is requesting a substitution for a digital product that accompanies one of the textbooks on contract with the state.

The digital product to be substituted is a platform called myELT and is primarily used for accessing accompanying online activities amongst students and teachers for our *Perspectives* program. The replacement platform will be available this summer and is called Spark.

We are looking to substitute myELT products on our upgraded online learning platform, Spark. The updated online learning platform allows for more stability, security and accessibility, along with other advantages including:

- Student's eBook brings the classroom to life with audio and video to encourage active participation
- Online Practice activities reinforce concepts and understanding with immediate feedback
- Course Gradebook helps students track their progress as the complete assignments and tests
- Online Tests provide convenient and affective assessment
- Mobile App for uninterrupted learning even when offline – anytime, anywhere

With this move, the student eBook, online practice, eAssessment, Classroom Presentation Tool, and teacher resources will be incorporated into Spark ISBNs. There will no longer be a need for separate ISBNs or purchases of those components.

Perspectives was bid in May 2021 under English Language Proficiency, Grades 9-12. *Perspectives* has a copyright of 2018 and publication dates from July 2017 and forward (please see the exact publication dates for each ISBN on the attached updated spreadsheet for both MyELT and Spark).

We appreciate your consideration of this substitution. The complete substitution list is attached.

For additional information on the migration of myELT for, please visit this site – which features details around supporting teachers with this change for the upcoming school year.

The original contract price will remain the same for all substitutions we are requesting.

Thank you for your consideration and attention to this matter.

Sincerely,

Beverly M. Jones

Beverly M. Jones
Supervisor, Bid Support

SUBJECT: Substitution Requests for Instructional Materials (Cengage and Amplify Desmos), OAR 581-011-0086 **STAFF NAME & OFFICE**: Two different publishers have requested substitution for instructional materials on the State Board Approved list for ELP and Mathematics. **Amplify Substitution Request** The publisher Amplify has requested substitution for the 2021 version of Amplify math materials (Grades 6-8), adopted by the State Board of Education in 2022, to the updated version of Amplify Desmos Math (which will be available for publication in 2025). **Cengage Substitution Requests** The publisher Cengage has also requested substitution for a digital product that accompanies two of their textbooks on contract: *Perspectives* (copyright 2018) and *Impact* (copyright 2018). For each program, Cengage requests to substitute the online platform Sparks for their former online platform, called myELT. ☐New Rule ☐Amend Existing Rule ☐Repeal Rule	☐**First Reading** ☐**Presentation** ☐**No Presentation** ☒ **Action** ☐**Temp Rule** ☐**Presentation** ☒**No Presentation**

BACKGROUND

Amplify Substitution Request

The State Board of Education adopted Amplify Math, Grades 6-8 as recommended instructional resources for mathematics in October 2022. After the initial adoption in 2022, Amplify merged with the platform Desmos and released an updated version of their program called Amplify Desmos Math. The updated version, which will be available for widespread public use in 2025, meets the mathematics adoption criteria set by the State Board of Education in 2022. The updated program provides a compatible experience, which includes expanded differentiation support and some new learning tools that leverage Desmos Classroom technology.

Mark Freed, ODE's Mathematics Education Specialist, has completed a review of the materials to confirm that they are an appropriate update. Additionally, Northwest Textbook Depository was engaged to confirm that the update was appropriate and would not negatively affect districts currently using the version of Amplify adopted in 2022. Districts would now be able to purchase the updated version of Amplify Desmos for a contract price through Northwest Textbook Depository without conducting a formal independent adoption. Substituted materials will be supplied to Oregon schools at the contract price of the originally adopted edition unless the price for the substituted edition is lower than the original contract price.

The State Board of Education has the discretion to approve the update to Amplify Desmos or decline Amplify's request to update the materials from the 2023 edition to the 2024 edition. ODE recommends

that the State Board of Education approve adding the new edition of Amplify Desmos to the list of recommended mathematics instructional materials.

Cengage Substitution Requests

The publisher Cengage also submitted two substitution requests. The State Board of Education adopted two programs from Cengage in October 2021 (*Impact,* and *Perspectives*) as recommended resources for English Language Proficiency. Since then, Cengage has updated the online platform that accompanies their printed instructional materials for both of their programs. They are requesting permission to substitute their new online platform, Sparks, for the previous version of the online program, called myELT. This platform update improves some features within their program, including allowing for offline access to their digital resources, and simplifying some processes for assigning materials. This update is largely technical rather than pedagogical, and each of Cengage's programs continue to meet the English Language Proficiency criteria established in 2021. They can be used interchangeably with the previous platform.

Ben Wolcott (English Language Proficiency Assessment Specialist) and Jennifer Fontana (Multilingual Education Specialist) have completed a review of the materials to confirm that they are an appropriate update based on the changes identified by the publisher. This update would be provided at the same contract pricing as the previous version, and would be available to districts as soon as the program launches. It would not impact student or teacher editions of materials.

The State Board of Education has the discretion to approve the update from myELT to Sparks or decline Cengage's request to update their digital platform. ODE recommends that the State Board of Education approve this update to *Impact* and *Perspectives* from Cengage.

While Cengage originally submitted a substitution request for a third program (*Pathways*), it was withdrawn until further notice, as the update to *Pathways* also included substantial changes to physical materials, which still need to be reviewed.

SUMMARY OF PREVIOUS BOARD ACTION

The Board has approved similar substitution requests under OAR 581-011-0086, including a substitution request for English Language Arts instructional materials in September of 2023, and for Mathematics instructional materials in February of 2022.

HAS THE RULE CHANGED SINCE LAST BOARD MEETING?

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

POLICY ISSUE OR CONCERNS

Amplify Substitution Request

The impact of this approval is that districts will be allowed to purchase the updated edition of Amplify Desmos for a stable contract price, guaranteed through January 2030, without conducting a formal independent adoption.

Cengage Substitution Requests

Similarly, the impact of approving Cengage's requests is that districts will be allowed to purchase the updated editions of*, Impact* and *Perspectives* for stable contract prices, guaranteed through January 2028, without conducting a formal independent adoption.

Independent adoptions require districts to invest resources (time, labor, funds) in order to purchase and implement the materials. Since ODE has already reviewed the materials and confirmed they are appropriate for recommendation, districts who choose to use Amplify Desmos, *Impact*, or *Perspectives* will be positively impacted. All three substitutions would allow districts access to updated materials while maintaining the current contract price. ODE has considered all unintended consequences, and recommends the approval of all three substitutions.

EQUITY IMPACT ANALYSIS

Amplify Substitution Request

According to the publisher, this update expands differentiation support, and improves opportunities for collaboration, personalization, and problem-based learning. Districts who serve historically underserved populations will now have access to these updated mathematics materials for the same price as the currently recommended edition. Approving this substitution request will help to ensure that Oregon students in districts that use Amplify get equitable access to up-to-date materials.

Cengage Substitution Requests

According to the publisher, the "updated online learning platform allows for more stability, security, and accessibility" of their ELP program. In general, this update increases usability of instructional materials designed to support English Language Learners in reaching proficiency. Districts who utilize Cengage's materials to serve their multilingual learners will benefit from this substitution, as the new platform makes Cengage's platform more accessible for students. Approving this substitution request will help to ensure that Oregon students in districts that use Cengage get equitable access to an improved online platform.

FISCAL ANALYSIS

Amplify Substitution Request

The proposed update to Amplify Desmos is fiscally beneficial to districts. Allowing the material to be officially updated gives districts the opportunity to purchase the new edition of Amplify's program for the contract price of the version adopted in 2022. If this substitution request were denied, districts could still make the decision to adopt Amplify Desmos independently; however, under these circumstances, districts would not benefit from locked-in contract pricing. If, on the other hand, the Board approves substitution, Amplify Desmos would be required to offer materials for the contract price established in 2022. In this way, substitution helps ensure cost savings for districts.

Cengage Substitution Request
The proposed updates to *Impact,* and *Perspectives* are fiscally beneficial to districts. Allowing the materials to be officially updated gives districts the opportunity to purchase the new editions of Cengage's programs for the contract price of the version adopted in 2021. Similar to above, this will ultimately lead to cost savings for districts, as districts will not need to negotiate contract pricing with publishers.

EFFECT OF A "YES" OR "NO" VOTE

Amplify Substitution Request

A "YES" vote would allow ODE to substitute the updated version of Amplify Desmos Math (grades 6-8) for the previous version of Amplify Math (grades 6-8) on the mathematics instructional materials list for the remainder of the contract period (through January 2030).

A "NO" vote would deny the publisher's request to substitute the updated edition of Amplify Desmos Math on the mathematics instructional materials list

Cengage Substitution Request

A "YES" vote would allow the publisher Cengage to substitute the digital platform that accompanies their printed instructional materials, called myELT, for their updated digital platform, called Sparks, for their programs, *Perspectives* and *Impact,* which are currently on the ELP instructional materials list (through January 2028).

A "NO" vote would deny the publisher's request to substitute the digital platform that accompanies their printed instructional materials, called myELT, for their updated digital platform, called Sparks.

STAFF RECOMMENDATION

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

ATTACHMENTS

Attachment 1: Amplify Desmos Substitution Request
Attachment 2: Cengage Impact Substitution Request
Attachment 3: Cengage Perspectives Substitution Request

OREGON DEPARTMENT OF EDUCATION
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OREGON AT-A-GLANCE SCHOOL PROFILE

Eagle Charter School

PRINCIPAL: Marie Ballance | GRADES: K-5 | 999A Locust Ave NE, Salem 97301 | 503-339-7114

2022-23

Students We Serve

149
Student Enrollment

DEMOGRAPHICS

American Indian/Alaska Native	
Students	1%
Teachers	8%
Asian	
Students	1%
Teachers	0%
Black/African American	
Students	5%
Teachers	0%
Hispanic/Latino	
Students	17%
Teachers	0%
Multiracial	
Students	11%
Teachers	8%
Native Hawaiian/Pacific Islander	
Students	0%
Teachers	0%
White	
Students	65%
Teachers	85%

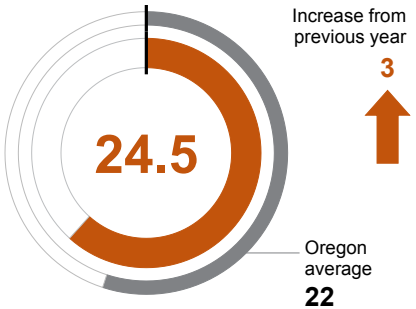
*		7
Ever English Learners		Languages Spoken
14%	94%	>95%
Students with Disabilities	Required Childhood Vaccinations	Free/ Reduced Price Lunch

*<10 students or data unavailable

School Environment

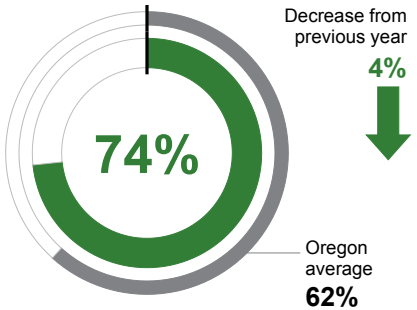
CLASS SIZE

Median class size.



REGULAR ATTENDERS

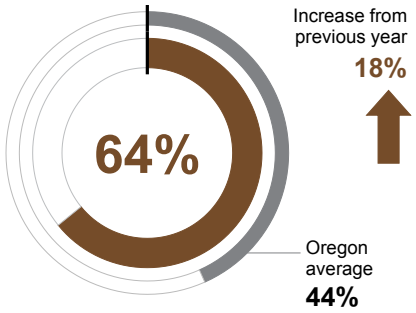
Students who attended more than 90% of their enrolled school days.



Academic Success

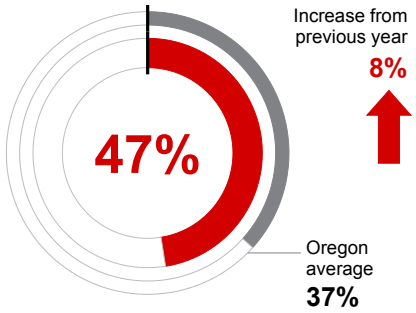
ENGLISH LANGUAGE ARTS

Students meeting state grade-level expectations.



MATHEMATICS

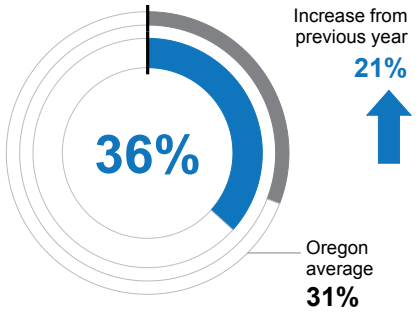
Students meeting state grade-level expectations.



SCIENCE

244

Students meeting state grade-level expectations.



School Goals

Our school is committed to helping every child reach their full potential through MicroSociety classes, engaging instruction, school-wide behavior expectations, targeted interventions and extensions, and family engagement. As we strive to increase the number of students who regularly attend school, we collaborate with community partners to help families overcome barriers that affect school attendance.

State Goals

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

Safe & Welcoming Environment

Everyone is welcome at Eagle regardless of race, gender identity, sexuality, immigration status, country of origin, socioeconomic status, disability, or other factors. All students are entitled to academic success regardless of their background or family circumstances and each student will be provided the necessary support to ensure that success. We use PBIS, school counseling programs, social-emotional learning, and an equity team to ensure Eagle has a welcoming environment.

School Website: www.eaglecharter.org

Eligibility for Free/Reduced Price Lunch expanded in 2020-21, for more information please visit: www.oregon.gov/ode/schools-and-districts/reportcards/reportcards/Pages/Accountability-Measures.aspx

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OREGON AT-A-GLANCE SCHOOL PROFILE CONTINUED

Eagle Charter School

2022-23

Our Staff (rounded FTE)

7 Teachers

2 Educational assistants

1 Counselors/ Psychologists/ Social Workers

76% Average teacher retention rate over the past three years

100% % of licensed teachers with more than 3 years of experience

Yes Same principal in the last 3 years

Outcomes

	REGULAR ATTENDERS	ENGLISH LANGUAGE ARTS	MATHEMATICS
American Indian/Alaska Native	<10 students or data unavailable	<10 students or data unavailable	<10 students or data unavailable
Asian	<10 students or data unavailable	<10 students or data unavailable	<10 students or data unavailable
Black/African American	<10 students or data unavailable	<10 students or data unavailable	<10 students or data unavailable
Hispanic/Latino	44%	80%	60%
Multiracial	60%	<10 students or data unavailable	<10 students or data unavailable
Native Hawaiian/Pacific Islander	<10 students or data unavailable	<10 students or data unavailable	<10 students or data unavailable
White	82%	64%	53%
Free/Reduced Price Lunch	74%	64%	47%
Ever English Learner	<10 students or data unavailable	<10 students or data unavailable	<10 students or data unavailable
Students with Disabilities	71%	31%	19%
Migrant	<10 students or data unavailable	<10 students or data unavailable	<10 students or data unavailable
Homeless	<10 students or data unavailable	<10 students or data unavailable	<10 students or data unavailable
Students in Foster Care	<10 students or data unavailable	<10 students or data unavailable	<10 students or data unavailable
Military Connected	<10 students or data unavailable	<10 students or data unavailable	<10 students or data unavailable
Talented and Gifted	<10 students or data unavailable	<10 students or data unavailable	<10 students or data unavailable
Female	69%	68%	45%
Male	78%	59%	50%
Non-Binary	<10 students or data unavailable	<10 students or data unavailable	<10 students or data unavailable

245

About Our School

BULLYING, HARASSMENT, AND SAFETY POLICIES

Everyone is welcome in our school regardless of race, gender identity, sexuality, immigration status, country of origin, or other factors. We work collaboratively to ensure all students feel safe and free from hazing, harassment, intimidation, discrimination, bullying, and menacing. Our school staff create lessons to raise awareness about bullying and how to prevent and respond to it if witnessed. We are part of SafeOregon, a statewide platform to report unsafe behaviors to authorities. Eagle has two school counselors who teach anti-bullying lessons, provide social-emotional learning, use the Zones of Regulation, and have sensory break areas.

EXTRACURRICULAR ACTIVITIES

Enrichment Academy Program provided in partnership with YMCA.
Weekly ukulele classes for grades 3-5.
After school clubs and programs including Yarn Club (grades 3-5) and Soccer (grades 4-5).

PARENT ENGAGEMENT

Our school strives to partner with parents, caregivers, and families to support success for all students. There are many opportunities to get involved, including:
· Parent Club
· Family engagement evenings
· School events such as Holiday Bingo Night, Spring Dance, Jogathon, and more
· Guest speakers for MicroSociety
· Volunteering for field trips, events, and classroom or office support

COMMUNITY ENGAGEMENT

Eagle Charter School is open to K-5 students across Oregon. We exist because of parents, community members, and teachers who seek to create a unique public school. Eagle partners with local businesses, nonprofit organizations, and community members to enhance our education programs and support families. Each year, we provide all students with field trip opportunities to learn more about our local community. Call our office to learn more about opportunities to get involved.

Data are suppressed to protect confidential student information.

For more information please visit: www.oregon.gov/ode/schools-and-districts/reportcards/reportcards/Pages/Accountability-Measures.aspx

EAGLE Charter School
999A Locust St. NE
Salem, OR 97301
Ph: (503) 339-7114
Fax: (503) 990-6909
office@eaglecharter.org
www.eaglecharter.org

Eagle Charter School – Diversity Plan

Eagle Charter School is a small, state-sponsored charter elementary school located in Northeast Salem. As a school of choice, its population does not currently match that of the surrounding district. The staff and school board at Eagle Charter School are committed to diversity, equity, and inclusion, and have a plan to increase ethnic and racial diversity among the Eagle community by the end of our current charter (June 2027).

Demographics, 2023-2024

	Eagle Charter				Salem-Keizer			
	% White	% BIPOC	% SPED	% Ec Dis	% White	% BIPOC	% SPED	% Ec Dis
Students	66	34	22	*	40	60	18	*
Staff	85	15			83	17		
School Board	60	40						

*ECS and Salem-Keizer met the Community Eligibility to offer free breakfast and lunch to all students.

Goals:

1. Increase student racial/ethnic diversity by at least 15% (20 students) by 2027.
2. Increase staff diversity by at least 5% (1 employee) by 2027 *if there is a staff opening*.
3. Increase School Board diversity by 10% by 2027.

Expanding diversity in a small elementary charter school involves implementing a multifaceted approach that encompasses outreach, inclusive policies, community engagement, and a diverse curriculum. Eagle has some of these measures already in place.

Goal #1: Increase student racial/ethnic diversity by at least 10% by 2027.

New strategies:

- Implement a weighted lottery for the 2024-2025 school year to give enrollment preference to historically underserved students.
- Begin advertising in multiple languages.
- Create referral packets – information to distribute strategically with families to share with their community. This type of outreach has the potential to increase Eagle's word-of-mouth referrals, which is the primary way new families currently learn about and apply for Eagle Charter School.
- Conduct a BIPOC parent focus group or use surveys to determine how to best improve our inclusive and welcoming environment.
- Collaborate with other schools that have successfully diversified their student body to share best practices and strategies.

Current strategies:

- Inclusive policies and nondiscriminatory practices
- Community partnerships that foster a sense of connection
- Small school environment, family atmosphere
- Diverse, culturally responsive curriculum
- School counselor support for parents
- Home visits for every kindergarten and new-to-Eagle family
- Celebrations of diversity through artwork, bulletin boards, stories, and guest speakers.
- Strong language development support for English language learners.
- Current pen pal connections across the United States for grades 4 and 5.

Goal #2: Increase staff diversity by at least 5% by 2027 *if there is a staff opening*.

New strategies:

- Provide opportunities for parents/caregivers to provide feedback on diversity and inclusion initiatives and practices.
- Review job descriptions and postings for inclusive language and state that we are looking to diversify our staff; we encourage those with less traditional experiences to apply for interviews.
- Reach out to schools that have successfully diversified staff for tips and strategies.

Current strategies:

- Weighted rubric for employment interviews to give preference to historically marginalized groups.
- Advertise positions with parents, encouraging BIPOC parents who are interested to apply to open positions.
- Encourage parents of current Eagle students to become engaged in education by substituting as an instructional aide or teacher. (Past practices include parents

teaching language classes to students and serving as instructional assistants or substitute teachers.)
- Advertise positions with all Oregon universities with education programs.
- Professional development on cultural competence, implicit bias, and inclusive teaching practices.
- Voluntary staff book studies on the history of historically underserved or marginalized communities (some titles included So You Want to Talk About Race by Ijeoma Oluo, Caste: The Origins of Our Discontent by Isabel Wilkerson, An Indigenous People's History of the United States for Young People by Roxanne Dunbar-Ortiz, and The Deepest Well: Healing the Long-term Effects of Childhood Trauma and Adversity by Nadine Burke Harris)
- "Grow our own" when we can (For example: we created a partnership with an instructional aide who identifies as Indigenous to help her finish grad school to become a school counselor.)

One challenge that any charter school has in attracting and retaining a diverse workforce is that charter schools are funded at a much lower rate than neighborhood schools. In order to attract staff, Eagle may submit a request to the Oregon Department of Education in the future to receive at least 5% additional funding, bringing us to 95% of the funding levels of neighborhood schools instead of our current 90%. This would allow Eagle to be more competitive in its salary offerings.

Goal #3: Increase School Board diversity by 10% by 2027.

The Eagle Charter School Board currently has three women and two men on the Board. Board members include three individuals who identify as BIPOC.

New Strategies:
- Board members will attend more school events and reach out to BIPOC parents to encourage them to apply to the school board when there is an open position.
- Survey parents to see how to increase parent involvement in school board meetings.
- Create referral packets – information to distribute strategically to share about Eagle Charter School and the important work that the School Board does to encourage more participation by those in historically underserved groups.

Current Strategies:
- Board members reach out to coworkers to share about Eagle and encourage interested individuals to apply to Board openings.
- Administrator reaches out to all parents to recruit parent members for the Board with a specific consideration for BIPOC parents.

Implementing these strategies requires a committed effort from the school leadership, staff, and the community. By fostering an environment that values and supports diversity, Eagle Charter School can create a richer, more inclusive educational experience for all students.

Eagle Charter School
Charter Expansion Application, February 2024

I. Executive Summary

Demographic Information (Find a 3-year comparison of staff and student demographics here.)

Current Year Enrollment & Demographic Information	
Total Enrollment	
Grades Served	K-5
# of Students Enrolled	152
# of Students on Waiting List	96
Gender	
# Male	75
# Female	76
# Nonbinary	1
Ethnicity/Race	
# White	81
# Black	16
# Hispanic	8
# Asian	5
# Other	43
Special Populations	
# Students with Disabilities	33
# English Language Learners	10
# Homeless Students	0
# Eligible for Free and Reduced Lunch	>95%
Projected Enrollment and Grades Served	
Total Enrollment	

Projected Grades Served	K-6
Maximum Projected Enrollment	200

Proposed Expansion

Eagle Charter School is currently a K-5 elementary. We propose that Eagle expands to sixth grade beginning in the 2024-2025 school year. This sixth grade class is designed to be small. It is targeted to current Eagle students who are unwilling or unable to attend their large neighborhood school in the sixth grade and who applied for but did not get in to one of the two local charter middle schools in Salem-Keizer during the lottery process. Eagle would not accept transfer students into this grade. Therefore, the class would be capped at 25 students with an anticipated average class size of 15. The sixth grade would operate as an elementary self-contained classroom.

Rationale

This expansion is a strategic move that will bring numerous benefits to our education system and the students it serves. The key reasons why this expansion is highly advantageous are because of the academic excellence provided, improved diversity and inclusivity, and benefits for students who thrive in a small school environment in a large district that has limited middle school options.

Academic Excellence. Eagle Charter School's impressive performance on the Oregon Student Assessment System (OSAS) when compared to state averages and local school district performance is a testament to its dedication to academic excellence. ECS has worked hard to improve its academic foundations and the benefits of those efforts are evidenced in OSAS results. By allowing the school to expand to sixth grade, we can extend the track record of success and ensure that students receive a high-quality education throughout elementary and early middle school years.

Diversity and inclusion. Eagle has shown progress in diversifying its student body and school board. Moreover, inclusivity is a passion of the Eagle staff; many transfer students and families have expressed their relief and thanks that their children finally feel seen and accepted for who they are. By expanding into the sixth grade, Eagle can continue fostering this spirit of diversity and inclusivity throughout the elementary and early middle school years. This aligns with our commitment to offer equal educational opportunities to all students regardless of background or belief.

Small School Environment. Small schools have been shown to have numerous benefits, including better teacher-student ratios, more individualized attention, and a close-knit community. By keeping the sixth grade class to students who have been enrolled at Eagle for elementary school, we ensure that all the adults are very familiar with students and their parents and can be ready to offer whatever support is needed for success beginning on Day One. The additional year at Eagle may lead to better long-term educational outcomes. There is a shortage of middle school options for students in the local area. By allowing Eagle Charter to expand, it would address the gap and provide families with an attractive alternative to larger, less personalized middle school environments. This expansion would offer continuity in a familiar and supportive setting, promoting a smoother transition to higher grades.

The expansion of Eagle Charter School to include sixth grade is a logical progression that aligns with our goals of academic excellence, diversity, and inclusivity, and offering meaningful educational choice to students and families. This expansion would benefit our current students and broaden the local educational landscape.

Stability of staff, leadership

Eagle has stable board leadership. Our board is currently composed of three non-parents and two parents. There are two open positions on the board and no currently anticipated changes. The board used OSBA to update/rewrite school policies to ensure that Eagle complies with all required policies.

Eagle has an active, involved Parent Club that managed to survive and thrive even through the COVID lockdown. Throughout the 2020-2021 school year, the Eagle Parent Club met regularly on Zoom, hosted Zoom play dates and schoolwide activities, and had a monthly fundraiser. In the years after the COVID lockdown, the Parent Club has continued to develop and thrive. They are partnering now with fifth grade and our counselors' Peer Helpers program on fundraisers and other ways to support the school community.

Eagle Charter School has a stable staff that stays with the school year after year. We do not anticipate any staff turnover for the year. Currently, Eagle operates a school with two administrators, two office staff, two counselors (one part-time, one full-time), 13 teachers (ranging from several hours a week to full-time), and five instructional aides (part- and full-time). Eagle partners with Salem-Keizer Public Schools for special education staff (included in our total numbers). This amount of staffing allows Eagle to operate more efficiently and effectively than it has in the past, support the increased needs of students in the post-COVID-19 era, and develop a reputation as a school where students with special needs can thrive. Eagle has been able to attract staff, particularly licensed staff, by offering salaries that are more competitive than many charter schools. All of our teaching staff hold teaching licenses through TSPC and are highly qualified to work with students. While there is not adequate school funding in Oregon, the Eagle School Board has worked hard over the years to ensure that there is a sufficient "rainy day" fund to continue operations even after the end of ESSER funding in 2024. An expansion to sixth grade would be budget neutral with at least 15 students in the class and provide a slight budget surplus if the class were larger.

Facilities plan

Eagle plans to remain at the Oregon School of the Deaf. We have a good working relationship with our OSD partners and they are good landlords. We would like to work together toward an agreement to expand our school size. At this point, OSD is reviewing its facilities to see where there is space for an additional classroom; we have a possibility but it is not yet confirmed. We are looking at an additional room in our current building.

Budget impact
15 students x $9200 (ADM) = $138,000
(Up to 25 x $9200 = $230,000)
Additional considerations:

- Increased PE FTE (30 min/day) and increased access to a gym. We are currently exploring possible partnerships with another school on campus.
- Increased Music FTE (30 min/week)
- Additional technology (Chromebooks for students, iPad, Apple TV device, TV, and Macbook for the teacher). *If approved before the end of June 2024, we would use the remainder of our ESSER III funds to update elementary technology and shift current fifth grade tech to the sixth grade class.*
- Increased custodial costs ($400/month)
- Increased monthly lease (unknown amount - contract through DAS)
- Teacher cost (approximately $100k/year for salary + benefits)
- Tables, chairs, teacher desk, and classroom furniture (TBD)

Eagle Student Demographic Information - Year over Year Comparison

	2019-2020	2021-2022	2023-2024
Enrollment	144	135	152
Race/Ethnicity*			
White	62%	71%	66.4%
Hispanic/Latinx	21%	12%	13%
Black/African American	8%	10%	3%
Asian	3%	3%	2%
American Indian/Alaskan Native	3%	<1%	2%
Hawaiian/Pacific Islander	3%	<3%	0%
Multiracial	*	*	13.8%
Languages Spoken	English, Spanish, Russian, German, Telugu, Vietnamese, Hawaiian	English, Spanish, Russian, German, Ukrainian, Telugu, Vietnamese, ASL, Hawaiian, French	English, Spanish, Russian, German, Ukrainian, Tagrina, Vietnamese, ASL, French
Gender			
Male	49.3%	49.6%	49%
Female	50%	50.4%	50.5%
Nonbinary	<1%	0	<1%
Economically disadvantaged	43%	56.5%	****%
Special Education	19%	22.5%	21.5%***
EL	NA	10%	6.5%
TAG	0%	<1%	0%

**ODE only counts students in one category, so while a student may personally identify as a member of a particular group, they may not necessarily be counted in that group by the state (example: a student who identifies as Pacific Islander but is listed as Multiracial by the state). Eagle's demographic information for 2019-2020 is based on how parents self-identified.*

***Eagle staff delivered weekly food boxes to 24% of the Eagle student body through December 2020.*

****This does not include students who are currently in the eligibility process.*

*****Eagle offers free school breakfast and lunch to all students in 2023-2024.*

Eagle Staff Demographic Information

	2019-2020	2021-2022	2023-2024
Number of Staff*	20	21	24
Total FTE	14.5	15.5	18
Licensed Staff	13	14	15
Classified Staff	6	6	7
Administration	1	1	2
Race/Ethnicity			
White	18	18	18
Hispanic/Latinx	1	1	1
Black/African American	0	0	0
Asian	0	0	0
American Indian/Alaskan Native	1	2	2
Hawaiian/Pacific Islander	0	0	0
Multiracial	0	0	0
Languages Spoken	English, Spanish	English, Spanish	English, Spanish
Gender			
Male	5	5	5
Female	15	16	19
Nonbinary	0	0	0

*Special education staff provided by Salem-Keizer through an MOU with Eagle Charter. The number of staff is calculated in February of each school year.

Eagle School Board Demographic Information

	2019-2020	2021-2022	2023-2024
Number of Board Members	5 Shannon, William, Rob, Crystal, Bill	6 Shannon, William, Rob, Jason, Bill, Crystal	5 Shannon, Rob, Kyla, Nancy, Luis
Race/Ethnicity			
White	4	4	3

Hispanic/Latinx	0	0	1
Black/African American	0	0	0
Asian	0	1	1
American Indian/Alaskan Native	1	1	0
Hawaiian/Pacific Islander	0	0	0
Multiracial	0	0	0
Languages Spoken	English	English	English, Spanish
Gender			
Male	3	4	2
Female	2	2	3
Nonbinary	0	0	0

Sixth Grade Expansion Request

Eagle Charter School

Salem, Oregon

Eagle Charter School

K-5 State-Sponsored Charter School in Salem

Focus: MicroSociety

Enrollment: 150

Stable leadership and staff, committed families.

Dedicated Parent Club.

Two school counselors to support student, caregiver, and staff mental health.

High-quality education that includes daily PE, weekly music and library, and regular art instruction, in addition to MicroSociety classes.



Additional learning opportunities, including weekly electives (such as coding and financial literacy), Oregon Battle of the Books teams, Yarn Club, ukulele classes, soccer team, Peer Helpers (student leadership).

Improvement and Success at Eagle

Eagle Growth Over Time (OSAS Scores), as reported on the School Report Card & At-A-Glance Profile

Subject	2016-2017	2017-2018	2018-2019	2020-2021	2021-2022	2022-2023
ELA	39	55	43	COVID	46	64
Math	29	24	34	COVID	39	47
Science	*	*	*	COVID	15	36

Success at Eagle

Eagle Comparison to Other Schools & Local District, 2022-2023 (as reported on At-A-Glance Profiles)

School Name	Percentage of Regular Attenders	Percentage of Students with Disabilities	Percentage of Ever Language Learners	Percentage of Free/Reduced Lunch	Percentage passing ELA OSAS	Percentage passing Math OSAS
Eagle Charter	74	14	*	>95	64	47
Highland (neighborhood school)	48	19	30	>95	19	14
Salem-Keizer	52	18	34	>95	31.2	23.1
Ivy (SSCS)	74	22	*	35	59	33
Cottonwood (SSCS)	70	22	*	27	65	36

Identified Need

Limited options in the Salem-Keizer area:

- Howard Street – enrolls approximately 68 6th graders, over 75 on the waitlist
- JGEMS – enrolls approximately 38 6th graders, over 80 on the waitlist
- Roberts Middle School - only takes 7th and 8th graders
- Neighborhood middle schools range from 650-850 students

Some students may benefit from an additional year in an elementary setting, rather than a large neighborhood middle school. Students thrive in a small setting that supports academics, social-emotional learning, and mental health. At Eagle, every staff member knows every student.

Rationale - Why add 6th grade?

Benefits

- Small School Environment
  - Improved SEL & Mental Health
  - Leadership Opportunities
- Attendance
- Academic Excellence
- Diversity & Inclusion



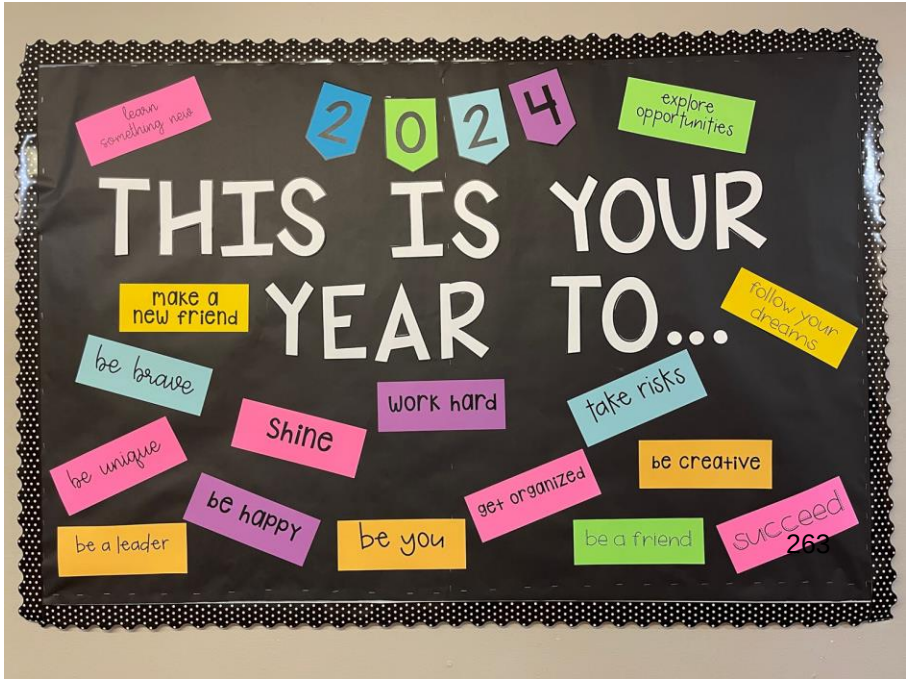
Logistics

- Elementary K-6
- Continuation of MicroSociety
- Same core curriculum through 6th grade
- Space for classroom expansion
- Easily increase part-time staff FTE to support additional class (PE, music, etc.)



FAQs

- What are the financial implications?
- What if you don’t have enough students to start a class?
- Is this sustainable?
- Where will Eagle find a teacher?
- How will Eagle support special education students in sixth grade?
- Will Eagle accept student transfers to sixth grade?
- What will the transition plan look like for seventh grade?
- Will you ever offer 7th/8th grade?




EAGLE

Oregon State Board of Education
June 13, 2024

AGENDA ITEM:

SUBJECT: Eagle Charter School Expansion (State Board Sponsored) **STAFF NAME & OFFICE**: Kate Pattison, Director of School Choice, Options, and Recovery Education in the Director's Office; Marie Ballance, Eagle Charter School Eagle Charter School is requesting to expand the grades served from K-5 to K-6 beginning in the 2024-25 school year.	☐ **First Reading** ☐ **Presentation** ☐ **No Presentation** ☒ **Action** ☐ **Temp Rule** ☐ **Presentation** ☒ **No Presentation**

BACKGROUND

Eagle Charter School (Eagle) is one of four Oregon State Board of Education (Board) sponsored charter schools and is located in the Salem-Keizer School District (SKSD). Approved for sponsorship in December 2010, Eagle opened in September 2011. The school is currently in its 13th year of operation serving about 150 students in grades K-5, using the Microsociety model. Students create and operate businesses, produce goods, manage inventory, sell products to other students, and adjust production to meet customer demand. In recent years, the model has focused on jobs and non-profit organizations in the community. Students have organized events and fundraisers for these partner organizations. In the Eagle Microsociety of Eagleton, students put academic learning into action, preparing them for life in the 'real world'.

The Department, on behalf of the Board, received a request from Eagle to expand their academic program to serve students in 6th grade. The goal is to extend the small school option for students who need an alternative to the larger middle schools in SKSD. Many of Eagle's 5th grade students apply to attend the smaller middle school charter schools in SKSD or families choose to homeschool students. Eagle will operate the proposed 6th grade classroom as a self-contained elementary classroom capped at 25 students. The anticipated average class size is 15 students.

Eagle's expansion request is driven by family and student demand. The school has been receiving requests and feedback from their school community to expand to extend through grade 8. At this time, the Department does not support an expansion for Eagle to operate a middle school configuration. However, K-6 elementary schools are common and do not have the same dynamics and challenges as schools with 6-8.

Over the last three years, Eagle has made significant improvements with their academic, operational, and financial performance. The school has solidified systems, procedures, and school-wide culture that supports student learning and teacher effectiveness. Teacher retention has been high and the school has invested in student interventions, tutoring, and summer school.

Academic Performance:

Eagle outperformed SKSD in 2022-23 in academic achievement where data was available for English Language Arts and Mathematics. The achievement indicator displays the percentage of students meeting the academic achievement standard for each student group. '*' means data was hidden to protect student confidentiality.

Table 1. Academic Achievement Details – District Comparison

2022-23	ELA		Math	
	Eagle	SKSD	Eagle	SKSD
All students	**64.3**	31.2	**47.1**	23.1
Economically Disadvantaged	**64.3**	31.2	**47.1**	23.1
English Learners	**31.3**	12.6	*	9.8
Students with Disabilities	**31.3**	16.4	**18.8**	12.8
Hispanic/Latino	**80.0**	19.5	**60.0**	13.2
Underserved Race/Ethnicity	**71.4**	19.5	**50.0**	13.0
White	**63.8**	43.9	**53.2**	33.7

Between 2018-19 and 2022-23, Eagle made significant improvements in its academic program. This growth can be observed in the average gap score change. The average gap score change indicator uses the difference between a student's score and the cut score for the assessment, called a gap score. This table displays the change in average from 2018-19 and 2022-23. '*' means data was hidden to protect student confidentiality.

Table 2. Average Gap Score Change Details – District Comparison

18-19 to 22-23	ELA		Math	
	Eagle	SKSD	Eagle	SKSD
All students	**42**	-26	**31**	-31
Economically Disadvantaged	**66**	-4	**61**	-12
English Learners	*	-35	*	-38
Students with Disabilities	**13**	-23	**45**	-23
Hispanic/Latino	*	-25	*	-31
Underserved Race/Ethnicity	*	-25	*	-31
White	**50**	-22	**40**	-26

Expansion Plan:

Eagle has developed a plan to add 6th grade that includes facilities, staffing, materials, and student supports. Since the school submitted their request, Eagle has worked with the Oregon School for the Deaf (OSD) to identify an additional classroom. To adequately fund the new classroom, the school needs 12 students to enroll. If they cannot secure the minimum number of students, the school will postpone for one year and begin offering 6th grade in 2025-26. The school has already notified families of the expansion possibility and is preparing to open applications for students who want to continue through grade six. At this time, Eagle will not open applications to transfer students to ensure stability in the academic program.

More detail can be found in the Eagle Expansion Request attachment.

SUMMARY OF PREVIOUS BOARD ACTION

The Board previously considered this expansion request for Eagle Charter School at the May 2024 meeting. The school opened with grades K-5 and has continued operating these grades since 2011. In 2022, the Board approved the renewal of the charter and Eagle's current charter term ends June 30, 2027.

POLICY ISSUE OR CONCERNS

The Department has identified three focus areas for Eagle if this expansion is approved.

1. **Transition from 6th grade at Eagle to 7th grade at local middle schools:**
   Eagle will need to have a strong transition plan in place for students who continue through grade six at the school. Local middle school options in SKSD begin at grade six and have designed their transition programs to support entering 6th grade students. Eagle will need to individualize a plan for each student and build the supports for each 6th grade class to prepare for middle school.

2. **Facilities and programmatic planning:**
   Eagle has identified a new classroom that will support the school's expansion to include 6th grade. This will need to be incorporated into the lease and any additional facilities use agreements with OSD will need to be expanded.

3. **Special education and academic supports:**
   Eagle receives special education related services from SKSD. Currently, SKSD provides professional support and development to their special education staff by school configurations, which are K-5 schools and 6-8 schools across the district. An expansion to include grade six will require Eagle and SKSD to coordinate well to ensure students with disabilities who continue through grade six are appropriately supported. Currently, Eagle pays SKSD for an additional 0.5 FTE to allow the special education teacher to stay full time at Eagle. This provides students and general education teachers with a high level of support for special education and interventions

for students who need more support. Eagle will need to plan for maintaining the right level of support at the school with the expansion.

Salem-Keizer School District

On May 6, 2024, Department staff met with Salem-Keizer School District leadership regarding Eagle Charter School's expansion request. We discussed the school's relationship with the district and student performance. In recent years, Salem-Keizer School District has not had concerns about Eagle Charter School. Most of the district's relationship to the school has centered on special education and pass through funding, including State School Funds, ESSER, and SIA dollars. The charter school has been responsive to requests and special education responsibilities. When considering the expansion, SKSD identified the same focus areas mentioned above. The primary focus is transition planning for students who stay at Eagle for 6th grade and then transition to a larger middle school. The second focus area being how to ensure special education staff assigned to the elementary school are equipped to support the 6th grade students as well. The district did not identify or name any concerns that serve as a reason not to approve the expansion request.

EQUITY IMPACT ANALYSIS

Eagle Charter School is located on the Oregon School for the Deaf campus in North East Salem. The school serves about 150 students in grades K-5 and has been in operation since 2011. It serves students using a microsociety program model and is a school of choice for Salem-area students seeking an alternative to other public or private schools in the area. While Eagle Charter School demographics do not mirror the make-up of the community in which it is located or the district as a whole, the school has made improvements to be more accessible and attract more diverse students. Currently, Eagle is providing school-wide breakfast and lunch to students. Students and families have access to counseling supports through the school. There is a robust and stable before and after school care program. An ongoing barrier to access continue to be the lack of access to transportation services for the school.

Table 3. Student Demographics at Eagle Charter School Over Time (Fall Membership Reports)

Year	2019-2020	2020-21	2021-2022	2022-2023	2023-2024
Enrollment	144	139	131	143	152
Race/Ethnicity					
White	68.1%	64%	64.9%	65.7%	64.5%
Hispanic/Latino	18.8%	21.6%	16.8%	17.5%	18.4%
Black/African American	2.1%	1.4%	3.8%	3.5%	5.3%
Asian	1.4%	1.4%	0.8%	1.4%	1.3%
American Indian /Alaskan Native	0%	0%	1.5%	1.4%	0.7%
Hawaiian/Pacific Islander	0%	0%	0%	0%	0%
Multiracial	9.7%	11.5%	12.2%	10.5%	9.9%

Oregon State Board of Education
June 13, 2024

AGENDA ITEM:

Additional detail on student makeup can be observed in the Eagle Demographic Information Comparison 2023 compiled by the school.

At the May 2024 meeting, board members requested Eagle to respond to ongoing efforts by the school to diversify student, staff, and board member demographics. The school updated their Diversity Plan and have included it with the attachments for this request.

FISCAL ANALYSIS

The Department receives 5% of the funding generated by Eagle Charter School to provide oversight for the State Board sponsored charter schools and support to public charter schools across the state. If Eagle expands to serve 6th grade and 12-25 additional students, this may equate to about $6,350 to $13,250 in revenue to the Department annually.

EFFECT OF A "YES" OR "NO" VOTE

"Yes" = Eagle Charter School will be allowed to expand the grades served from K-5 to K-6. The Department will initiate a contract amendment to allow the school to offer grades K-6 beginning in the 2024-25 school year.

"No" = Eagle Charter School will continue serving grades K-5.

STAFF RECOMMENDATION

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

ATTACHMENTS

Attachment 1: Eagle Charter School Expansion Request
Attachment 2: Eagle Charter School Demographic Information Comparison 2023
Attachment 3: Eagle Charter School At-A-Glance Profile 2022-23
Attachment 4: Salem-Keizer School District At-A-Glance Profile 2022-23
Attachment 5: Eagle Charter School Diversity Plan 2024

Oregon State Board of Education
June 13, 2024

AGENDA ITEMs: 4.K., 4.L., and 4.M.

SUBJECT: Supplemental Plan Revision for Eugene SD, Bend-La Pine SD, & Ontario SD **STAFF NAME & OFFICE**: Brock Dittus, Pupil Transportation & Fingerprinting The districts have submitted a new supplemental plan for board approval. This will change the areas in which transportation will be provided / required for students who live within the statutory minimum for transportation.	☐ **Informational Presentation** ☒ **Written Report**

BACKGROUND

In 1991 the Oregon Legislature added a requirement, and funding, to provide transportation to school students who live a certain distance from their elementary or secondary school. The distances established coincide to the previous limit at which students were required to attend school prior to Oregon's Compulsory School Law.

The legislature also recognized that students who live closer than these prescribed limits may also require transportation due to health or safety reasons, so ORS 327.043 allows for a "supplemental plan" that must be approved by the State Board of Education.

Other than the legislative guidance that the transportation must be for "health or safety" reasons, the State Board has traditionally allowed local school districts to determine areas within their district that require transportation within the distance limits.

In 1992, many districts submitted supplemental plans for approval from the State Board, and all were adopted. Having an approved supplemental plan does two things:

1. It allows a school district to be reimbursed as part of the transportation grant of the state school fund; and
2. It requires transportation to be provided by the district. In other words, the district can't stop providing this transportation without the approval of a new plan.

The State Board does have the discretion to approve or not approve supplemental plans. The Pupil Transportation Unit does ensure that plans presented to the board present a health or safety reason for the plan.

A supplemental plan must be approved by the local school board prior to presentation to the State Board for approval. The District Boards approved these supplemental plans at their regular meetings and submitted the plan to ODE for approval thereafter.

The supplemental plan submitted by these school districts account for attendance boundary changes within the walk distance areas. Proponents and opponents of the submitted plan had the opportunity to be heard at the local level. These plans replace or supplement the previous plans.

Oregon State Board of Education
June 13, 2024

AGENDA ITEMs: 4.K., 4.L., and 4.M.

SUMMARY OF PREVIOUS BOARD ACTION

The State Board approved Eugene School District's original supplemental plan in 1992, with revisions in 1994, 1997, 2004, and 2005.

The State Board approved Bend-La Pine School District's original supplemental plan in 1992, with revisions in 1999, 2001, 2003, 2005, 2010, 2015, 2016, and 2019.

The State Board aproved Ontario School District's original supplemental plan in 1992, with revisions in 2004, 2005, and 2006.

POLICY ISSUE OR CONCERNS

The School Districts submitted a supplemental plan for State Board approval after the local school boards adopted them during sessions open to the public. ODE does not engage with stakeholders regarding these plan revisions separate from the district's public process.

In this case, the districts are updating their plans to account for students who would otherwise be required to walk in dangerous conditions due to speed and/or volume of vehicle traffic, width and condition of street, lack of shoulders or sidewalks suitable to walking, poor visibility, and dangerous crossings or intersections, among other hazards.

EQUITY IMPACT ANALYSIS

ODE does not conduct a separate analysis of a supplemental plan adopted by a local school board except to verify that the supplemental plan is being submitted for health or safety reasons as required by statute.

FISCAL ANALYSIS

There is no fiscal analysis because supplemental plans do not usually have a significant impact on agency funds. There is no requirement for ODE to act as a result of this action. There may be a very small change in impact to the State School Fund Transportation Grant as a result of providing this transportation; however, in most cases the buses / routes that will be transporting these students will pick them up on their way in from other mandated transportation areas around the district.

Adoption of these plans will not have an effect on any other school district, and will allow the districts to be reimbursed at their current rate for the transportation of these students as part of their transportation grant.

ATTACHMENTS

Attachment 1: Eugene SD Supplemental Plan
Attachment 2: Eugene SD board minutes indicating local approval
Attachment 3: 2024 Bend La Pine Supplemental Plan Update

Oregon State Board of Education
June 13, 2024
AGENDA ITEMs: 4.K., 4.L., and 4.M.

Attachment 4: 2024 Bend La Pine Board Approval
Attachment 5: Ontario SD Supplemental Plan
Attachment 6: Ontario SD School Board Approval (Meeting Minutes)

MINUTES OF REGULAR BOARD MEETING

SCHOOL DISTRICT 4J, LANE COUNTY, OREGON

Date: April 17, 2024

The Board of Directors (BOD) of School District No. 4J, Lane County, Eugene, Oregon, held a regular board meeting at 7:00 p.m. in-person at the Education Center, 200 North Monroe Street in Eugene, Oregon, via live-stream and broadcast on KRVM. Notice of the meeting was emailed to the media and posted on the 4J website on April 12, 2024.

ROLL CALL

BOARD MEMBERS PRESENT:
Chair Maya Rabasa
Vice Chair Jenny Jonak
Judy Newman
Ericka Thessen
Tom Di Liberto
Morgan Munro
Rick Hamilton

STAFF:
Colt Gill, Interim Superintendent
Jill Cuadros, Director of Nutrition Services
Ryan Spain, Director of Facilities Management
Brooke Wagner, Director of Human Resources
Steve Menachemson, Director of Technology
Kee Zublin, South Eugene High School Principal
Jason Floyd, Regional Equity Manager
Jen Hebard, Chinese Immersion Principal
Melissa Ibarra, Director of Dual Languages
Sherry Moore, Executive Assistant to the Chief of Staff
Debbie McKim, Executive Assistant to the Interim Superintendent and Board

OTHER GUESTS:
Parker Anderson, North Eugene High School
Sheridan Schilling, Churchill High School (online)
Nancy Buffum, Director of Eugene Education Foundation (EEF)

EMPLOYEE ASSOCIATIONS:
Sabrina Gordon, President of Eugene Education Association (EEA)
Lisa Jenkins-Easton, President of Oregon School Employees Association (OSEA)

DRAFT

MEDIA:
KRVM
Register Guard

I. REGULAR BOARD MEETING

II. CALL TO ORDER, ROLL CALL, FLAG SALUTE, LAND ACKNOWLEDGEMENT

Chair Maya Rabasa called the regular board meeting to order at 7:06 p.m. She said the names of the board members who were present. Interim Superintendent Colt Gill led the flag salute, and Chair Rabasa read the land acknowledgement statement.

III. AGENDA APPROVAL

IV. INTRODUCTION OF GUESTS AND SUPERINTENDENT'S REPORT

Interim Superintendent Colt Gill provided a report. In his first days serving as Interim Superintendent, he has spent time in meetings with district staff, deepening his understanding of the district's financial health, learning the communication and coordination systems, academic programs, initiatives, and more. Interim Superintendent Gill reported visiting Edgewood Elementary and Monroe Middle School.

He added that the board of directors (BOD) held a work session on April 17 discussing the state of the district's mental health programs. He was impressed with the depth of the programs and the professionalism and dedication of the staff.

He mentioned the Coalition of School Administrators (COSA) Mental Health Summit at The Graduate in Eugene on April 19.

V. RECEIVE REPORTS FROM HIGH SCHOOL REPRESENTATIVES

North Eugene High School representative Parker Anderson provided a report. He stated that their attendance rate is 87%, the same it was at the end of semester one. This represents a 30% in attendance from last school year. Graduation rates are higher. 89% of ninth grade students are on track to graduate their senior year. 84% of seniors are on track to graduate. The theatre is debuting their spring musical Into The Woods mid-May. Prom happens in May. Spring sports are all underway.

Churchill High School representative Sheridan Shilling provided a report via Zoom. The annual Lancer Pageant Children's Miracle Network Fundraiser is on April 19. Track and tennis are underway. Churchill thespians are opening Mean Girls on May 9. Prom is at the Ford Alumni Center on May 4. Churchill students forecasted for next year and discussed zero periods. All zero periods except band ended at the beginning of the 2023-24 school year. She said students are reflecting on the fact that it was considered inequitable to hold zero periods for classes such as leadership. Yet leadership is responsible for coordinating dances, assemblies, and many other activities. This year,

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leadership is first period. The problem with this is its equity and inaccessibility of students. Leadership used to have 40 participants, now there are 10. One conflict is that AP Government is only first period. Meeting during first period is almost more inequitable than meeting during zero period. She pointed out that band is allowed as a zero period, but other classes are denied. She urged the board to consider this. Ms. Sherriden said fights are happening more frequently. She referenced a fight on April 16 amongst five students, stating that students have reported feeling a serious shift from last school year to this one.

Ms. Newman provided a report on behalf of Sheldon High School representative Carmen Valle Gonzalez. She stated that last week eight graders from Cal Young and Monroe Middle Schools were given tours by Sheldon students. Mama Mia is opening April 26. Wind ensemble and varsity choir both qualified for state. The golf team had its third competition, which they won. The lacrosse team has a game on April 19. The Asian Student Union had a conference. Prom is April 20. She added that as the school year comes to an end, students are questioning if there will be any change to C days next year.

VI. ITEMS RAISED BY THE AUDIENCE

Kelly Briggs, Food Service Coordinator at Edgewood Elementary School, asked the board for help getting a classification upgrade for Food Service Coordinators. She said other coordinator positions at a higher grade have the same responsibilities. Food Service Coordinator jobs are directly related to the health of the students. They are responsible for the food served to the students, including allergies and nutritional requirements. They are sometimes required to be in the cafeteria with the kids unsupervised. She said their eight-hour position was reduced to seven hours, but they still have to accomplish the same tasks. She reported that Food Service Coordinators have tried to initiate a conversation with the district. She asked the board to encourage the district to respond to the issue.

Jocelyn Stimac, Edgewood Elementary School parent, brought two topics to the board. First, she expressed her concern about Edgewood Elementary School. She said the magic of Edgewood Elementary School is being threatened due to a lack of support for teachers, special education (SPED) students, and families. Secondly, she asked if the board understands how Title I funding is assessed and allocated within the district now that the community eligibility provision is in place. She said she has been asking that question to the district but to no avail. She urged that it be made clear district wide.

Alia Nickel urged more support and assistance for students at Edgewood Elementary School. She said there are students communicating on a daily basis that their needs aren't being met. She said this year has felt different than past years. She cited poor communication and said there were promises made that have not been fulfilled. She explained that the reason her and other teachers are speaking out, is because it is the last

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regular school board meeting before expo ends, where teachers can request to be transferred to another school. She said that many Edgewood Elementary School teachers have put in for expo already. She added that Edgewood Elementary School qualifies for Title I funding. She provided some data illustrating community need. She said Edgewood Elementary School is losing out on critical funding because families are not completing the forms for free or reduced lunch due to the community eligibility provision. She said if Edgewood Elementary School had Title I funding then they would be able to have smaller class sizes, more staffing, an assistant principal, a larger library, and a chance to grow. She urged the BOD to listen to union representatives. She provided hardcopy statements collected from numerous community members.

Rachel Stroh, Edgewood Elementary School parent, expressed that there has been a dramatic shift in morale at the school because the professional knowledge of their dedicated staff is being dismissed. She cited staffing shortages impacting teachers and trickling down to students. She said teachers have earned the right to be trusted, listened to, and supported.

Jayme Sloan, Edgewood Elementary School parent, informed the board that this year her son has had anxiety at school. She said he has benefited from supportive teachers and staff, yet he is still often overstimulated in the school environment and does not always have a quiet space to be. She said the school climate has changed significantly this year. Teachers and support staff are spread thin and working beyond their means to keep children safe at school leaving the day-to-day tasks and student learning to suffer. There are frequently unfilled teacher absences. She urged for more support staff at Edgewood Elementary School.

Larry Lewin (online), retired 4J educator and Community Alliance for Public Education (CAPE) member raised concern about district staff turnover. He continues to be concerned that the district is losing teachers, EAs, administrators, and support staff at a dangerous rate. He said the entire country is facing educational burnout. He cited a recent New York Times article, “Employees are also putting more focus on their own mental health. That is especially relevant for teachers who have faced increased demands and political pressures over the last years while being paid less than similarly educated professionals and having less flexibility to work remotely.” Mr. Lewin urged the 4J Human Resources Department to gather data on staff attrition. He urged the district to figure out the specific causes and provide analysis to find a solution.

Harry Sanger (online) referenced the April 3 BOD meeting and the topic of a recent event at Spencer Butte Middle School. He shared his opinion that the district’s initial response was correct, stating that keeping a controversial cause out of the classroom is a commonsense approach. He said he finds it abhorrent that the ideal of inclusion would allow for an identity group to exist in a public school that could foster an unsafe

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learning environment for Jewish 4J students. He asserted that teachers standing in a privileged position of authority should not be using symbols (i.e. flags) to promote their individual identities or politics in an inclusive learning environment.

Kara Mayer, Nutrition Services Coordinator at Spencer Butte Middle School, urged the district to engage in a conversation about job reclassification for Nutrition Services Coordinators. She said the starting wage was raised to eighteen dollars per hour, which is wonderful. But now the wage gap is compressed for supervisors, etc. She said when she first got hired as Coordinator it was a coveted position. Now, few want to take on the responsibility for the pay. She urged the district to negotiate.

Katie Jacobson, Edgewood Elementary School parent, expressed that at Edgewood Elementary School they are still struggling to fill vacancies. A former substitute teacher, Ms. Jacobson said substitutes will not fill in at a school with a reputation. She is concerned that the reputation at Edgewood Elementary School has changed in a short amount of time. She said teachers and support staff are often stretched thin managing unfilled vacancies. Although school climate and culture are at a low, she sees a strong community. She urged the district to reveal how Title I funding is determined, and to provide transparency and assistance with the process.

VII. COMMENTS BY EMPLOYEE GROUPS

Lisa Jenkins-Easton, Oregon School Employees Association (OSEA) President, voiced her concern about challenge of paying the coordinators a better wage and getting them back to 8 hours. She urged the BOD to look more closely at if they are missing out on Title I funds by not following some guidelines. She expressed frustration on behalf of OSEA. They bring questions to meetings with the district and want dignified, real answers. She pointed out that it has been several months since the bus drivers came and spoke. Now, it is Nutrition Services. She doesn't understand why it takes so long to meet critical need when it is brought to the district. Ms. Jenkins-Easton brought attention to current classified staff displacements (an estimated 45). She said the district is in a special education crisis, and she is shocked to see any movement of educational assistants (EAs). She worries about losing the employees altogether.

VIII. COMMENTS AND COMMITTEE REPORTS BY INDIVIDUAL BOARD MEMBERS

Ms. Newman provided recent highlights. She attended the Eugene Education Foundation (EEF) gala, visited a pilot developmental kindergarten, Sheldon High School's Leadership class, and a long-range Facilities Advisory and Bond Oversight Committee meeting. She said that in 2019, the district passed the largest bond ever. At the end of this school year the district will have spent 74% of the bond funds; and are within budget, and within timeline. She acknowledged the team and Eugene taxpayers. Ms. Newman mentioned Advancement Via Individual Determination (AVID), a program that will

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gradually become schoolwide. She announced that there are still openings for the April 19 Mental Health Summit. Registration is on the Coalition of School Administrators (COSA) website.

Mr. Di Liberto shared comments in reference to Edgewood Elementary School, stating that it is concerning to him. He has been monitoring the attention staff have been giving and will continue to do so. It is important to him that [Edgewood] gets the help it needs. Mr. Di Liberto visited that Latinx Student Union at Sheldon High School, two community circles at district middle schools, and a Facilities Advisory and Bond Oversight Committee meeting.

Ms. Thessen highlighted Occupational Therapy Month in April. She attended a Churchill v North unified basketball game and visited the Chinese Immersion School, describing it as an incredible and growing program. Ms. Thessen brought attention to mental health, sharing statistics that 82% of children are being seen for anxiety, 60% for depression, and 15% for suicidal thoughts. She strongly advocated for more school-based health centers.

Ms. Munro went on a ride along with the Transportation Department and she better understands the complexities of getting students to and from school. She congratulated Network Charter School's culinary art students for a successful Chef's Night Out, adding that they won the People's Choice Award.

Vice Chair Jonak thanked public commenters, stating that she cannot imagine anything more important than ensuring students are feeling safe and in an appropriate learning environment.

Mr. Hamilton offered that he is humbled to be in front of [public commenters] and hoping somehow to help resolve the issues.

Chair Rabasa reflected on public comment, stating that the wellbeing of students has a symbiotic relationship with the wellbeing of staff. She announced that, after the BOD directed them to do so two years ago, the district is bringing back Certified Teacher Librarians. Next school year, every elementary school in the district will have one. She urged that the district does not displace classified staff, but rather each library should have a Library Assistant. She highlighted School Library Month in April.

IX. CONSENT GROUP – ITEMS FOR ACTION

1. APPROVE SPECIAL BOARD MEETING MINUTES FOR MARCH 20, 2024 AND MARCH 22, 2024

2. APPROVE MIDDLE SCHOOL ENGLISH LANGUAGE ARTS (ELA) INSTRUCTIONAL MATERIALS ADOPTION

3. APPROVE TRANSPORTATION SUPPLEMENTAL BUSING PLAN

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4. APPROVE BOND PROJECT – EQUITY, ACCESS, AND HEALTH

5. APPROVE BOND PROJECT – CHURCHILL HIGH SCHOOL ROOFING

6. APPROVE BOND PROJECT – YUJIN GAKUEN ELEMENTARY SCHOOL FURNITURE

7. APPROVE TRANSPORATION BUS WASH INFRASTRUCTURE

MOTION: Vice Chair Jonak moved to approve the Consent Group. Mr. Di Liberto seconded. **The motion carried unanimously, 7:0:0; Chair Rabasa, Vice Chair Jonak, Ms. Thessen, Ms. Newman, Mr. Di Liberto, Ms. Munro, and Mr. Hamilton all in favor.**

X. ITEM FOR INFORMATION

1. RECEIVE PRESENTATION OF STUDENT CONTINUOUS IMPROVEMENT PLAN FOR SOUTH EUGENE HIGH SCHOOL

Presenter: Kee Zublin, South Eugene High School Principal and Jason Floyd, Regional Equity Manager

Mr. Zublin and Mr. Floyd presented the South Eugene High School Student Continuous Improvement Plan (SCIP) via PowerPoint presentation.

Mr. Zublin provided a SCIP overview. The focal group is made of up to 55 Native American students. Their tribal identification is from all over the Americas. SCIP overarching goals are: 1. On track to graduate. 2. Timely communication. 3. Belonging.

Their continuous improvement process includes: 1. What is working and what needs to change. 2. Establish a process to engage stakeholders. 3. Leverage effective practices to implement a plan. 4. Use data to monitor and make timely adjustments to improve outcomes.

Their measure of goal number one, on track to graduate, include: 1. Grades at semester one. 2. Grades at quarter three. 3. Attendance. Mr. Zublin pointed out that focal group average attendance is slightly *higher* than average attendance (average attendance = 84.9%, focal group attendance = 85.3%). He added that their SCIP goal is 86.1%. Mr. Zublin explained there are data teams to track progress and ensure that students are passing their classes. These include the Student Support Team, 9th Grade Success Team, counselors, and administration. Recent data revealed that fewer students who are native identified are earning As, and more are earning Fs. Mr. Zublin called it a cause for concern and something they are paying close attention to.

Regarding goal number two, timely communication, Mr. Zublin said they have created the Parent Square Native Family Group. Participants receive early access to parent

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conferences. Additionally, they partner with the Natives program to table at various events.

Regarding goal number three, belonging, Mr. Zublin said that the most important place to cultivate student belonging is in the classroom. He said that occurs in Tier 1. They encourage all district classrooms to cultivate belonging for all students, in particular for marginalized students.

Mr. Floyd noted that belonging is paramount. He introduced student interviews. He said the team has been conducting one-on-one interviews to get a firsthand account of student experiences. A quarter of focal group students have been interviewed. On a positive note, data collected so far indicates that the number of trusted adults on campus is seven per student. Those trusted adults are often mental health professionals, club advisors, and coaches. He added that the Native American Student Union (NASU) is a resource celebrating identity and culture and NATIVES programming is frequently provided.

Mr. Zublin introduced NASU's future native garden, which is to be planted in one of the four campus courtyards, near Kids Down South. He stated that they imagined they could increase belonging for students by giving them a piece of land. Mr. Zublin revealed a draft design of the garden, including a dry creek, native vegetation, and a green, biodiverse landscape.

Mr. Zublin described next steps. He said their focus now is on quarter 4 and on-time graduation. They will continue to focus on student belonging, Sources of Strength programming, curriculum and pedagogy that meaningfully reflects deep culture, staff professional develop on inclusive practices, and culturally sustaining pedagogy.

Ms. Thessen asked if there is there a dedicated space at South for neurodiverse students, such as a decompression room.

Mr. Zublin responded that they have the "Chillax Space," the "Amazon Room," and the "Mind Body Alliance," all serving as a hospitable space for neurodivergence students.

Ms. Newman asked if the AVID program is a support for the Native affinity group.

Mr. Zublin responded affirmatively.

Vice Chair Jonak asked what level of participation they are getting with student surveys.

Mr. Floyd commented that no one has turned them down yet. They have received positive feedback from the students. He added that the interviewees reflect the cultures that the kids represent.

Vice Chair Jonak asked what other focal groups they are working with and the extent to which it includes students with disabilities, etc.

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Mr. Zublin responded that, other than the Native American focal group, there are many others in need of similar levels of care and every one of them deserves attention. He said their goal is to center all experiences in planning.

Vice Chair Jonak asked if every year they focus on a different focal group.

Mr. Floyd responded that they focus on the highest needs first, but they are going to get to everyone. He clarified that eventually they will expand and include another identifying group, in addition to the Native American focal group.

Ms. Munro asked what is something they intended to be part of their plan but has changed.

Mr. Zublin responded cultural celebrations. They discovered that hosting cultural celebrations can be hard. It is difficult to regain trust that has been broken. He said people do not always want to come in and provide their input as stakeholders. They are seeking a more authentic way to engage them.

Chair Rabasa asked if they have made the data collected available to staff and educators.

Mr. Zublin replied that it is a good idea they will take into consideration.

XI. ITEMS FOR ACTION

1. MANDARIN MATRIX: K-8 MANDARIN LANGUAGE ARTS CURRICULUM ADOPTION

Presenter: Jen Hebard, Chinese Immersion Principal and Melissa Ibarra, Dual Languages Director

Ms. Hebard introduced the Mandarin Matrix: K-8 Mandarin Language Arts Curriculum Adoption via PowerPoint presentation. The objective is to adopt the curriculum starting in fall 2024. The curriculum is aligned to the American Council on the Teaching of Foreign Languages (ACTFUL). The curriculum is expected to deliver students multiple opportunities in target language foundational skills, provide content learning and comprehension, and support writing and literacy development.

They have been using the Better Chinese curriculum, but teachers are spending a lot of time modifying it, resulting in a lot of time and extra effort on their part. Ms. Hebard provided a slide detailing rationale for adopting Mandarin Matrix.

Mandarin Matrix will create a vertical alignment from grade to grade, better preparing students for advancing their skills in reading, writing, speaking, and listening as they progress through the proficiency standards at all grade levels. The curriculum provides resources for parents to support students at home. The curriculum will monitor and track students' progress and provide informative data that can be used to adjust instruction as needed. She went over some of the negative impacts if the curriculum is not adopted:

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it could potentially impact students' seamless progression of skills across grade levels and impede their overall learning experience and would require teachers to continue modifying the existing curriculum, among other factors.

Ms. Ibarra highlighted the cost of adopting the K-8 Mandarin Matrix curriculum. For a six-year site license, the total cost is $162,500. That includes books, materials, and targeted professional development.

Ms. Thessen asked if there are plans for increasing counselors at Chinese Immersion. She noted that there is a part-time counselor, but most schools have full-time counselors.

Ms. Hebard responded that they are interested in a full-time counselor.

Ms. Thessen asked if Chinese Immersion have affinity groups.

Ms. Hebard responded that middle schoolers have access to affinity groups, such as the Asian Club. Elementary students do not have an affinity group. There has been discussion about starting something up.

Ms. Munro asked if parents have been asking for more support at home, as the new curriculum has the promise of delivering.

Ms. Hebard replied that teachers have observed parents being very engaged in their child's education, and this would provide more opportunity for that. It would also deliver on their SCIP communication goals.

Ms. Newman asked about the source of funding.

Ms. Ibarra responded that the funding source has been identified.

Interim Superintendent Gill added that he recently met with relevant staff and they identified the various funds that will support the adoption of the Mandarin Matrix curriculum.

> **MOTION:** Vice Chair Jonak moved to approve the Mandarin Matrix language arts curriculum. Ms. Newman seconded. **The motion carried unanimously, 7:0:0; Chair Rabasa, Vice Chair Jonak, Ms. Thessen, Ms. Newman, Mr. Di Liberto, Ms. Munro, and Mr. Hamilton all voting in favor.**

2. TWO-YEAR ACADEMIC CALENDAR

Presenter: Interim Superintendent Colt Gill

Interim Superintendent Gill highlighted that they are being asked to approve a two-year academic calendar cycle. Next spring they will have the opportunity to review and decide whether to continue with same model for the 2025-26 school year. He pointed out that the calendar still results in significantly more student contact time than the previous

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calendar. He suggested the calendar does a better job of seeking a balance of educator planning and professional development opportunities.

Vice Chair Jonak asked if there is an easy comparison for total instructional time versus the past year or two.

Interim Superintendent Gill responded that they break out the instructional time per level because there are different requirements at each level. Over the course of the year compared to current year calendar, an elementary school would receive an additional 14 hours of instructional time, middle school would receive eight and a half hours, and high school would receive nine hours.

Vice Chair Jonak suggested that, regarding a possible make up day for Presidents Day, it would be great to put in an automatic shift into that being a makeup day if there's a closure so that families and staff know as soon as possible.

Ms. Munro mentioned that previously there was an optional calendar option from Eugene Education Association (EEA). She asked if they are still submitting an alternate calendar.

EEA President Sabrina Gordon clarified that through conversations with Superintendent Gill, almost everything that was submitted in the alternate calendar is reflected. The only thing that is not reflected is eight hours for grading on mid-semester grading days. Ms. Gordon said they are okay with withdrawing their previously submitted academic calendar.

Oregon School Employees Association (OSEA) President Lisa Jenkins-Easton commented that for their employee group having such short notice was difficult. She requested that if they include President's Day to provide at least two weeks lead.

> **MOTION:** Vice Chair Jonak moved to approve the two-year academic calendar as proposed. Ms. Munro seconded. **The motion carried unanimously, 7:0:0; Chair Rabasa, Vice Chair Jonak, Ms. Thessen, Ms. Newman, Mr. Di Liberto, Ms. Munro, and Mr. Hamilton all voting in favor.**

XII. ITEMS FOR ACTION AT A FUTURE MEETING

1. SELECTION PROCESS TO REVIEW POLICY RELEVANT TO MATERIALS DISPLAYED IN CLASSROOMS

Presenter: Chair Maya Rabasa

Chair Rabasa introduced the selection process to review policy relevant to materials displayed in classrooms. She provided a handout—a synopsis of what was discussed in leadership. She recommended having a small group of board members meet with staff for a preliminary review then bring the materials back to the board with a recommendation. They could either go with their established district work group already tasked with policy or form an ad hoc work group specifically for the purpose of a preliminary review.

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Vice Chair Jonak noted that given the various legal implications, she thinks the work group should have the benefit of legal counsel, preferably with constitutional expertise.

Mr. Di Liberto said he is curious how other districts are dealing with the issue.

Ms. Thessen advocated for gathering insight from community partners and people with lived experience.

There was more discussion about whether to have the existing policy workgroup do the review or an ad hoc workgroup. Chair Rabasa recommended a third option, to do the work collectively and ask district staff to gather relevant policy.

Ms. Munro suggested that the policy workgroup would be well positioned to figure out what should be included in a work session, if scheduled. She said that the policy workgroup has been facing a significant backlog and statutory requirements may preclude them from putting the issue first on the list. Ms. Munro added that writing policy about one thing generally results in bad policy.

Ms. Newman responded that she believes the district has a policy that is not just focused on flags but is more comprehensive. She suggested they start there and build on the work that has been done.

Interim Superintendent Gill agreed that starting with policy makes a lot of sense. And as the work group starts to think about recommendations going, they will want to see how they stand up against other policies to avoid not creating something that is counter to a different policy.

Mr. Di Liberto is in favor of a work session preceded by something in brief form. He does not advise leading with policy review.

Chair Rabasa asked if there are members not on the policy workgroup who want to be part of the review work.

In addition to Chair Rabasa, Ms. Thessen and Mr. Di Liberto indicated interest.

Ms. Newman emphasized the importance of creating a safe space while conducting the review. It is important for individuals like herself who are personally impacted by the issue due to their background.

Mr. Hamilton suggested that as a group they review the policy and know exactly what the policy was established for, what it covers, what it doesn't cover, and suggested they deal with the writing first and foremost. He suggested targeting what the problem is with the policy that created such an uproar.

Ms. Munro proposed that the policy workgroup collect current policy for review. She noted that the workgroups cannot make recommendations.

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Ms. Newman requested that they include information about what community groups provided input informing the current policy.

Chair Rabasa proposed that she and Interim Superintendent Gill put together two proposals to present to the BOD at the next meeting.

There was consensus to bring forward the two suggested proposals at the next meeting.

XIII. SUGGESTIONS BY THE BOARD FOR CONSIDERATION OF ITEMS AT A FUTURE MEETING

Ms. Thessen suggested an update on when the equity committee is meeting and if they've been meeting this year.

Ms. Newman suggested a weekly memorandum about the mechanism for determining requirements for a Title school.

XIV. ADJORN

Chair Rabasa adjourned the regular board meeting at 10:24 p.m.

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Eugene School District 4J

Supplemental Plan

March 2024

Supplemental Plan prepared by:

Arthur Hart, Transportation Director

Jason Wolf, Business Info Systems Analyst

Sarah Mazze, Safe Routes to School Coordinator

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EVALUATION OF WALKING AREAS
& PROPOSED SUPPLEMENTAL PLAN

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Introduction

In accordance with state law, the district is required to provide transportation for elementary students who reside more than one mile from school and for secondary school students who reside more than 1.5 miles from school, also known as the "walk zone." A district is also required to provide transportation for any student within the walk zone where specific health and safety concerns justify providing transportation.[1]

Eugene School District 4J has an Oregon Department of Education approved waiver affecting the transport of high school students who live outside the prescribed walking distance. The waiver requires that Eugene School District 4J provides qualified high school students transport when they reside more than 1.5 miles from an LTD bus stop, and in circumstances where safety may be an issue. Such safety issues would be noted in the supplemental plan.

The state reimburses 70% of the approved cost for 4J transportation. The funding rules require that districts provide a Supplemental Plan to be approved by the State Board of Education in order to receive this reimbursement for students who live closer than the prescribed distances to the school. (See Appendix A for text of OAR 581-023-0040) With the passage of HB 3014 in 2023, Oregon school districts may now be reimbursed for the use of "alternate transportation" for getting students to school if included in a Supplemental Plan and with documentation that the reimbursement requested is equal to or less than the previously allowable costs (Sections 1 of ORS 327.003 and Section 2 of ORS 327.043).

Eugene School District 4J (4J)'s most recent Supplemental Plan was approved by the state in 1992. Since the inception of the 1992 Supplemental Plan, school boundaries have changed and busing due to hazards have increased in some locations and decreased in others. In addition, in some locations, 4J is choosing to use crossing guards rather than busing students in the walk zone because of the

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[1] OAR 327.006 Definitions for State School Fund distributions. As used in ORS 327.006 to 327.133, 327.348 and 327.731: (C) Any student required to be transported for health or safety reasons, according to supplemental plans from districts that have been approved by the state board identifying students who are required to be transported for health or safety reasons, including special education;
https://content.govdelivery.com/accounts/ORED/bulletins/2ef295e#:~:text=ORS%20327.043%20When%20district%20required,than%201.5%20miles%20from%20school.

House Bill 3014: Directs State Board of Education to adopt rules that allow for reimbursement of school district expenses incurred in lieu of transporting students. Prohibits reimbursements that are greater than amount school district would have received if school district had provided transportation. Declares emergency, effective July 1, 2023.
House Bill 3014

challenges of bus driver shortages and for the benefits accrued through cost savings and the emotional benefit that interacting with the caring adults that are the crossing guards will provide for students served by the supplemental plan and other students using those crosswalks. The cost differential for using crossing guards in specific locations is included in the pages that follow in the description of the hazards at those schools.

Based on the hazards described in this document, approximately 727 students will be eligible for district-provided transportation within the walk boundaries due to hazards. The plan does not include sites that house schools that currently do not have transportation boundaries, such as charter and choice schools.

With the goal of addressing equity issues around transportation and attendance, this plan also provides for a pilot providing temporary (up to three months of) Supplemental Busing on a case by case basis, with Director approval. Such busing would provide a means for students to get to school while the district provides support for resolution of circumstances that challenge students' ability to get to and from school by other means. Equity triggers include race, poverty, language barriers/new arrivals, student or family medical problems and general education director placement. At the end of the pilot, the district will review how many students participated and how the process went.

Methodology

A point system, based upon a format used by other districts throughout the state, was developed to allow objective decision making on roadways throughout our district. This system assigns points to the following hazard criteria as outlined below:

1. SAFETY WALKING ALONG ROAD:

This is the area usable for students to walk on for the road in question. The assumption is that scoring for one side of the street only means that there is no facility or usable space on the other side of the street. If the scoring is for a shoulder, that means there is no sidewalk.

- Raised Sidewalk both sides of street - 0 Points
- Raised sidewalk on one side of street - 1 Point
- Street level sidewalk separated from street with planter strip or parking on both sides of street - 2 Points
- Street level sidewalk separated from street with planter strip or parking on one side of street - 3 Points
- In-street, separated facility on both sides of street - 4 Points
- In-street, separated facility on one side of street - 5 Points
- Shoulder greater than three feet on both sides of street- 6 Points
- Shoulder greater than three feet on one side - 7 Points
- Shoulder 1-3 feet wide on both sides of street - 8 Points
- Shoulder 1-3 feet wide on one side of street - 9 Points
- Shoulder restricted by vegetation, ditches and/or culverts, with no available walk space distance walked shorter than 200 feet - 10 Points
- Shoulder restricted by vegetation, ditches and/or culverts, with no available walk space distance walked greater than 200 feet - 15 Points

2. CROSSING SAFETY

It is important that street crossings are *appropriate and effective* given the street classification. Enhanced crossings include striping, traffic signals, rectangular rapid flashing beacons (RRFB), pedestrian islands, etc. and are contingent on the street classification, volume of traffic and road speed. For example, a major arterial could have a traffic light and striping or it could have a RRFB, island and striping. It would be appropriate for a collector to have striping alone, or striping and a pedestrian island.

- Enhanced crossings every intersection - 0 Points
- Enhanced crossings every eighth of a mile - 1 Points
- Enhanced crossings every quarter of a mile - 4 Points

- Enhanced crossings further than every quarter mile - 5 Points
- *** Arterials receive twice as many points as other road classifications - Double the Points**
- *** Remove 3 points for elementary and 5 for middle if there is a traffic signal controlled crossing on the street in question. Exceptions will be where the number of vehicular turning movements through the school crosswalk exceeds 300 per hour while pedestrians are going to or from school, or when there are 4 or more lanes of traffic.**

3. LCOG CRASH DATA:

The LCOG Crash Map is reviewed for bicycle or pedestrian crash history within the street segment under review. A single crash could be an indication of a random act, whereas multiple crashes indicates a more systemic problem in that location.

- One crash receives - 1 Point
- Two crashes receives - 3 Points
- Three crashes receives - 7 Points
- Four or more crashes receives - 10 Points

4. SPEED LIMIT:

Using Google Maps or a site visit, posted speed is documented for the segment under review. School zones are not accounted for here, as they are variably adhered to, particularly depending on the type of signage, whether or not they have lights and the speed differential between the school zone and the posted speed limit for the remainder of the street.

- 20 mph - 0 Points
- 25 mph - 1 Point
- 30 mph - 3 Points
- 35 mph - 5 Points
- 40 and greater mph - 7 Points

5. TYPE OF STREET:

Street classifications are found in this map (also in Appendix B of this report), produced by the City of Eugene. Points vary from 0 to 7. See Appendix B for the road classification map.

Street Classification:

- Major Arterial - 7 Points
- Minor Arterial - 5 Points
- Major Collector- 3 Points
- Neighborhood Collector - 2 Points
- Local - 0 Points

6. ROAD WIDTH, LANES AND PARKING:

Road width is measured as the paved roadway, including bike lanes, shoulders and parking. The number of lanes include travel and continuous dedicated turn lanes in all directions. Bike lanes, cycle tracks and other active transportation facilities are not included in the number of lanes. Points will be awarded as follows:

- Roads without lane markers - 0 Points
- Two lane - 1 Point
- Three lanes - 2 Points
- Four lanes - 3 Points
- Five or more lanes - 4 Points
- *** Add two additional points for width greater than 45 feet.**
- *** On street parking earns one point total for parking on one or both sides of the road, as this impedes visibility.**

7. LIGHTING:

Lack of lighting, or darkness, is a key factor in many severe crashes.

- Streets that lack lighting at intersections or on curves - 3 Points

8. DELAYED EMERGENCY RESPONSE:

Emergency services are likely to arrive at the scene of a crash later in hard to reach areas, potentially impacting outcomes for students involved in a crash. If the score is close, this could be confirmed with police dispatch.

- Harder to reach area with slow response time (according to police dispatch, there are slower response times in SE hills - up Willamette or Donald - Ex: Nectar Way) - 3 Points

9. OTHER CONDITIONS:

The points vary from 1 to 10 with 10 indicating a high risk. This includes specific identifiable items not covered elsewhere on the evaluation, with each item earning one point. For example:

- Lack of school zone or school crossing signs
- Terrain features that impact visibility, like hills and curves
- Unmarked crosswalks across arterials in the walk area
- Secluded or isolated areas
- Heavy commercial traffic in the area
- Non-perpendicular intersections
- Steep grades
- Crossing a waterway
- Crossing train tracks
- Other

Hazard Formula

The hazard threshold is established by adding the median from the hazard criteria, (above) numbers 1 thru 7, to get a score of 27 points, which is used for elementary students to establish a hazard area. For middle and high school students, the hazard threshold is 32 points. (An additional 5 points is allowed for middle and high school students.)

Points from evaluation criteria 8 and 9 are not part of establishing the base for the hazard threshold, as they are more rare, one-off conditions.

See Appendix D for a copy of the worksheet used for the walk zone evaluations or click this link to the Supplemental Busing Evaluation Spreadsheet.

Future Support for Approved Supplemental Plan

The Transportation department recognizes that changes as large as those in this proposal require a significant amount of support following implementation. To support this Supplemental Plan, the Transportation department, in partnership with the 4J Safe Routes to School program, will provide the following for areas losing Supplemental Busing:

1. A letter to send home encouraging families in the Walk Zone to try active transportation like walking or biking and that includes general recommendations on route selection for active transportation and that shares specific local information like locations of marked crossings.

2. Continued communication with the City of Eugene and Lane County to share our priorities for improvements to the Walk Zones surrounding schools. 4J Safe Routes to School has developed a prioritized list of infrastructure needs focused on both the areas where students currently walk and areas that are deemed hazardous. (Link to Safe Routes to School Infrastructure Prioritization tool.)

3. Work with schools to ensure proper training and attire for Crossing Guards and to ensure conformity with the standards outlined in the Oregon Department of Education's Traffic Patrol Manual for Schools, linked here.

4. Work with schools to support the Safe Routes to School Program efforts. The goals of the Safe Routes to School program are to promote and facilitate the use of active and shared transportation for the school commute; encourage a healthy and active lifestyle at an early age; facilitate the planning, development, and implementation of projects and activities that will improve safety and reduce traffic, fuel consumption and air pollution surrounding schools. This includes support of Walk & Roll to School Days in October and May; Pedestrian and Bicycle Safety Education classes; Learn to Ride a Bike programming; and other related efforts that fall within the 6 "E's" (Engineering, Equity, Engagement, Encouragement, Education and Evaluation.)

List of All 4J Schools with Location and Enrollment

Elementary Schools

Adams Elementary School

Adams Elementary School is located at 950 W. 22nd Avenue in Eugene, Oregon serving students grades K-5. The student population is approximately 391 students.

Awbrey Park Elementary School

Awbrey Park Elementary School is located at 158 Spring Creek Drive in Eugene, Oregon serving students grades K-5. The student population is approximately 398 students.

Buena Vista Spanish Immersion Elementary School

Buena Vista Spanish Immersion Elementary School is located at 1500 Queens Way in Eugene, Oregon serving students grades K-5. The student population is approximately 440 students.

Camas Ridge Elementary School

Camas Ridge Elementary School is located at 1150 E. 29th Avenue in Eugene, Oregon serving students grades K-5. The student population is approximately 245 students.

Cesar E. Chavez Elementary School

Cesar E. Chavez Elementary School is located at 1510 W. 14th Avenue in Eugene, Oregon serving students grades K-5. The student population is approximately 343 students.

Charlemagne French Immersion Elementary School

Charlemagne French Immersion Elementary School is located at 3875 Kincaid Street in Eugene, Oregon serving students grades K-5. The student population is approximately 322 students.

Chinese Language Immersion Program

Chinese Language Immersion Program is located at 2200 Bailey Hill Road in Eugene, Oregon serving students grades K-5. This is a new program and student enrollment is 116.

Edgewood Community Elementary School

Edgewood Community Elementary School is located at 577 E. 46th Avenue in Eugene, Oregon serving students grades K-5. The student population is approximately 429 students.

Edison Elementary School

Edison Elementary School is located at 1328 E. 22nd Avenue in Eugene, Oregon serving students grades K-5. The student population is approximately 329 students.

Family School (Elementary)

Family School Elementary is located at 1155 Crest Drive in Eugene, Oregon serving students grades K-5. The student population is approximately 106 students.

Gilham Elementary School

Gilham Elementary School is located at 3307 Honeywood Street in Eugene, Oregon serving students grades K-5. The student population is approximately 573 students.

Holt Elementary School

Bertha Holt Elementary School is located at 770 Calvin Street in Eugene, Oregon serving students grades K-5. The student population is approximately 462 students.

Howard Elementary Technology Immersion School

Howard Elementary Technology Immersion School is located at 700 Howard Avenue in Eugene, Oregon serving students grades K-5. The student population is approximately 481 students.

McCornack Elementary School

McCornack Elementary School is located at 1968 Brittany Street in Eugene, Oregon serving students grades K-5. The student population is approximately 307 students.

River Road/El Camino del Rio Elementary School

River Road/El Camino del Rio Elementary School is located at 120 W. Hilliard Lane in Eugene, Oregon serving students grades K-5. The student population is approximately 393 students.

Spring Creek Elementary School

Spring Creek Elementary School is located at 560 Irvington Drive in Eugene, Oregon serving students grades K-5. The student population is approximately 280 students.

Twin Oaks Elementary School

Twin Oaks Elementary School is located at 85916 Bailey Hill Road in Eugene, Oregon serving students grades K-5. The student population is approximately 202 students.

Willagillespie Elementary School

Willagillespie Elementary School is located at 1125 Willagillespie Road in Eugene, Oregon serving students grades K-5. The student population is approximately 452 students.

Yujin Gakuen Japanese Immersion Elementary School

Yujin Gakuen Japanese Immersion Elementary School is located at 850 Howard Avenue in Eugene, Oregon (as of 2023-24) serving students grades K-5. The student population is approximately 245 students.

Fox Hollow Instructional Center

Fox Hollow Instructional Center is located at 5055 Mahalo Drive in Eugene, Oregon serving students grades K-12. The student population is approximately 3 students.

Middle Schools

Arts & Technology Academy

Arts & Technology Academy is located at 1650 W. 22nd Avenue in Eugene, Oregon serving students grades 6-8. The student population is approximately 389 students.

Cal Young Middle School

Cal Young Middle School is located at 2555 Gilham Road in Eugene, Oregon serving students grades 6-8. The student population is approximately 498 students.

Kelly Middle School

Kelly Middle School is located at 850 Howard Road Avenue in Eugene, Oregon serving students grades 6-8. The student population is approximately 422 students.

Kennedy Middle School

Kennedy Middle School is located at 2200 Bailey Hill Road in Eugene, Oregon serving students grades 6-8. The student population is approximately 353 students.

Madison Middle School

Madison Middle School is located at 875 Wilkes Drive in Eugene, Oregon serving students grades 6-8. The student population is approximately 407 students.

Monroe Middle School

Monroe Middle School is located at 2800 Bailey Lane in Eugene, Oregon serving students grades 6-8. The student population is approximately 504 students.

Roosevelt Middle School

Roosevelt Middle School is located at 500 E. 24th Avenue in Eugene, Oregon serving students grades 6-8. The student population is approximately 558 students.

Spencer Butte Middle School

Spencer Butte Middle School is located at 500 E. 43rd Avenue in Eugene, Oregon serving students grades 6-8. The student population is approximately 352 students.

<u>High Schools</u>

Churchill High School

Churchill High School is located at 1850 Bailey Hill Road in Eugene, Oregon serving students grades 9-12. The student population is approximately 1073 students.

Eugene Education Options Program

Eugene Education Options is located at 200 N Monroe Street in Eugene, Oregon serving students grades 9-12. The student population is approximately 71 students.

North Eugene High School

North Eugene High School is located at 200 Silver Lane in Eugene, Oregon serving students grades 9-12. The student population is approximately 1098 students.

Sheldon High School

Sheldon High School is located at 2455 Willakenzie Road in Eugene, Oregon serving students grades 9-12. The student population is approximately 1500 students.

South Eugene High School

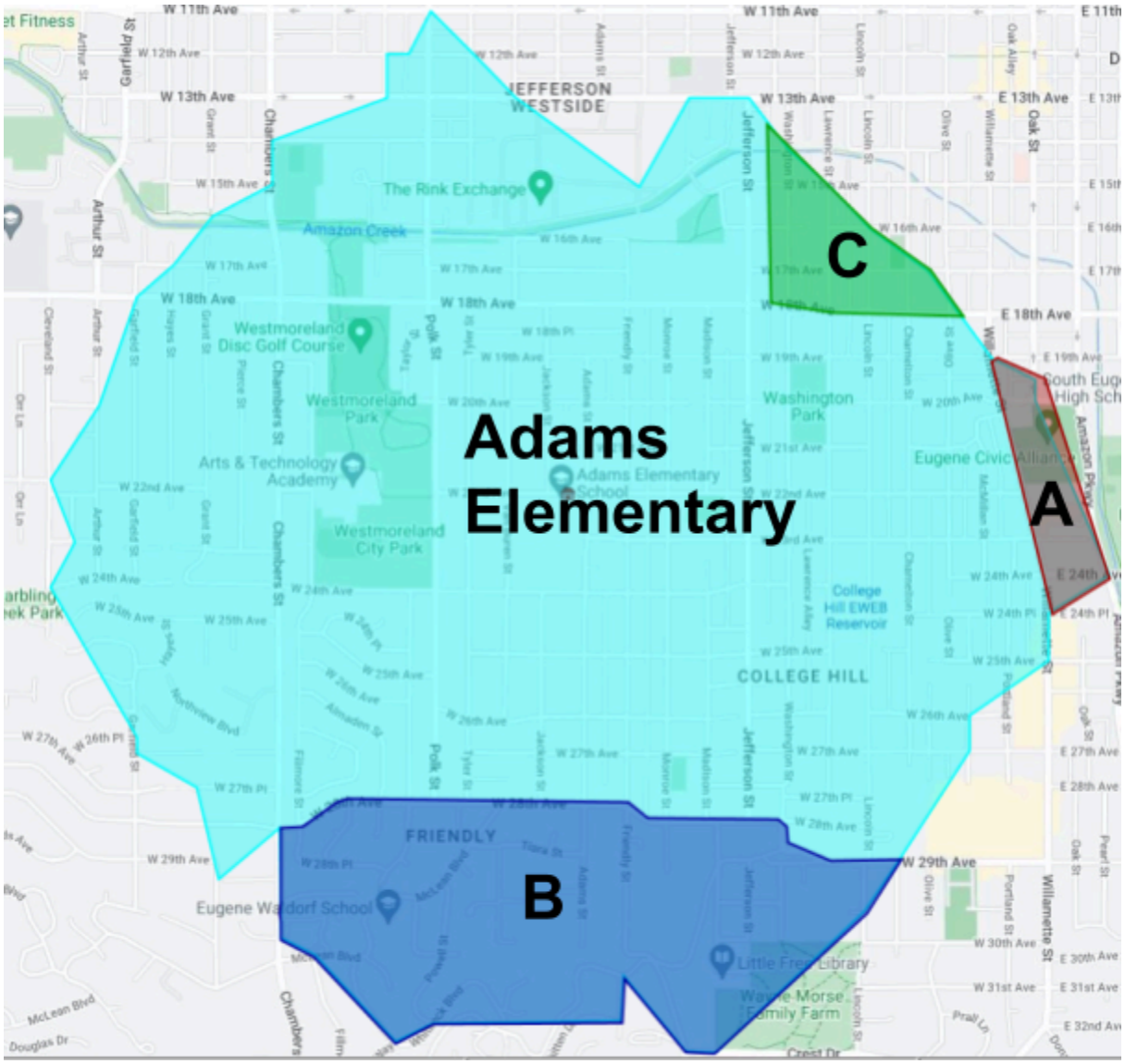
South Eugene High School is located at 400 E. 19th Avenue in Eugene, Oregon serving students grades 9-12. The student population is approximately 1496 students.

Descriptions and Maps of Hazards

Adams Elementary

Total Enrollment:	391
Approx. Number of Students Affected:	57

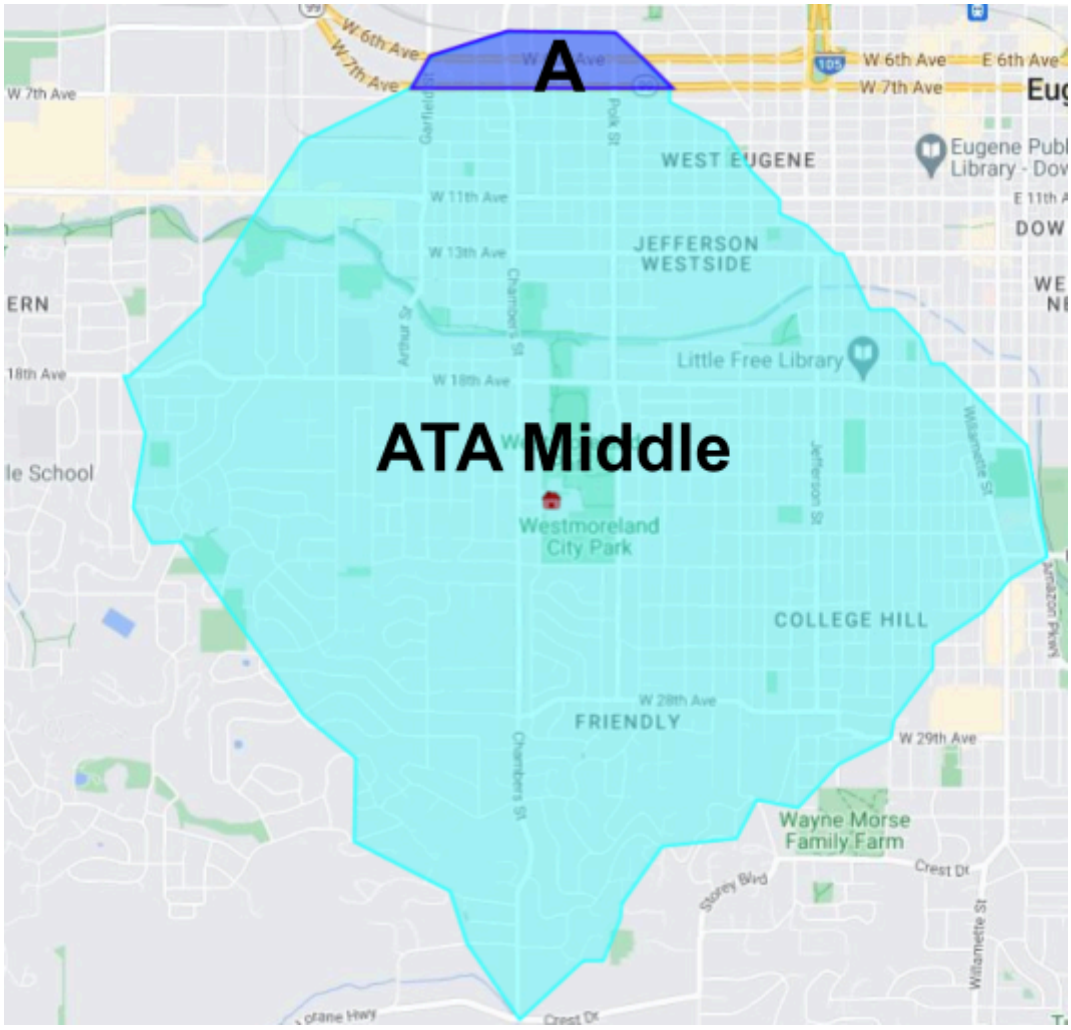
Hazard(s):	
Hazard A	Willamette Street between 19th-25th Avenues - arterial, crash history, difficult crossing.
Hazard B	W 28th/29th Avenue between Chambers Street and Lincoln Street (with the exception of Friendly Street to Jefferson Street) - arterial, crash history, crossing safety.
Hazard C	18th Avenue between Willamette Street and Jefferson Street - arterial, crash history, crossing safety.


Adams
Elementary
A
B
C
JEFFERSON
WESTSIDE
FRIENDLY
COLLEGE HILL
The Rink Exchange
Amazon Creek
Westmoreland
Disc Golf Course
Westmoreland
Park
Arts & Technology
Academy
Adams Elementary
School
Westmoreland
City Park
Washington
Park
College
Hill EWEB
Reservoir
Eugene Waldorf School
Little Free Library
W 11th Ave
W 12th Ave
W 13th Ave
W 15th Ave
W 16th Ave
W 17th Ave
W 18th Ave
W 19th Ave
W 20th Ave
W 21st Ave
W 22nd Ave
W 24th Ave
W 25th Ave
W 26th Ave
W 27th Ave
W 28th Ave
W 29th Ave
W 30th Ave
W 31st Ave
E 11th
E 13th Ave
E 15th
E 16th
E 17th
E 18th Ave
E 19th Ave
E 24th Ave
E 27th Ave
E 28th Ave
E 30th Ave
E 31st Ave
E 32nd Av
Arthur St
Chambers St
Pierce St
Garfield St
Grant St
Hayes St
Polk St
Tyler St
Jefferson St
Adams St
Madison St
Monroe St
Lincoln St
Olive St
Oak St
Willamette St
Pearl St
Portland St
Lawrence St
Lawrence Alley
Charnelton St
McMillan St
Amazon Pkwy
Northview Blvd
McLean Blvd
Douglas Dr
Crest Dr
Prall Ln
Wayne Morse
Family Farm

Arts and Technology Academy

Total Enrollment:	389
Approx. Number of Students Affected:	0

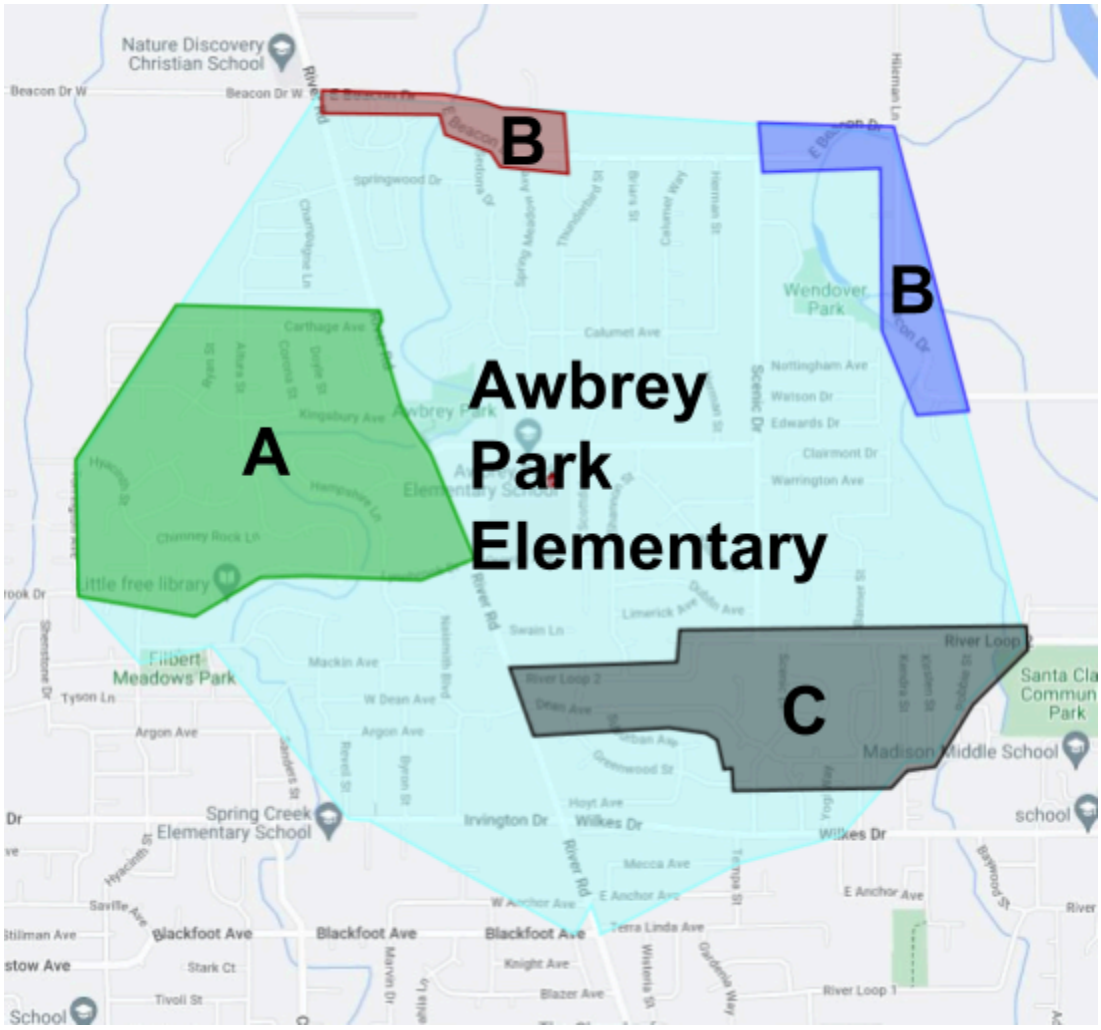
Hazard(s):	
Hazard A	- 6th Avenue between Tyler & Taylor - arterial, crash history, difficult crossing. - 7th Avenue between Chambers Street & Van Buren - arterial, crash history, difficult crossing.


A
ATA Middle
W 6th Ave
W 7th Ave
W 7th Ave
W 6th Ave
E 6th Ave
WEST EUGENE
Eugene Publ
Library - Dow
JEFFERSON
WESTSIDE
W 11th Ave
W 13th Ave
W 18th Ave
Little Free Library
Westmoreland
City Park
COLLEGE HILL
FRIENDLY
W 28th Ave
W 29th Ave
Wayne Morse
Family Farm
Crest Dr
Storey Blvd
Willamette St
Chambers St
Pearl St
Jefferson St
Polk St
Garfield St
Arthur St
18th Ave
le School
ERN
DOW

Awbrey Park Elementary

Total Enrollment:	440
Approx. Number of Students Affected:	70

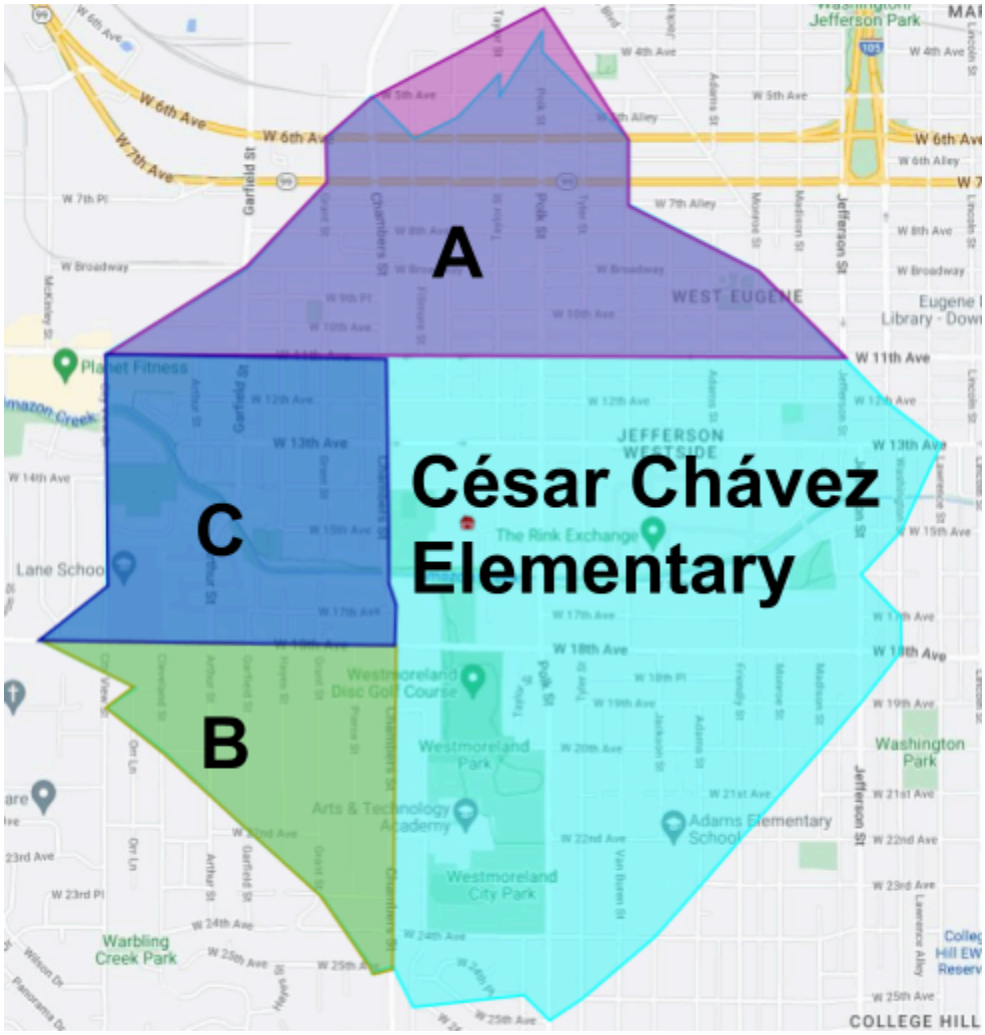
Hazard(s):	
Hazard A	River Road between Beacon Drive and Blackfoot Avenue - major arterial, crash history, difficult crossing
Hazard B	Beacon Drive between River Road & Futura and between Scenic to River Loop 1 - high posted speed, poor sight lines with no available walking or biking space
Hazard C	River Lp #2 - high posted speed, limited walking or biking space


Awbrey Park Elementary
A
B
B
C
Nature Discovery Christian School
Beacon Dr W
Springwood Dr
Wendover Park
Calumet Ave
Nottingham Ave
Watson Dr
Edwards Dr
Claremont Dr
Warrington Ave
Awbrey Park
Carthage Ave
Kingsbury Ave
Chimney Rock Ln
little free library
Hemingway Ln
Swain Ln
Limerick Ave
Dublin Ave
River Loop 2
River Loop 1
Mackin Ave
W Dean Ave
Argon Ave
Tyson Ln
Meadows Park
Madison Middle School
Spring Creek Elementary School
Irvington Dr
Wilkes Dr
Hoyt Ave
Greenwood St
Mecca Ave
E Anchor Ave
W Anchor Ave
Terra Linda Ave
Knight Ave
Blazer Ave
Blackfoot Ave
Stark Ct
Tivoli St
Saville Ave
Hyacinth St
River Rd
Scenic Dr
Hiserman Ln
Baywood St
Santa Cla
Commun
Park
school
School

Cesar Chavez Elementary

Total Enrollment:	343
Approx. Number of Students Affected:	36

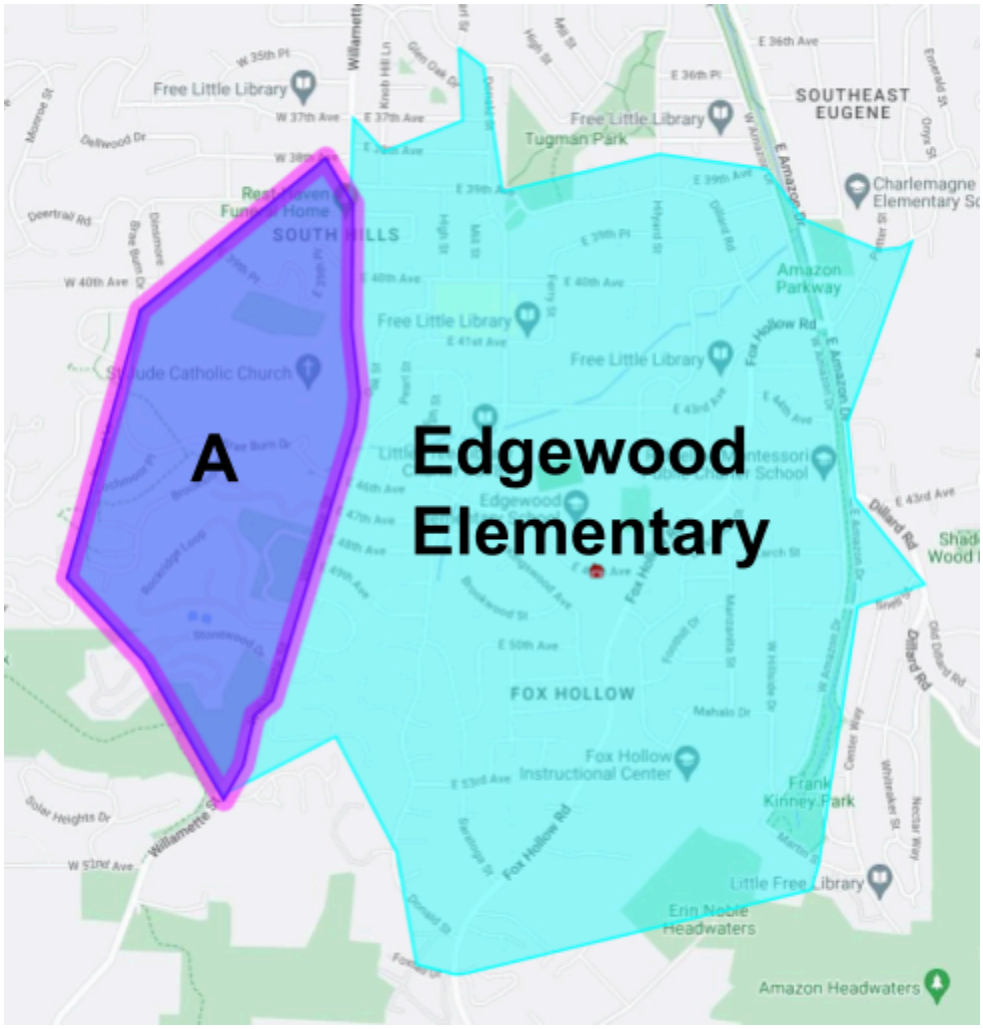
Hazard(s):	
Hazard A	- 11th Avenue - arterial, difficult crossing, crash history - 7th Avenue - arterial, difficult crossing, crash history - 6th Avenue - arterial, difficult crossing, crash history
Hazard B	- 18th Avenue between Chambers Street and Hawkins - arterial, difficult crossing, crash history - Chambers between 18th and 25th - arterial, difficult crossing, multiple lanes, crash history
Hazard C	- Chambers Street between 11th and 18th Avenues - arterial, difficult crossing, multiple lanes, crash history *Use a crossing guard for this location rather than bus. The projected annual cost for busing for this hazard is $8,392. The cost for 1 hour of crossing guard time/day is projected to be $4,944.


A
C
B
César Chávez
Elementary
W 6th Ave
W 7th Ave
Garfield St
W 11th Ave
W 13th Ave
W 18th Ave
Jefferson St
Jefferson Park
WEST EUGENE
JEFFERSON
WESTSIDE
Planet Fitness
The Rink Exchange
Westmoreland
Disc Golf Course
Westmoreland
Park
Arts & Technology
Academy
Adams Elementary
School
Westmoreland
City Park
Warbling
Creek Park
Washington
Park
COLLEGE HILL

Edgewood Elementary

Total Enrollment:	429
Approx. Number of Students Affected:	24

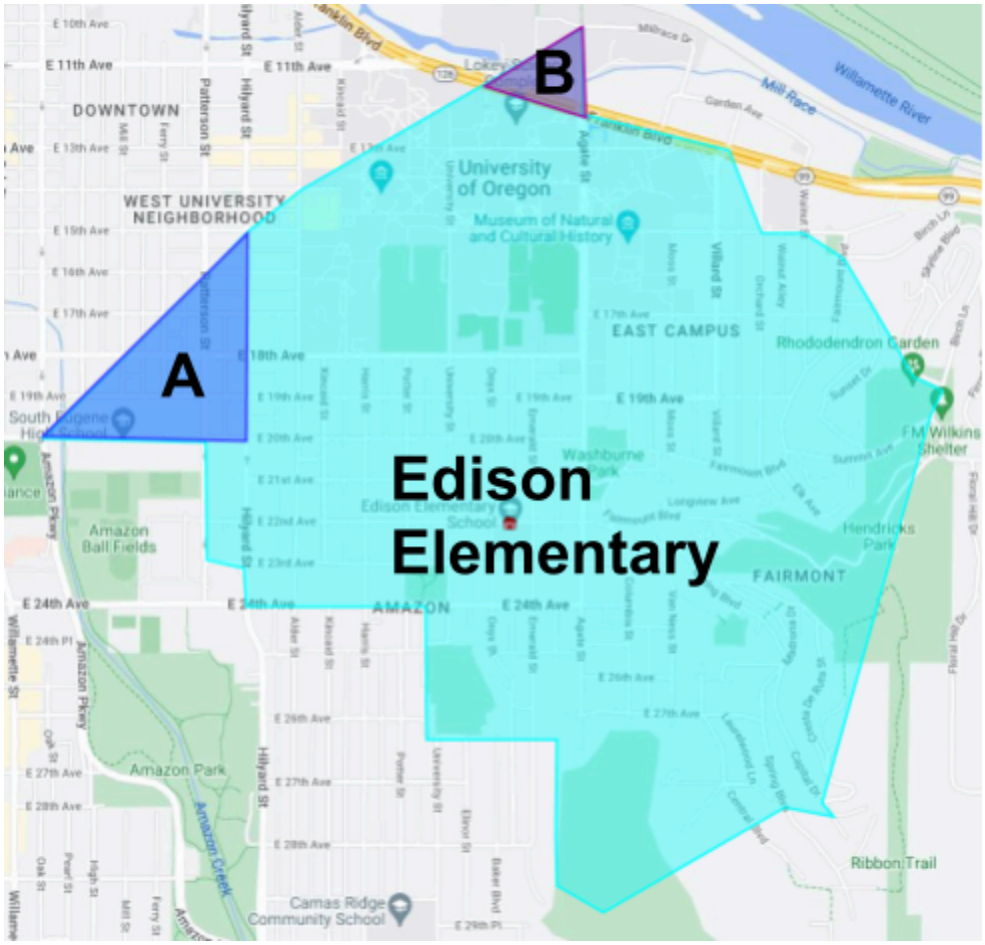
Hazard(s):	
Hazard A	Willamette Street between 37th Avenue & Spencers Crest - difficult crossing, high posted speed limit, crash history


A
Edgewood Elementary
Free Little Library
Tugman Park
SOUTHEAST EUGENE
Charlemagne Elementary
SOUTH HILLS
Amazon Parkway
Fox Hollow Rd
Edgewood
FOX HOLLOW
Fox Hollow Instructional Center
Frank Kinney Park
Dillard Rd
Erin Noble Headwaters
Amazon Headwaters

Edison Elementary

Total Enrollment:	329
Approx. Number of Students Affected:	9

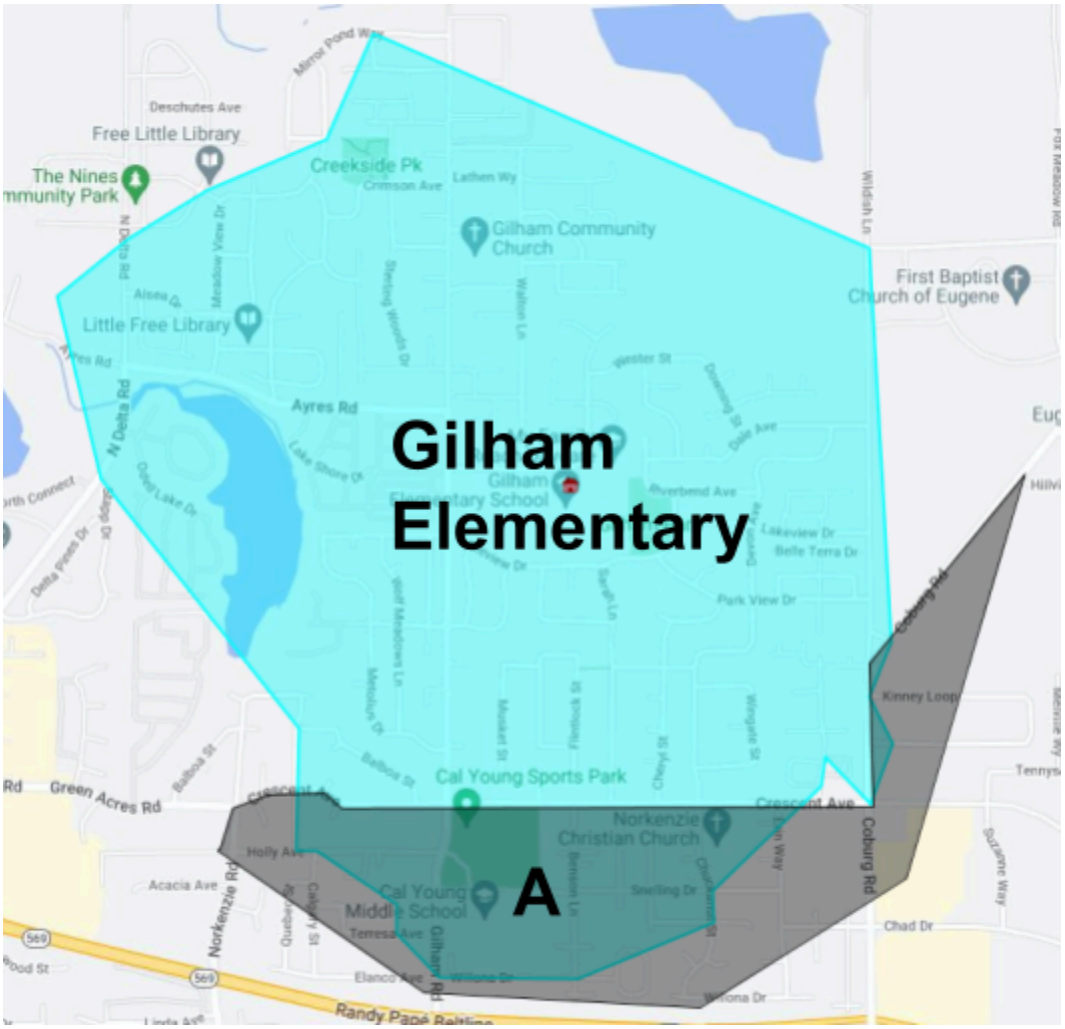
Hazard(s):	
Hazard A	Hilyard Street between 15th & 20th Avenue - arterial, difficult crossing, crash history
Hazard B	Franklin Boulevard between 11th Avenue and Agate Street - arterial, difficult crossing, crash history


B
A
Edison
Elementary
DOWNTOWN
WEST UNIVERSITY
NEIGHBORHOOD
University
of Oregon
Museum of Natural
and Cultural History
EAST CAMPUS
Rhododendron Garden
FM Wilkins
Shelter
Washburne
Park
Edison Elementary
School
Amazon
Ball Fields
FAIRMONT
Hendricks
Park
AMAZON
Amazon Park
Amazon Creek
Ribbon Trail
Camas Ridge
Community School
Willamette River
Mill Race
Franklin Blvd
E 11th Ave
E 18th Ave
E 19th Ave
E 24th Ave

Gilham Elementary

Total Enrollment:	573
Approx. Number of Students Affected:	33

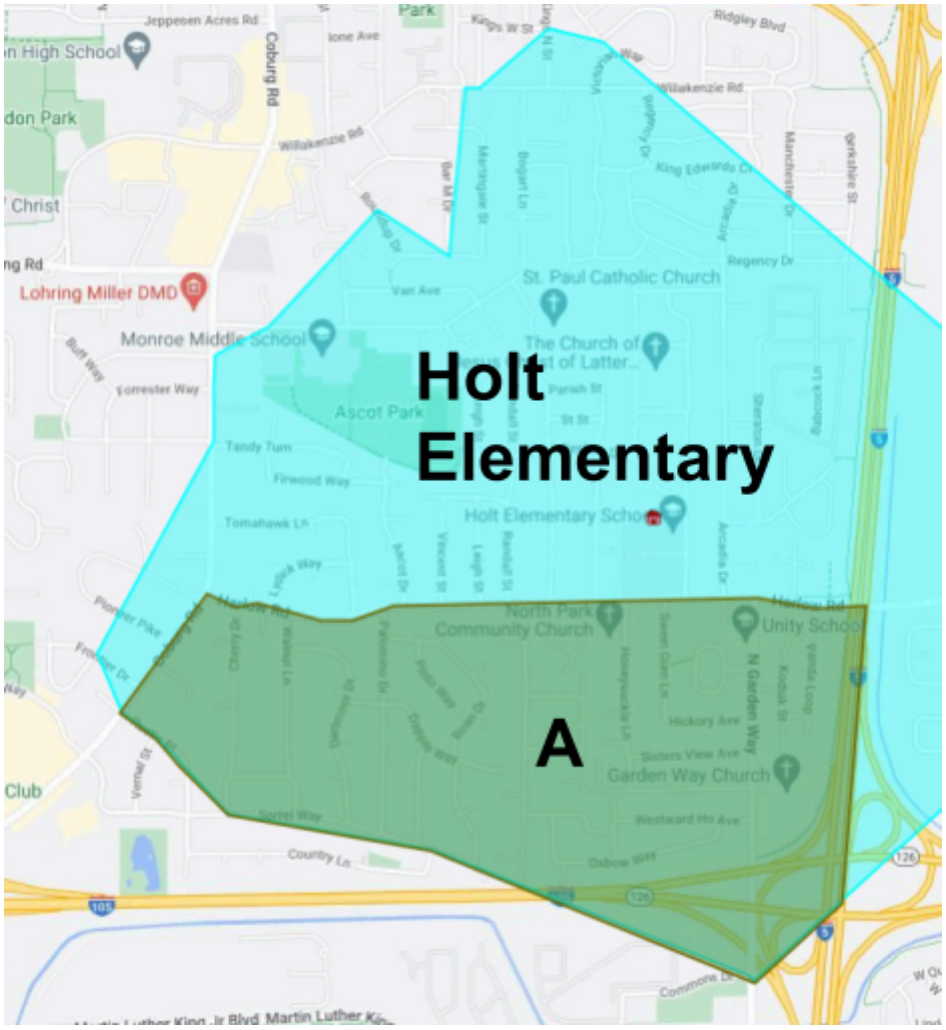
Hazard(s):	
Hazard A	- Crescent Avenue between Norkenzie Road & Coburg Road - arterial, crash history, difficult crossing - Coburg Road - major arterial, difficult crossing, multiple lanes


Gilham
Elementary
A
Free Little Library
The Nines
Creekside Pk
Gilham Community
Church
First Baptist
Church of Eugene
Little Free Library
Ayres Rd
N Delta Rd
Gilham
Elementary School
Riverbend Ave
Park View Dr
Coburg Rd
Kinney Loop
Cal Young Sports Park
Green Acres Rd
Norkenzie
Christian Church
Cal Young
Middle School
Norkenzie Rd
Acacia Ave
Holly Ave
Crescent Ave
Chad Dr
Randy Pape Beltline

Holt Elementary

Total Enrollment:	462
Approx. Number of Students Affected:	75

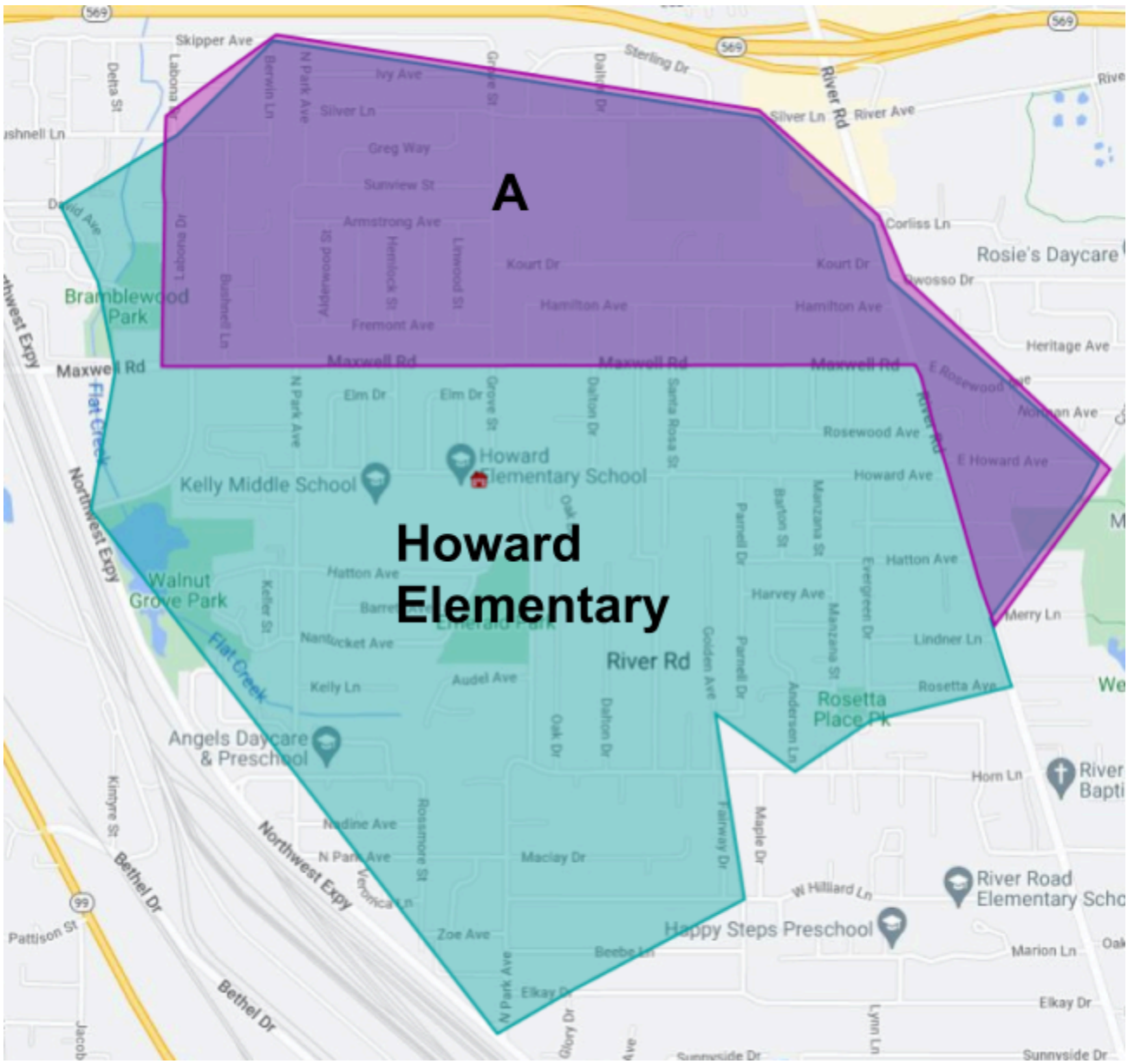
Hazard(s):	
Hazard A	Harlow Road - arterial, high posted speed, crash history *Use a crossing guard at Harlow and the light between Honeysuckle Lane and Sweet Gum Lane for this location rather than bus. The projected annual cost for busing for this hazard is $8,392. The cost for 1 hour of crossing guard time/day is projected to be $4,944.


Holt
Elementary
A
Lohring Miller DMD
Monroe Middle School
St. Paul Catholic Church
Ascot Park
Holt Elementary School
North Park
Community Church
Unity School
Garden Way Church
Jeppesen Acres Rd
Coburg Rd
Willakenzie Rd
Ridgley Blvd
Van Ave
Regency Dr
Tandy Turn
Firwood Way
Tomahawk Ln
Hickory Ave
Sisters View Ave
Westward Ho Ave
Country Ln
Oxbow Way
Sorrel Way
Forrester Way
Buff Way
Frohnert Dr
Vernal St
Parish St
Martin Luther King Jr Blvd

Howard Elementary

Total Enrollment:	481
Approx. Number of Students Affected:	129

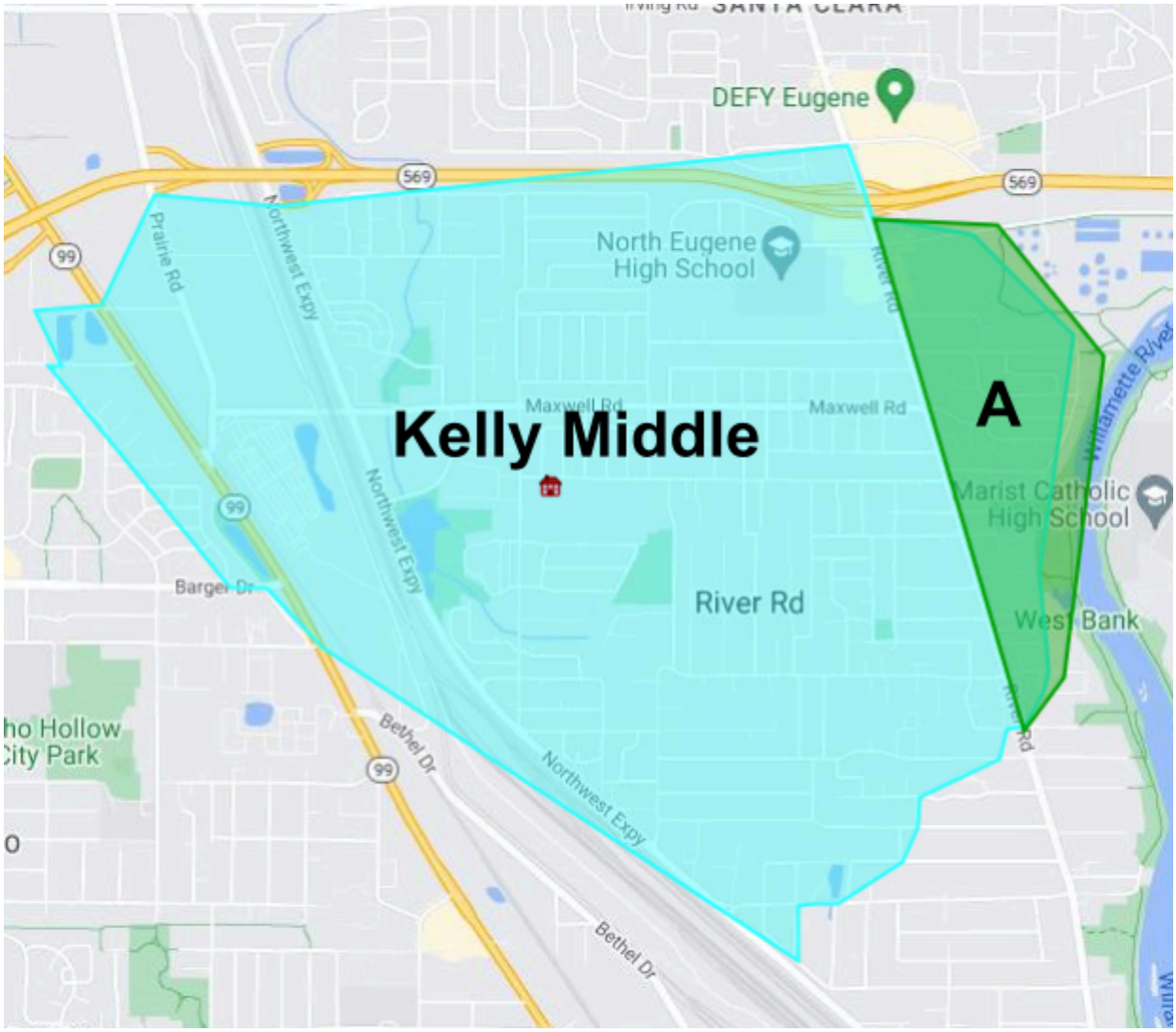
Hazard(s):	
Hazard A	- River Road - major arterial, high posted speed, crash history, difficult crossing - Maxwell Road - arterial, high posted speed, crash history


A
Howard Elementary
Skipper Ave
Sterling Dr
River Rd
River Ave
Silver Ln
Greg Way
Sunview St
Armstrong Ave
Corliss Ln
Rosie's Daycare
Kourt Dr
Hamilton Ave
Bramblewood Park
Fremont Ave
Maxwell Rd
Heritage Ave
Elm Dr
Howard Elementary School
Kelly Middle School
Rosewood Ave
E Howard Ave
Howard Ave
Hatton Ave
Walnut Grove Park
Harvey Ave
Merry Ln
Lindner Ln
Nantucket Ave
Audel Ave
Kelly Ln
Rosetta Ave
Rosetta Place Pk
Angels Daycare & Preschool
Horn Ln
Nadine Ave
N Park Ave
Maclay Dr
W Hilliard Ln
River Road Elementary Scho
Happy Steps Preschool
Zoe Ave
Marion Ln
Elkay Dr
Sunnyside Dr
Northwest Expy
Flat Creek
Bethel Dr
Pattison St
Maple Dr
Fairway Dr
Golden Ave
Parnell Dr
Barton St
Manzana St
Evergreen Dr
Andersen Ln
Dalton Dr
Oak Dr
Santa Rosa St
Grove St
Elmwood St
Hemlock St
Rosemore St
Veronica Ln
Kimyre St
Keller St
Lynn Ln
Delta St
Labona Dr
Berwin Ln
N Park Ave
Ivy Ave
Silver Ln
Dalton Dr
Bushnell Ln
Hazelwood St
Linwood St
Maxwell Rd
Elm Dr
Rosewood Ave
Howard Ave
Hatton Ave
Harvey Ave
Nantucket Ave
Kelly Ln
Audel Ave
Nadine Ave
N Park Ave
Maclay Dr
Zoe Ave
Elkay Dr
Sunnyside Dr
Horn Ln
Marion Ln
Lynn Ln
Maple Dr
Fairway Dr
Golden Ave
Parnell Dr
Barton St
Manzana St
Evergreen Dr
Andersen Ln
Dalton Dr
Oak Dr
Santa Rosa St
Grove St
Rosemore St
Kimyre St
Keller St
Delta St
Labona Dr
Berwin Ln
N Park Ave
Ivy Ave
Silver Ln
Bushnell Ln
Hazelwood St
Linwood St
Hemlock St
Fremont Ave

Kelly Middle School

Total Enrollment:	422
Approx. Number of Students Affected:	28

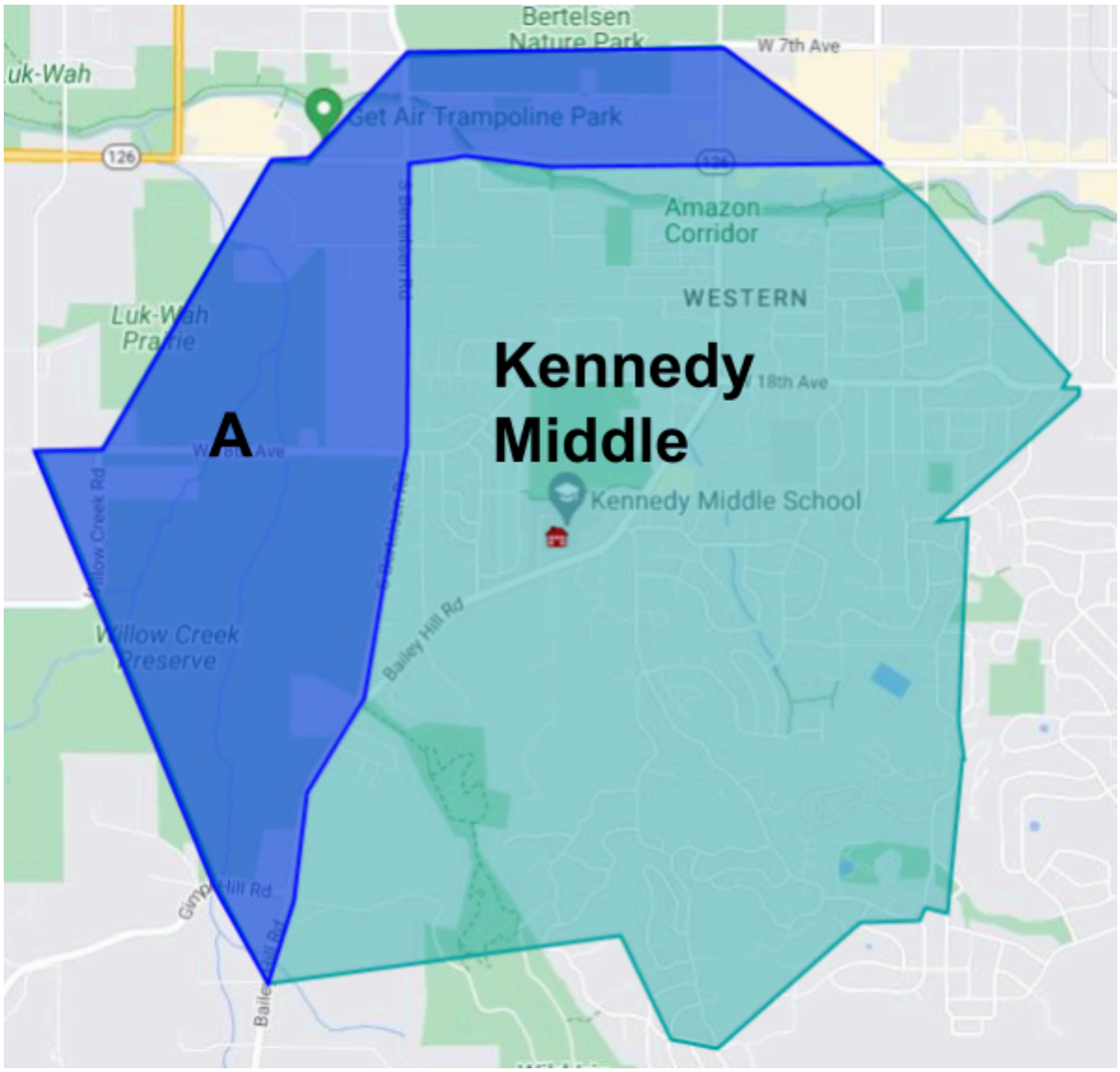
Hazard(s):	
Hazard A	River Road - major arterial, high posted speed, crash history, difficult crossing


DEFY Eugene
569
569
99
Prairie Rd
Northwest Expy
North Eugene
High School
River Rd
Maxwell Rd
Maxwell Rd
Kelly Middle
A
Willamette River
Marist Catholic
High School
99
Barger Dr
Northwest Expy
River Rd
West Bank
Bethel Dr
99
Northwest Expy
Bethel Dr

Kennedy Middle School

Total Enrollment:	353
Approx. Number of Students Affected:	13

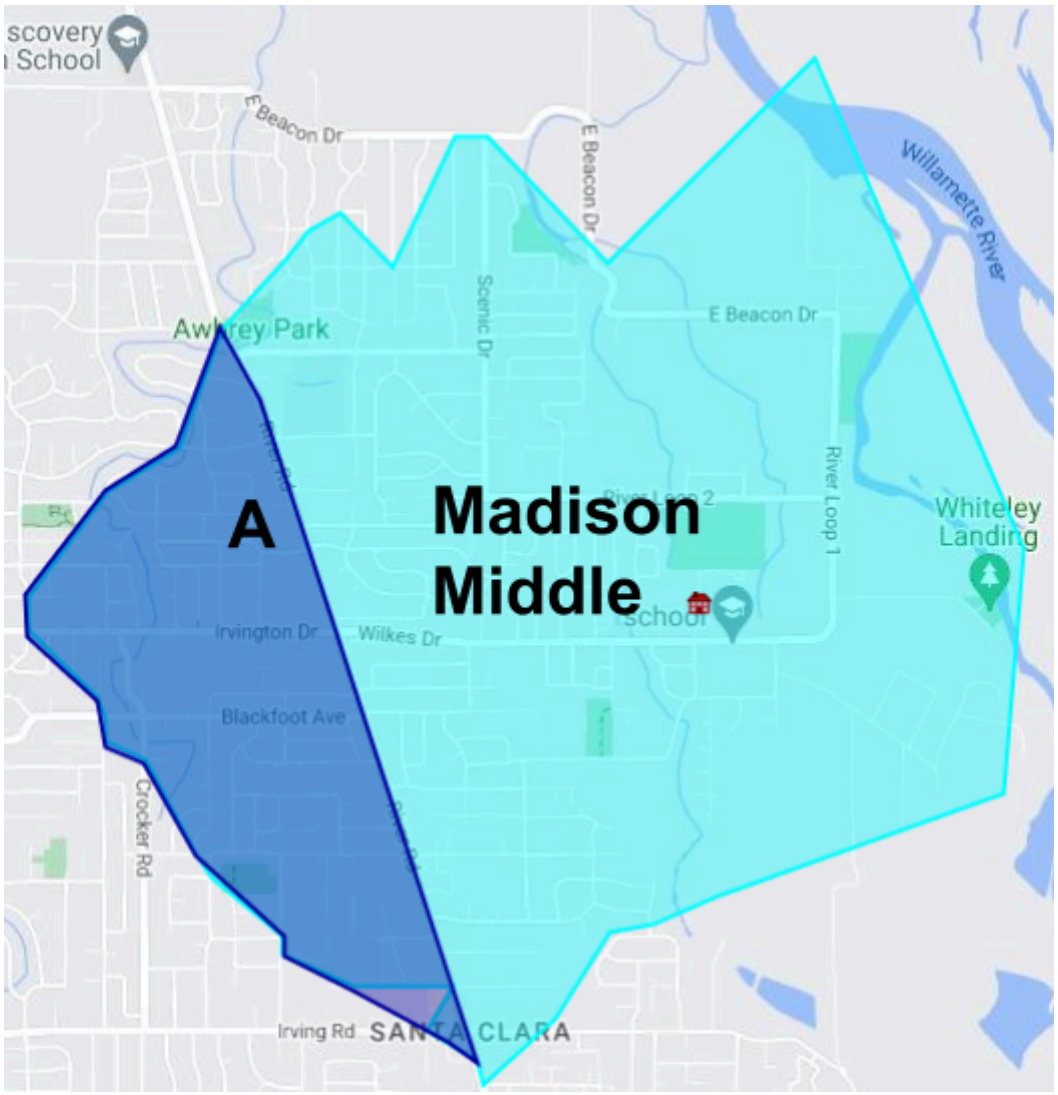
Hazard(s):	
Hazard A	- Bertleson between Bailey Hill & 18th - arterial, high posted speed, no walking or biking space, difficult crossing - Bailey Hill Road between Bertleson and Klouts - arterial, high posted speed, little walking or biking space, difficult crossing - West 11th Avenue - major arterial, multiple lanes, crash history


Bertelsen Nature Park
W 7th Ave
Get Air Trampoline Park
126
Amazon Corridor
WESTERN
Luk-Wah Prairie
Kennedy Middle
A
W 18th Ave
Kennedy Middle School
Willow Creek Rd
Bailey Hill Rd
Willow Creek Preserve

Madison Middle School

Total Enrollment:	407
Approx. Number of Students Affected:	44

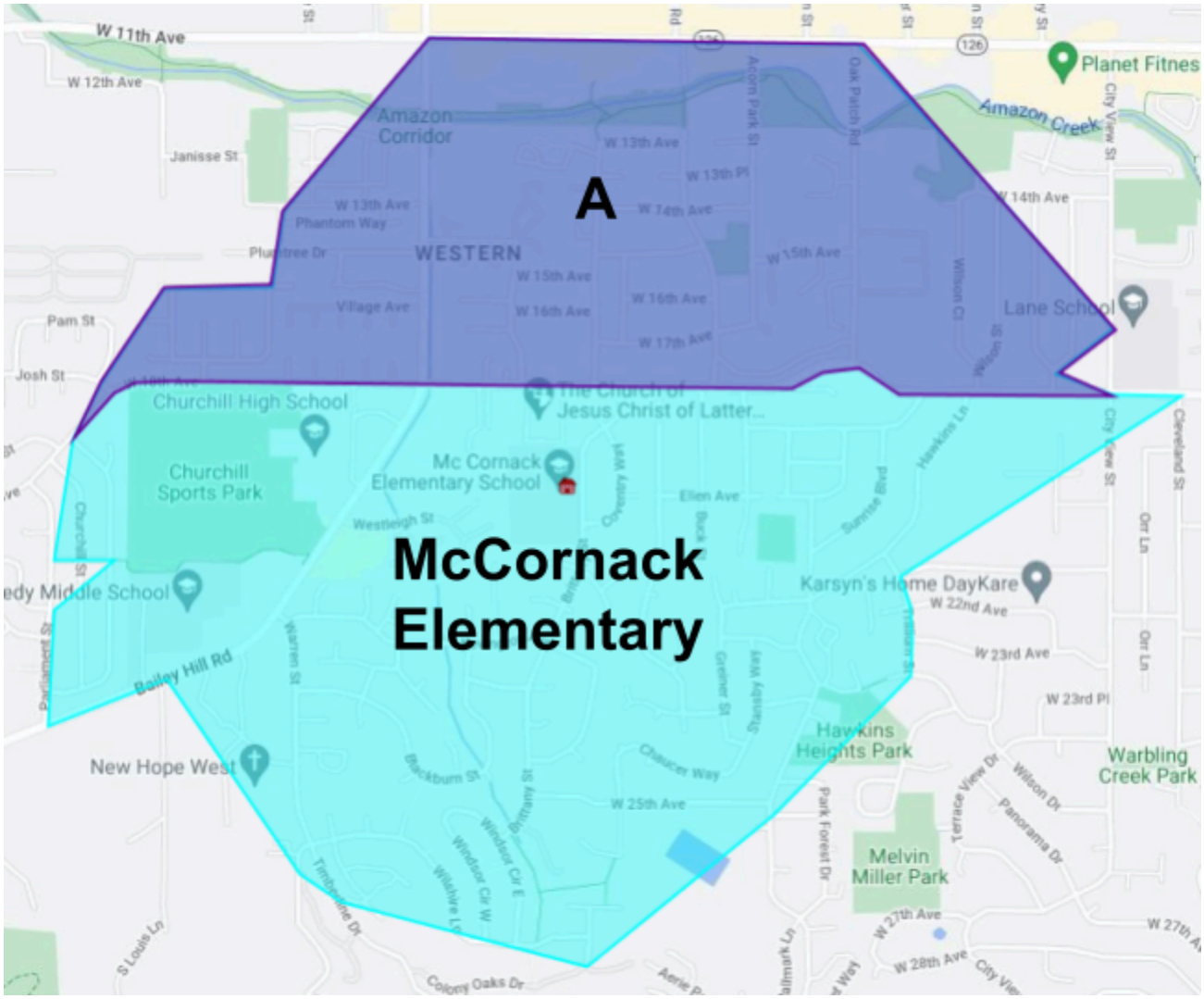
Hazard(s):	
Hazard A	- River Road - major arterial, high posted speed, crash history, difficult crossing - Irving Road - crash history, difficult crossing, high speed


scovery
School
E Beacon Dr
E Beacon Dr
Willamette River
Awbrey Park
Scenic Dr
E Beacon Dr
River Loop 1
A
Madison
Middle
School
Whiteley
Landing
Irvington Dr
Wilkes Dr
Blackfoot Ave
Crocker Rd
Irving Rd
SANTA CLARA

McCornack Elementary

Total Enrollment:	307
Approx. Number of Students Affected:	113

Hazard(s):	
Hazard A	- Bailey Hill Road north of 11th - arterial, high posted speed, crash history, difficult crossing - West 18th Avenue between Bailey Hill Road and Buck Street - arterial, crash history, difficult crossing *Use a crossing guard at 18th and Brittany for this location rather than bus. The projected annual cost for busing is $6,731. The cost for 1.25 hours of crossing guard time/day is projected to be $6,180.


A
McCornack Elementary
W 11th Ave
W 12th Ave
Amazon Corridor
Janisse St
W 13th Ave
W 13th Pl
W 14th Ave
Phantom Way
WESTERN
W 15th Ave
W 16th Ave
W 17th Ave
Village Ave
Pam St
Josh St
Planet Fitness
Amazon Creek
Lane School
Churchill High School
The Church of Jesus Christ of Latter...
Churchill Sports Park
Mc Cornack Elementary School
Ellen Ave
Westleigh St
Karsyn's Home DayKare
W 22nd Ave
W 23rd Ave
W 23rd Pl
Bailey Hill Rd
Hawkins Heights Park
Warbling Creek Park
New Hope West
Blackburn St
Chaucer Way
W 25th Ave
Melvin Miller Park
W 27th Ave
W 28th Ave
Colony Oaks Dr
S Louis Ln

River Road Elementary

Total Enrollment:	393
Approx. Number of Students Affected:	20

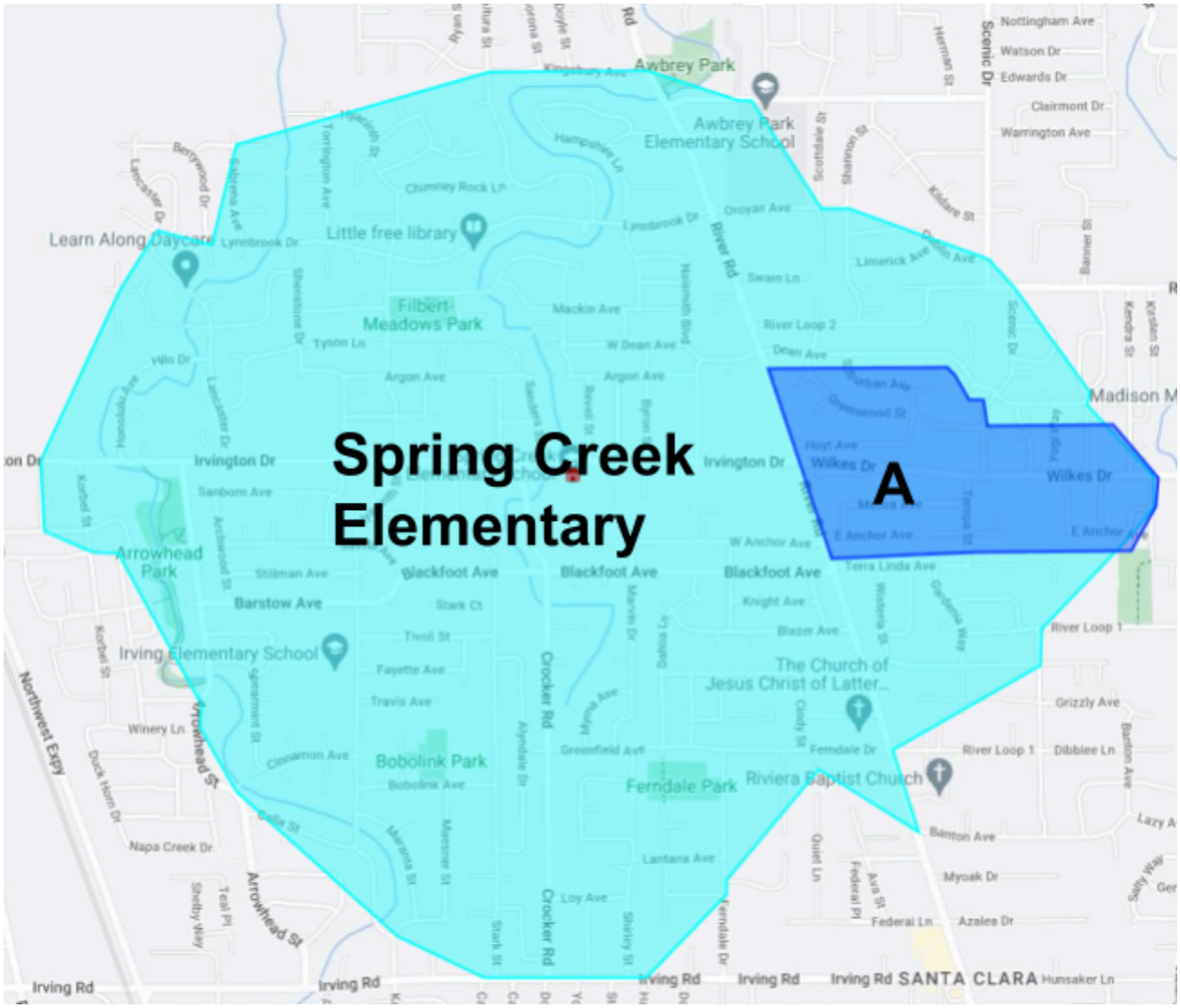
Hazard(s):	
Hazard A	River Road - major arterial, high posted speed, crash history, difficult crossing


River Road
Elementary
A
Maxwell Rd
Howard Elementary School
Emerald Park
River Rd
Rosetta Place Pk
Marist Catholic High School
West Bank
River Road Baptist Church
River Road Elementary School
Happy Steps Preschool
Northwest Expy
Bethel Dr
Railroad Dr
Willamette River

Spring Creek Elementary

Total Enrollment:	280
Approx. Number of Students Affected:	35

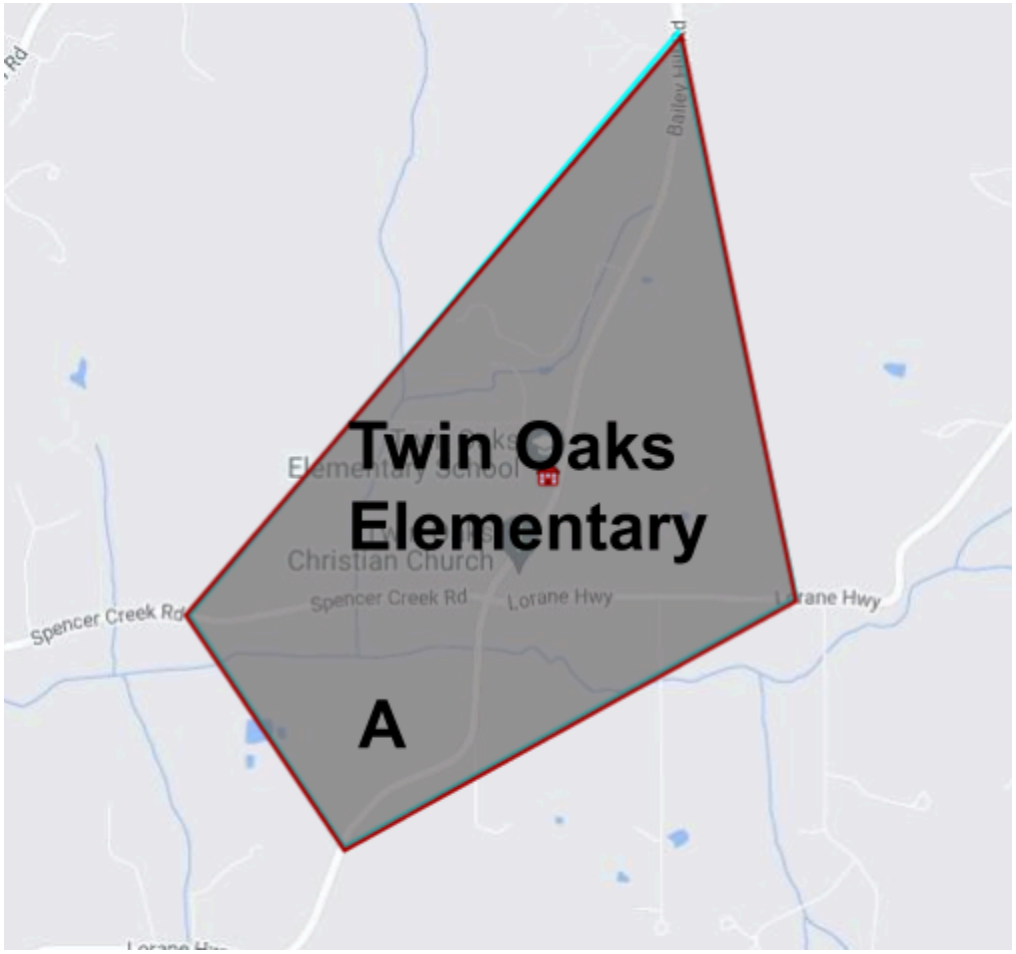
Hazard(s):	
Hazard A	River Road - major arterial, high posted speed, crash history, difficult crossing


Spring Creek Elementary
A
Awbrey Park
Awbrey Park Elementary School
Learn Along Daycare
Little free library
Filbert Meadows Park
Irvington Dr
Wilkes Dr
Arrowhead Park
Barstow Ave
Blackfoot Ave
Irving Elementary School
Bobolink Park
Ferndale Park
Riviera Baptist Church
The Church of Jesus Christ of Latter...
Crocker Rd
Arrowhead St
Northwest Expy
Irving Rd
SANTA CLARA
Madison M

Twin Oaks Elementary

Total Enrollment:	202
Approx. Number of Students Affected:	4

Hazard(s):	
Hazard A	- Bailey Hill Road - difficult crossing, high speed, no safe walking/biking space - Spencer Creek Road/Lorane Highway - difficult crossing, high speed, no safe walking/biking space


Twin Oaks
Elementary
A
Christian Church
Spencer Creek Rd
Lorane Hwy

Equity Informed Temporary Transport Program

4J will pilot an Equity Informed Temporary Transport Program for the school years 2024/25, 2025/26, and 2026/27. During this time 4J will document program use, and evaluate its efficacy regarding attendance and successful transitions away from temporary district provided transportation.

Rational- At times transportation based attendance barriers are identified that otherwise would not normally qualify a student for district provided transportation. When these barriers are identifiable as an equity concern, this program seeks to remove this barrier by providing district transport for up to three months while long-term solutions are sought.

Process and expectations

- Each equity informed transportation plan will be established and evaluated on a case-by-case basis. A serious attendance concern coupled with an equity issue that negatively impacts accessing the educational facility must be demonstrated to utilize this program.
    - Equity considerations may include, but not be limited to: poverty, hate and bias, language barriers/new arrivals, student or family medical problems, and general education director equity informed placements.
- Each equity informed transportation plan will outline a path to resolve the circumstances that challenges the students' ability to get to and from school by other means. District support team and the family will work together to develop and execute this plan.
    - The District support team may include Building administration, Office of Family Support, Safe Routes to School, Transportation, Student Services (SSD), Equity In Academic Avancement Managers, Office of School Choice, and School Safety and Emergency Management.
- All equity informed transportation plans, must be reviewed by, and have the approval of both an Educational Director, and the Director of Transportation. Directors will evaluate equity informed transportation plan proposals in keeping with district values outlined in Board Policies and utilizing the district Equity Decision Making Tool.

Appendix A- General Transportation Guidelines

Code: **EEA**

Adopted: 5/24/04

Eugene School District 4J

Revised/Readopted: 2/26/07; 10/11/10; 9/26/11; 5/14/12; 10/22/12

Orig. Code(s): EEA

Student Transportation Services

School transportation services will be provided for students to and from school and for transporting students to and from curricular and extracurricular activities sponsored by the district, for transporting from one school or facility to another, and for approved school-sponsored field trips that are extensions of classroom learning experiences. Transportation will be provided for homeless students to and from the student's school of origin[1] as required by the No Child Left Behind Act of 2001 (NCLBA). These services shall be provided throughout the regularly scheduled year and during the regular school day as determined by the Board.

Elementary students (grades K-5) who live more than one mile from school will be transported. Secondary students (grades 6-12) who live more than one and one-half miles from school will be transported. Mileage exceptions for health, safety or disability will be made in accordance with the district's approved supplemental plan.

Students living within specified attendance boundaries shall receive transportation services to their respective schools. In addition, students, including those receiving special education, may be eligible for transportation for health or safety reasons.

Miles from school will be determined by the transportation supervisor in accordance with OAR 581-023-0040 (1) (c).

The district may use Type 10 School Activity Vehicles to transport students from home to school, school to home and from district-sponsored activities.

The district may also provide transportation using federal funds[2] or through cooperative agreements with local victims assistance units for a student to attend a safe district school[3] out of the student's attendance area for any student who is a victim of a violent criminal offense occurring in or on the grounds of the school the student attends or the student attends a school identified as persistently dangerous.

[1] School of origin means the school that the student attended when permanently housed or the school in which the student was last enrolled.

[2]Federal funds means funds available through Title IV, Part A, and Title V, Part A.

[3] If there is not another school in the district to which students can transfer, districts are encouraged, but not required, to explore other appropriate options, i.e., an agreement with a neighboring district.

If there are no other schools within the district a student may transfer to, the district may establish a cooperative agreement with other districts in the area for a transfer. Transportation for students who transfer for such purposes will be provided in accordance with the agreement.

Students attending any private, parochial or public charter school under the compulsory school attendance laws will, where the private, parochial or public charter school is along or near the bus route, be provided equally the riding privileges given to public school students.

Preschool students with disabilities who have transportation as a related service and children from birth to age three who are enrolled in an eligible program shall be provided home to school transportation.

A seat that fully supports each person and meets the minimum standards and specifications of law will be provided at all times. A person who weighs 40 pounds or less must be properly secured with a child safety system that meets the minimum standards and specifications established by the Oregon Department of Transportation under ORS 815.055. A person over 40 pounds or who has reached the upper weight limit for the forward-facing car seat must use a booster seat until he/she is four feet nine inches tall or age eight and the adult belt properly fits.[4] A person who is taller than four feet nine inches or eight years of age or older must be properly secured with a safety belt or harness that meets the requirements under ORS 815.055. In accordance with ORS 811.210 and 811.215 vehicles in excess of 10,000 pounds used for student transportation are exempt from statutory requirements unless they have been equipped with lap belts. Vehicles in excess of 10,000 pounds that have been equipped with lap belts must meet child car seat requirements as set forth in law.

School buses carrying students will be considered extensions of the school experience. All students using school transportation will abide by the code of conduct posted in each school bus or school activity vehicle. Violations of such code, as well as other conduct which is improper or which jeopardizes the safety of self or others, will be reported by the school bus driver to the supervisor. The transportation supervisor will, as soon as possible, inform the appropriate principal of such occurrence. Violators may be denied use of transportation for a period of time as deemed proper by the principal and transportation supervisor.

The principal or designee shall ensure transportation officials and drivers receive notification of students having special medical or behavioral protocols identified in student records.

Appropriate training related to specific protocols, including confidentiality requirements, will be provided to drivers.

The school bus driver will be responsible for the school bus at all times from departure until return. The driver will not participate in any activities that might impair his/her driving abilities.

[4] "Proper fit" means the lap belt of the safety belt or safety harness is positioned low across the thighs and the shoulder belt is positioned over the collarbone and away from the neck.

The district will comply with all state and federal laws and regulations pertaining to school bus transportation.

END OF POLICY

Legal Reference(s):

ORS 327.006
ORS 327.033
ORS 327.043
ORS 332.405
ORS 332.415
ORS 339.240 to-339.250
ORS 343.155 to-343.246
ORS 343.533
ORS 343.155 to-343.243
ORS 811.210
ORS 811.215
ORS 815.055
ORS 815.080
ORS 820.100 to-820.190
OAR 581-021-0050 to-0075
OAR 581-022-1530
OAR 581-023-0040
OAR 581-053-0002
OAR 581-053-0003
OAR 581-053-0004
OAR 581-053-0010
OAR 581-053-0031
OAR 581-053-0040
OAR 581-053-0053
OAR 581-053-0060
OAR 581-053-0070
OAR 581-053-0210
OAR 581-053-0220
OAR 581-053-0230
OAR 581-053-0240
OAR 735-102-0010

No Child Left Behind Act of 2001, 20 U.S.C. §§ 6315, 7912.

Elementary and Secondary Education Act (ESEA) Flexibility Waiver, July 18, 2012.

McKinney-Vento Homeless Education Assistance Improvements Act of 2001, 42 U.S.C. §§ 11431-11435 (2005).

Cross Reference(s):

EEAC - School Bus Safety Program

EEACC - Student Conduct on School Buses

Appendix B- 581-023-0040 Approved Transportation Costs

581-023-0040
Approved Transportation Costs for Payments from the State School Fund

(1) Definitions for the purpose of this rule:

(a) “Elementary School Student” means, notwithstanding any other OAR or statute, pupils attending a school offering only an elementary curriculum, any combination of grades K through 8;

(b) “Secondary School Student” means, notwithstanding any other OAR or statute, pupils attending a school offering any secondary curriculum for grades 9, 10, 11, or 12. Additionally, all students attending a school designated by the local school board through board action as a junior high school or middle school may be considered secondary students;

(c) “Local School Board” means, notwithstanding any other OAR or statute, the local school board for the district in which the student’s legal residence is physically located. Local school boards are not required to provide transportation for students who have requested and received approval to attend a school other than that designated by the local school board for students living in their specified attendance area;

(d) “Manufacturer’s Rated Capacity” means the number of students to be used in the calculations specified in paragraph (5)(n)(B) of this rule and described below:

(A) Buses transporting only elementary students will have a passenger capacity as stated on the manufacturer’s identification plate;

(B) Buses transporting only high school students, grades 9 through 12 will have a passenger capacity based on two students for each 39 inch bus seat;

(C) Buses transporting mixed groups from grades K–12 (in any combination) or groups of only junior high or middle school students will have a passenger capacity based on 2.5 students for each 39-inch bus seat.

“EXAMPLE: A bus with a manufacturer’s passenger capacity stated on the identification plate of 72 would have the following ratings: elementary — 72, high school only — 48, mixed groups — 60, middle school and junior high school — 60.”

(e) “Mile(s) from School” means the distance a student lives from school, measured from the closest, reasonable, and prudent point between the school property identified by the local board for that pupil’s attendance and the property where the pupil lives. The distance will be measured over the shortest practicable route on maintained public roadways or over existing pedestrian facilities or pedestrian facilities capable of meeting the requirements listed in ORS 332.405(4);

(f) “Patron” means any individual, organization, or entity that is able to use student transportation services except for charter schools (as defined in ORS 338) or a public agency (described in ORS 339.133(4),

ORS 327.527, ORS 327.540 or ORS 327.390) if the school or agency reimburses school districts up to one hundred percent (100%) of incurred transportation costs pursuant to ORS 338.145, 339.133(4), ORS 327.527, ORS 327.540 or 327.390.

(g) “Supplemental Plan” means a plan adopted by local school board resolution identifying groups or categories of students who live within the 1 and 1.5 mile limitations and require transportation based on health or safety reasons, including special education. Supplemental plan approvals may be ordered by the State Board of Education or its designated representatives. The State Board shall have the right of final review of any actions regarding supplemental plans. Appeals will be directed to the State Board for final consideration. The Plan must include the following:

(A) The approximate number of students to be transported based on the plan;

(B) The health or safety reasons cited for providing transportation;

(C) The local board resolution specifying the supplemental plan as submitted; and

(D) Any additional information or documentation supporting the supplemental plan deemed appropriate locally.

(h) “Alternative Transportation,” and “Active Transportation costs” have the definitions given in ORS 327.033.

(i) “Suitable and sufficient” means transportation that is appropriate for a particular student or group of students based on:

(A) The age of the student;

(B) The physical or mental capabilities of the student;

(C) The distance the student is to be transported; and

(D) The safety of the student to be transported.

(2) Approved transportation costs shall include those costs incurred in transporting pupils to and from instructional programs during the regularly scheduled school term within the limitations specified by ORS 327.006 and 327.033. Approved transportation costs may include costs incurred in transporting students participating in extended school year programs eligible for funding from the State School Fund.

(3) Approved transportation costs shall include those district expenditures associated with:

(a) Home-to-school transportation of elementary school pupils who live at least one mile from school;

(b) Home-to-school transportation of secondary school pupils who live at least one and one-half miles from school;

(c) Transportation of pupils between educational facilities either within or across district boundaries, if the facilities are used as part of the regularly-scheduled instructional program approved by the Board;

(d) Transportation of pupils for in-state field trips when such represents an extension of classroom activities for instructional purposes, and shall include out-of-state destinations within 100 miles of the Oregon border;

(e) Transportation of pupils home to school for whom a supplemental plan has been approved by the State Board of Education in addressing safety, health, and special education needs;

(f) Transportation of preschool children in Early Childhood Special Education Services having an Individual Family Service Plan requiring transportation and preschool children receiving Early Intervention Services under the authority of ORS 343.533.

(g) School to home transportation following extended school day instructional programs for:

(A) Elementary school pupils who live at least one mile from school;

(B) Secondary school pupils who live at least one and one-half miles from school.

(h) For the 2020-21 school year, maintaining an adequate level of pupil transportation services while school districts are administering Comprehensive Distance Learning in response to the COVID-19 pandemic.

(4) Approved Alternative Transportation costs:

(a) Include those district expenditures associated with:

(A) The facilitation of Active Transportation for human-powered forms of travel, including walking or bicycling, between home and school for students who live less than three miles from school. These costs may include:

(i) A pedestrian or bicycle group;

(ii) A crossing guard; or

(iii) Staff time required for coordinating active transportation options.

(B) The facilitation of Public Transportation between home and school for secondary school students. This may include staff time required for coordinating public transportation options.

(b) Require that new positions or extra duty opportunities created as a result of the implementation of Alternative Transportation will be direct employees of the school district.

(c) Do not include costs for transportation that is subcontracted by a school district to a private transportation provider.

(5) Approved transportation costs shall exclude those district expenditures associated with transportation for the following unless the school program is required under provisions of the Individuals with Disabilities Education Act, ORS 343.533 or 339.010 through 339.090 and 339.250:

(a) Pupils living within the limits prescribed in ORS 327.006(2) for whom no supplemental plan has been approved by the State Board;

(b) Activity trips other than for instructional purposes;

(c) Athletic trips;

(d) School lunch purposes;

(e) Summer school;

(f) Adult education;

(g) Evening school;

(h) Preschool and/or nursery school;

(i) Board and room in lieu of transportation associated with field trips;

(j) Transportation facility and staff costs other than those directly related to approved pupil transportation activities.

(6) The computation shall be made as follows:

(a) Pupil Transportation Salaries;

(b) Pupil Transportation Supplies, Equipment, Repairs, and Maintenance;

(c) All contracted Transportation;

(d) Travel of Pupil Transportation Personnel;

(e) Employee Benefits on Pupil Transportation Salaries;

(f) Pupil Transportation Insurance;

(g) Payments in Lieu of Transportation;

(h) Other Expenses of Pupil Transportation;

(i) Payments to Other Districts for Pupil Transportation;

(j) Leases and Rentals;

(k) Depreciation:

(A) Depreciation of Garage, but this shall not include land;

(B) Depreciation of Buses that are used at least 50% for reimbursable mileage.

(C) Shall include the costs to the district to retrofit, repower, or to replace as defined in ORS 468A.795, school buses for the purpose of reducing or eliminating diesel engine emissions. These costs:

(i) Shall not include the costs paid with moneys received from the state by a school district from the Clean Diesel Engine Fund that are described in 468A.801 (2)(a); and

(ii) Shall include costs to paid with moneys received from the state as allowed by the Environmental Mitigation Trust Agreement as defined in ORS 468A.801 (2)(c).

(l)Total of subsections (5)(a) through (k) of this rule;

(m) Deduct (if cost is included in detail above):

(A) Payments Received from Other Districts and from Patrons for reimbursable transportation;

(B) Non-reimbursable Transportation Costs:

(i) For 2021 – 22:

(I) Number of miles at $2.86 Per mile for all school buses and school activity vehicles having a manufacturers designed passenger capacity of greater than 20 persons including the driver, or

(II) Number of miles at $1.43 per mile for all school buses and school activity vehicles having a manufacturers' designed passenger capacity of 20 or less including the driver.

(ii) For 2022 – 23:

(I) Number of miles at $2.96 Per mile for all school buses and school activity vehicles having a manufacturers designed passenger capacity of greater than 20 persons including the driver, or

(II) Number of miles at $1.49 per mile for all school buses and school activity vehicles having a manufacturers' designed passenger capacity of 20 or less including the driver.

(iii) For 2023 – 24:

(I) Number of miles at $3.18 per mile for all school buses and school activity vehicles having a manufacturers' designed passenger capacity of greater than 20 persons including the driver, or

(II) Number of miles at $1.60 per mile for all school buses and school activity vehicles having a manufacturers' designed passenger capacity of 20 or less including the driver.

(iv) For 2024 – 25:

(I) Number of miles at $3.29 per mile for all school buses and school activity vehicles having a manufacturers' designed passenger capacity of greater than 20 persons including the driver, or

(II) Number of miles at $1.65 per mile for all school buses and school activity vehicles having a manufacturers' designed passenger capacity of 20 or less including the driver.

(v)(I) Those local school board certified marginal costs attributable to services provided to students who are not eligible for home-to-school transportation under section 3, calculated and documented as follows: Documentation maintained by local district shall include: bus and route identification, school(s) being served, number of eligible students on board, number of ineligible students on board;

(II) Calculation of marginal costs shall be as follows: District Cost Per Mile of bus operation divided by the total number of students transported on each bus to derive an average cost per student. The cost per student multiplied by the number of ineligible students and the number of miles transported provides the amount for deduction. Example: Cost per student = district cost per bus mile - number of students on bus; Total Deduction = cost per student x ineligible students x number of miles transported.

(III) No deduction will be made for transportation inside prescribed limits if the local board certifies student demographics would require student bus rides to or from school of more than one hour if the bus is routed in a manner making it accessible to the number of eligible students living outside the prescribed mileage limit equal to 130 percent of the bus manufacturer's rated capacity; or

(IV) The local school board certifies that buses are routed in a manner to serve at least the number of eligible students living outside the prescribed mileage limits equal to 130 percent of the bus manufacturer's rated passenger capacity; and

(V) In either of the aforementioned situations, no additional costs have been incurred by the district for the identified service.

(C) State and Federal Receipts for Transportation, except those apportioned under ORS 327.006 or third party Medicaid payments for transportation, if used to support expenditures in subsections (5)(a) through (l) of this rule;

(D) Rental or Lease Payments from Private Contractors;

(E) The percentage of transportation facility depreciation commensurate with the percentage of the total district fleet value based upon purchase price (see subsection (6)(k) of this rule) represented by non-pupil transportation equipment. Examples of nonpupil transportation equipment would include the following: lawnmowers, tractors, backhoes, trucks, pickups, cars, trailers, snow blowers, etc.

(n) Total Deductions ((5)(m)(A)+(m)(B)+(m)(C)+(m)(D)+ (m)(E));

(o) Approved Cost ((5)(l) minus (5)(n)).

(7) In the above computation, the following definitions apply:

(a) Pupil Transportation Salaries. Salaries and wages paid school bus drivers, assistants to driver, and that portion of salaries paid mechanics and other bus maintenance employees, supervisors of transportation, secretarial and clerical assistants, and persons assigned transportation oversight and coordination responsibilities attributable to the transportation program and documented through position descriptions and payroll records. No school district General Administration salaries may be included in this area;

(b) Pupil Transportation Supplies, Equipment, Repairs, and Maintenance. Costs of fuel, oil, lubricants, tires, tire repair, batteries, vehicle diagnosis and repair equipment identified as capital expenditures in the "Program Budget Manual," vehicle repair parts and supplies, repair of vehicles by other than the school district, garage maintenance and operation, and garage equipment repair and maintenance;

(c) All Contracted Transportation. Payments to parents and independent public or private contractors for transporting pupils from home to school, between educational facilities and for non-reimbursable activities enumerated in paragraph (6)(l)(B) of this rule; and fares to public carriers for transporting pupils from home to school and between educational facilities:

(A) If a district retains ownership of buses and garages and contracts for the operation of the transportation system with provision in the contract for lease or rental of the buses and garages, the contracted transportation cost shown should reflect the gross bid including the lease or rental payment. The lease or rental payment shall be deducted in the computation as reported in paragraph (5)(n)(D) of this rule;

(B) If the district retains ownership of buses and garages and participates in a transportation cooperative or consortium through an intergovernmental agreement, depreciation apportionment provided under ORS 327.033 will be disbursed directly to the district. No depreciation component is approved for cooperative-owned buses or garages.

(d) Travel of Pupil Transportation Personnel. Meals, lodging, mileage, per diem and other travel expenses of pupil transportation personnel, and private car mileage if paid to bus drivers for travel to and from the point where school bus is parked if other than the central garage. The same travel expenses plus tuition or registration are included for attendance at Department of Education sponsored or presented pupil transportation training programs and seminars;

(e) Employee Benefits on Pupil Transportation Salaries. The district's contributions for employee benefits including social security and retirement, employee health insurance, workers' compensation, and unemployment insurance;

(f) Pupil Transportation Insurance. Payments for public liability and property damage, medical care, collision, fire and theft, and insurance on garages and shops;

(g) Payments in Lieu of Transportation. Payments for pupils' board and room in lieu of transportation, consistent with ORS 332.405(2);

(h) Other Expenses of Pupil Transportation. District-paid fees for school bus drivers' physical examinations; interest on bus or garage contracts payable including lease-purchase agreements if capitalized (see subsection (6)(k) of this rule);

(i) Payments to Other In-State or Out-of-State Districts for Transportation. Payments to other districts for approved pupil transportation costs;

(j) Leases and Rentals. Rental or lease payments for the use of land or buildings used for approved pupil transportation. Rental or lease payments for buses operated by district personnel for approved pupil transportation.

“NOTE: Only those leases which do not contain an option to purchase or application of rentals to purchase should be included in subsection (5)(j) of this rule. See subsection (6)(k) of this rule as to the proper treatment of other lease-purchase agreements.”

(k) Depreciation. For purposes of computing depreciation, capitalized cost is defined to include the unit cost of the asset, exclusive of interest, for such assets purchased outright, by conventional contract, or by lease-purchase agreement if such agreement contains any provision to acquire ownership at the end of the agreement by application of a portion of the rentals paid or a terminal payment. The computation of the capitalized cost and the depreciation shall be according to the following:

(A) Portions of Garages and Other Buildings Used for Approved Pupil Transportation:

(i) Outright purchase (including purchase by conventional contract). For each outright purchase or purchase by conventional contract, each district shall report to the Oregon Department of Education, on the forms provided, the unit cost of the garage or other building purchased and the dollar amount of interest payments associated with such purchase. The purchase of land shall not be included in the Garage Depreciation. The capitalized value shall represent the unit cost, exclusive of interest. Depreciation shall be computed at an annual rate of four percent;

(ii) Lease-purchase agreements. For each lease-purchase agreement, the district shall report to the Oregon Department of Education, on the forms provided, the dollar amount of the agreement, the interest payments contained in the agreement, and the schedule of such interest payments contained in the agreement. Land shall not be included in the lease purchase agreement for the purpose of reimbursement. Subsequent to July 1, 1975, the capitalized value shall represent the lease-purchase price less any interest payments contained in the agreement. Depreciation shall be computed at an annual rate of four percent.

(B) Buses and Other Vehicles Used for Approved Pupil Transportation:

(i) Outright purchase (including purchase by conventional contract). For each outright purchase or purchase by conventional contract, each district shall report to the Oregon Department of Education, on the forms provided, the unit cost of the vehicle(s) purchased and the dollar amount of interest payments associated with such purchase. The capitalized value shall represent the unit cost, exclusive of interest. Depreciation shall be computed at an annual rate of ten percent;

(ii) Lease-purchase agreements. For each lease-purchase agreement, the district shall report to the Oregon Department of Education, on the forms provided, the dollar amount of the agreement, any applicable trade-in value, the dollar amounts of interest payments contained in the agreement, and the schedule of such interest payments contained in the agreement. The capitalized value of the vehicles shall represent the lease-purchase price including the trade-in allowance less interest payments contained in the agreement. Depreciation shall be computed at an annual rate of ten percent;

(iii) Lease agreements. If the district is leasing its buses under a lease agreement, the district shall report the annual lease cost. A lease agreement as used in this paragraph means an agreement whereby the lessor retains title to the buses being leased to the lessee school district and the title to the buses is never received by the lessee. Under such a lease agreement, the use of the buses by the lessee is limited by the term of the lease. If there is an auxiliary agreement either written or oral whereby at the end of the lease term, the title of the buses shall pass to the lessee school district, the agreement is not a lease

agreement as described in this paragraph but is a lease-purchase agreement as outlined in subparagraph (ii) of this paragraph. The lease payment made by a school district obtaining the use of buses pursuant to a lease as defined in this paragraph shall be used in the computation of the reimbursement in place of the depreciation set forth in subparagraphs (i) and (ii) of this paragraph.

(C) Deductions:

(i) Payments Received from Other Districts and from Patrons. Money received from other school districts, parents, guardians, or students for transportation if paid in support of expenditures listed in subsections (5)(a) through (l) of this rule;

(ii) Nonreimbursable Transportation Costs. Actual bus mileage of excludable trips shall include the actual mileage in district owned or contracted buses for transportation for activity trips, athletic trips, school lunch purposes, summer school, adult education, evening school, nursery school, and any other nonreimbursable purposes. Such mileage shall be deducted at the rate indicated in subsection (5)(m)(B) of this rule. The rate of deduction may be reviewed periodically by the State Board of Education and adjusted accordingly;

(iii) State and Federal Receipts for Transportation. All state and federal receipts for transportation expenditures, exclusive of funds apportioned under ORS 327.006 and 327.033, that have been included in subsection (5)(a) through (l) of this rule;

(iv) 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. This item must be shown as Revenue Code 1930 in the school district audit and the gross payments to the contractor must be included in subsection (5)(c) of this rule.

(8) Each district shall maintain a record, by purpose, of total pupil transportation miles and shall submit a report of such to the Oregon Department of Education on the form provided. The accuracy of such records shall be certified by the district clerk.

(9) If an education service district offers a special service under the provisions of section (4) of ORS 334.175, including home-to-school transportation that would qualify for reimbursement under the provisions of ORS 327.006 if provided by a local school district, the following procedure in crediting the transportation expenditure to the local district may be employed:

(a) The education service district shall compute approved home-to-school transportation costs as provided in section (4) of this rule;

(b) The approved costs so determined shall be billed to and paid by each of the local school districts. The expenditure shall be accounted for by the local district as a transportation expenditure paid to another education agency;

(c) The audited district expenditure shall be recognized by the State Superintendent of Public Instruction in computing the local district’s entitlement under ORS 327.006;

(d) If the education service district reimburses the local district the difference between that portion billed and that paid under ORS 327.006, such reimbursement — if derived from property tax sources by

education service district resolution — shall not be deducted by the state in determining the local district's approved costs. The local district shall account for the education service district reimbursement as other general receipts are accounted for from the education service district.

(10) For purposes of computing board and room entitlement for a district operating a dormitory under provisions of ORS 327.006, the state assumes responsibility for its proportionate share of costs associated with the provision of food, facilities, staff, operation, and maintenance necessary to provide students with safe and healthy living conditions. The state does not assume responsibility for costs associated with recreation or entertainment of students. The approved cost against which the computation is made for state liability shall not exceed the limit stated in ORS 332.405. In addition, the state will assume its proportionate share of the cost of field trips as defined in subsection (3)(c) of this rule.

(11) The computation of approved expenditures for board and room entitlement shall be made as follows:

(a) Salaries;

(b) Operation:

(A) Utilities;

(B) Supplies;

(C) Other Operational Costs.

(c) Maintenance:

(A) Upkeep;

(B) Replacement.

(d) Fixed Charges:

(A) Employee Benefits;

(B) Other Fixed Charges.

(e) Food;

(f) Operation of Buses and Other Vehicles — Supplies, Repairs and Maintenance;

(g) Depreciation:

(A) Dormitory;

(B) Buses and Other Vehicles.

(h) Total Expenditures (Sum of subsections (10)(a) through (g) of this rule));

(i) Deductions (subtract if cost is included in cost above):

(A) Payments Received from Other Districts and from Patrons;

(B) Nonreimbursable Transportation Costs as indicated in subsection (5)(m)(B) of this rule;

(C) State and Federal Receipts for Transportation, except those apportioned under ORS 327.006, 327.033, or third party Medicaid payments, if used to support expenditures in subsections (10)(a) through (g) of this rule;

(D) Federal School Lunch, Breakfast, and Milk Reimbursements;

(E) Sales of Food.

(j) Total Deductions (sum (10)(i)(A) + (i)(B) + (i)(C) + (i)(D) + (i)(E));

(k) Approved Cost ((10)(h) minus (10)(j) of this rule).

(12) The items included in the board and room entitlement computation are defined as follows:

(a) Salaries. Salaries and wages paid dormitory personnel, including the dormitory manager, cooks, custodians, and other personnel directly concerned with operation of the dormitory, and that portion of salaries paid secretarial and clerical assistants and other personnel attributable to the dormitory program;

(b) Operation:

(A) Utilities. Heat for buildings, water and sewage, electricity, telephone, and other utilities necessary for the operation of the dormitory;

(B) Supplies. Custodial supplies, supplies for care of grounds, linens, and other supplies necessary for the operation of the dormitory including food services. Purchase of food is included in subsection (11)(e) of this rule;

(C) Other Operational Costs. Contracted custodial services, window washing, laundry or linen services, etc., necessary for the operation of the dormitory.

(c) Maintenance:

(A) Upkeep. Expenditures associated with maintaining the existing dormitory facilities in a safe, healthy, and efficient condition, including supplies and materials for upkeep of dormitory grounds and the dormitory building. Costs associated with maintenance of recreational or entertainment facilities are excluded;

(B) Replacement of Equipment. Expenditures associated with replacing equipment necessary to the safe, healthy, and efficient operation of the dormitory. Replacement of equipment used for recreational or entertainment purposes are excluded.

(d) Fixed Charges:

(A) Employee Benefits. Expenditures for dormitory employees' benefits including social security and retirement, employee health insurance, workers' compensation, and unemployment insurance;

(B) Other Fixed Charges. Expenditures for property insurance, liability insurance, rental of land and buildings for purposes associated with operation of the dormitory, and other fixed charges directly attributable to operation of the dormitory.

(e) Food. Expenditures for food necessary for the operation of the dormitory;

(f) Operation of Buses and Other Vehicles — Supplies, Repairs, and Maintenance. Expenditures for fuel, oil, lubricants, tires, tire repair, batteries, vehicle repair parts and supplies, repair of vehicles by other than the school district, garage maintenance and operation, and garage equipment repair and maintenance necessary for the operation of buses utilized for purposes stated in section (3) of this rule and of other vehicles necessary for the operation of the dormitory;

(g) Depreciation:

(A) Dormitory. For purposes of computing dormitory depreciation, capitalized cost is defined as the unit cost of the asset (including the cost of original equipment), exclusive of interest, plus the cost of substantial improvements or remodeling. The purchase of land shall not be included. Costs associated with providing recreational or entertainment facilities are not included. Depreciation shall be computed at an annual rate of four percent;

(B) Buses and Other Vehicles. Depreciation for buses used for approved pupil transportation and that portion of other vehicles necessary for operation of the dormitory shall be computed in accordance with the formula and definition stated in paragraph (6)(k)(B) of this rule.

(h) Total. Sum of subsections (10)(a) through (g) of this rule;

(i) Deductions:

(A) Payments Received from Other Districts and from Patrons. Money received from other school districts, parents, guardians, or students for transportation or room and board if paid in support of expenditures listed in subsections (10)(a) through (f) of this rule;

(B) Nonreimbursable Transportation Costs. Costs for nonreimbursable transportation according to the formula and definition stated in paragraph (6)(l)(B) of this rule;

(C) State and Federal Receipts for Transportation. All state and federal receipts for transportation or room and board expenditures exclusive of funds apportioned under ORS 327.006 that have been included in subsections (10)(a) through (f) of this rule;

(D) Federal School Lunch, Breakfast, and Milk Reimbursements. All federal receipts for school lunch, breakfast, and milk expenditures that have been included in subsections (10)(a) through (f) of this rule;

(E) Sales of Food. Money received from teachers, students, or other individuals from food sales for which the expenditures are included in subsections (10)(a) through (f) of this rule.

(13) Beginning with the 2024-25 school year, school districts may request a waiver and/or supplemental plan to include Alternative Transportation as a reimbursable expense under their Transportation Grant. In order to include Alternative Transportation costs as a reimbursable expense, school districts must:

(a) Submit a proposed or revised supplemental plan and/or waiver for their district that includes explanations of the alternative transportation methods to be used.

(b) Demonstrate that the inclusion of Alternative Transportation will result in Transportation Grant expenses that are equal to or less than planned expenses without Alternative Transportation, or demonstrate that costs exceeding this amount will be paid from a source other than the transportation grant from the State School Fund.

(c) Document the local community engagement that was conducted to develop the plan for Alternative Transportation.

(d) For Alternative Transportation plans that include Public Transportation, districts must demonstrate that:

(A) No other transportation options, including Active Transportation options, are suitable and sufficient;

(B) They have made a good faith effort to recruit, hire, train, retain and pay transportation positions at competitive wages consistent with collective bargaining agreements and were unable to hire a sufficient workforce to ensure reliable service by a school bus and timely transport of students to and from school.

(e) School districts shall resubmit their supplemental plans and/or waivers for the inclusion of Alternative Transportation to be reauthorized by the State Board of Education every two years.

(f) Notwithstanding subsections (13)(a-e) of this section, a school district that, prior to the effective date of July 1, 2024, had been receiving reimbursement for costs incurred in providing transit passes under a supplemental plan or a waiver shall continue to receive reimbursement under the terms and conditions the school district was receiving reimbursement prior to the effective date of July 1, 2024 unless the State Board of Education and the school district agree otherwise.

(14) Approved Alternative Transportation costs shall include costs identified in or aligned with the plan presented in their request for a waiver and/or supplemental plan that has been approved by the State Board of Education.

(a) The Department may reimburse estimated Alternative Transportation costs during the school year the costs are incurred based on estimates provided by the school district, and then reconcile to actual costs the following school year.

(b) The Department shall not reimburse Alternative Transportation costs that exceed 5% of the school district’s total Transportation Grant for the concurrent school year.

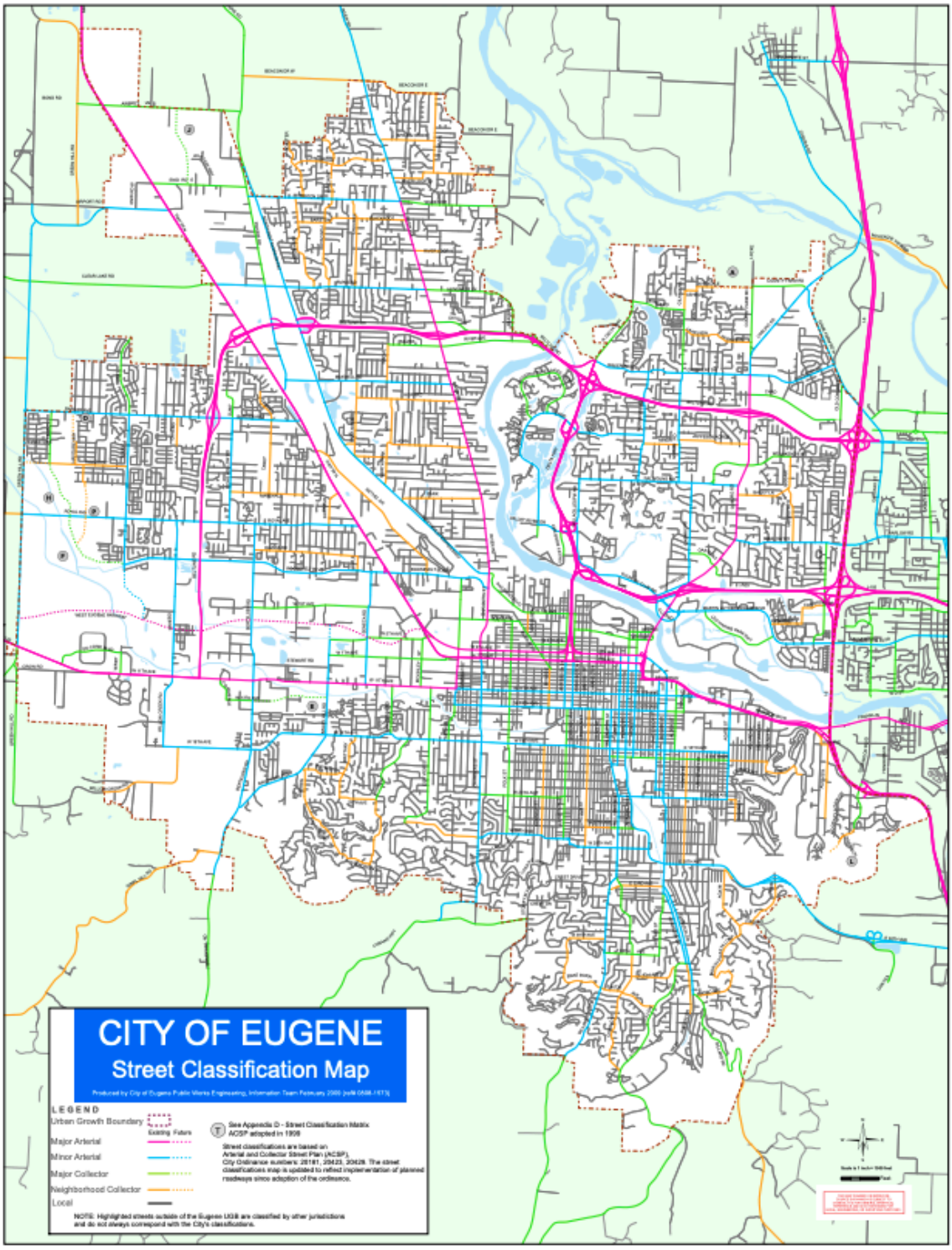
(15) Such items of expenditure as may be questionable in applying the policy stated in this administrative rule shall be resolved by the State Superintendent of Public Instruction and such determination shall be final.

(16) Apportionment of the State School Fund for 2001–02 and subsequent years.

Statutory/Other Authority: ORS 327.013 & ORS 820.100 - 820.120
Statutes/Other Implemented: ORS 327.013 & ORS 820.100 - 820.120
History:
ODE 4-2024, amend filed 02/16/2024, effective 02/16/2024
ODE 51-2022, amend filed 10/26/2022, effective 10/26/2022
ODE 4-2021, amend filed 01/28/2021, effective 01/28/2021
ODE 38-2020, temporary amend filed 09/18/2020, effective 09/18/2020 through 03/16/2021
ODE 2-2020, amend filed 02/27/2020, effective 02/28/2020
ODE 4-2018, amend filed 02/21/2018, effective 02/21/2018
ODE 46-2016, f. & cert. ef. 11-1-16
ODE 4-2016, f. & cert. ef. 2-5-16
ODE 39-2014, f. & cert. ef. 9-3-14
ODE 22-2011, f. & cert. ef. 12-15-11
ODE 6-2010, f. & cert. ef. 4-26-10
ODE 8-2008, f. & cert. ef. 3-21-08
ODE 10-2006, f. & cert. ef. 2-21-06
ODE 9-2003, f. & cert. ef. 6-13-03
ODE 25-2001, f. & cert. ef. 11-7-01
ODE 9-2000, f. & cert. ef. 4-5-00
EB 4-1997, f. & cert. ef. 4-25-97
EB 21-1993, f. & cert. ef. 6-2-93
EB 3-1992, f. & cert. ef. 2-21-92
EB 42-1988, f. & cert. ef. 11-15-88
EB 32-1987, f. & ef. 12-10-87
EB 4-1987, f. & ef. 2-20-87
1EB 5-1986, f. 1-30-86, ef. 2-1-86
1EB 1-1985, f. 1-4-85, ef. 1-7-85
1EB 17-1983, f. 11-23-83, ef. 11-25-83
1EB 15-1982, f. 8-4-82, ef. 8-5-82
1EB 4-1982, f. & ef. 2-10-82
1EB 6-1981, f. 3-2-81, ef. 3-3-81
1EB 10-1980, f. & ef. 5-5-80
1EB 4-1978, f. 1-27-78, ef. 1-27-78
1EB 233, f. 6-11-76, ef. 6-18-76
1EB 220, f. 2-17-76, ef. 3-15-76
1EB 209, f. 12-5-75, ef. 1-16-76
1EB 181, f. 1-17-75, ef. 7-1-75
1EB 177, f. 10-2-74

Appendix C- Road Classification Map

Link: [City of Eugene: Road Classification Ma]



Appendix D- Evaluation for Walk Area

School	Region	Location of Hazard	Total Score	HAZARD ?	Hazard for Elem	Hazard for Mildd	Street Safety	Crossing Safety	LCOG Crash Data	Speed Limit	Type of Street	Slow Emergency Response	Lane Width	Lighting	Other Conditions	Reason for Other Condition Points	Additional Notes
Adams	Churchill	Willamette St. between 19th & 25th	27	Yes	HAZARD	FALSE	0	7	10	1	5	0	2	0	2	Non-perpendicular intersections, heavy commercial use on Willamette	3 points removed for lights at 24th and 25th
Adams	Churchill	W 28th Ave - Chambers to Lincoln (Lu	29	Yes	HAZARD	FALSE	0	10	10	1	5	0	2	0	1	Non-perpendicular intersections. Would like to see crossing at Adams, Taylor	
Adams	Churchill	W 28th Ave - Friendly to Jefferson	26	No	FALSE	FALSE	0	7	10	1	5	0	2	0	1	Non-perpendicular intersections. Would like to see crossing at Adams, Taylor	
Adams	Churchill	18th- Willamette to Jefferson Chambers (25th -27th) (West side)	28	Yes	HAZARD	FALSE	0	8	10	3	5	0	2	0	0		
Adams			26	No	FALSE	FALSE	0	10	3	5	5	0	2	0	1	Hill leads to increased	No crashes
ATA	Churchill	18th - Lincoln to Buick	27	No	HAZARD	FALSE	0	5	10	3	5	0	2	0	2	High traffic volume, heavy commercial use	
ATA	Churchill	7th - Chambers to Van Buren	32	Yes	HAZARD	HAZARD	0	5	10	3	7	0	5	0	2	Part of Hwy system, high traffic volume	
ATA	Churchill	6th - Tyler to Taylor	32	Yes	HAZARD	HAZARD	0	5	10	3	7	0	5	0	2	Part of Hwy system, high traffic volume	
Awbrey Park	North	Spring Creek Dr.	17	No	FALSE	FALSE	8	5	0	0	2	0	1	0	1	Long, straight stretch with no breaks encourages speeding	
Awbrey Park	North	River Rd - Blackfoot Ave- Beacon Dr	35	Yes	HAZARD	HAZARD	0	7	10	7	7	0	4	0	0		
Awbrey Park	North	Beacon Dr - River Road to Futura	34	Yes	HAZARD	HAZARD	15	5	0	5	2	0	1	3	3	Curves/terrain, secluded, Other: comes off a high speed road	
Awbrey Park	North	Beacon Dr - Futura to Scenic	26	No	FALSE	FALSE	9	5	1	5	2	0	1	0	3	Curves/terrain, secluded, Other:	
Awbrey Park	North	Beacon Dr - Scenic to South of Hilem	37	Yes	HAZARD	HAZARD	15	5	0	7	2	0	1	3	4	Curves/terrain, secluded, Other: comes off a high speed road, and zero visibility	
Awbrey Park	North	Beacon Dr - South of Hileman to Riv	30	Yes	HAZARD	FALSE	10	5	0	7	2	0	1	3	2	secluded, Other: comes off a high speed road,	
Awbrey Park	North	River Lp #2	28	Yes	HAZARD	FALSE	10	5	0	5	2	0	1	3	2	Secluded, Other: long, straight road with no interruption encourages speeding	No lighting at Banner, Kendall, Kirsten
Camas	South	30th	25	No	FALSE	FALSE	0	2	10	5	5	0	3	0	0		
Camas Ridge	South	24th between Amazon Pkwy and Hilyi	20	No	FALSE	FALSE	0	1	10	3	5	0	1	0	0		
Camas Ridge, Edgewood	South	East Amazon Dr	20	No	FALSE	FALSE	0	10	0	3	5	0	1	0	1	Unmarked crosswalks across minor arterials in the walk area	Sidewalk on one side with bark walking path on other

School	Region	Location of Hazard	Total Score	HAZARD ?	Hazard for Elem	Hazard for Midd	Street Safety	Crossing Safety	LCOG Crash Data	Speed Limit	Type of Street	Slow Emergency Response	Lane Width	Lighting	Other Conditions	Reason for Other Condition Points	Additional Notes
Camas Ridge, Edgewood	South	West Amazon Dr	19	No	FALSE	FALSE	0	8	0	3	5	0	2	0	1	Unmarked crosswalks across minor arterials in the walk area	
Camas Ridge, Roosevelt	South	Hilyard St between 28th and 33rd	26	No	FALSE	FALSE	0	4	10	3	5	0	3	0	1	Unmarked crosswalks across minor arterials in the walk area	3 points removed for traffic light. COE is working to reduce speed limit
Chavez	Churchill	W 11th Ave between City View and Je	28	Yes	HAZARD	FALSE	0	7	10	3	5	0	2	0	1	Unmarked crosswalks across minor arterials in the walk area	
Chavez	Churchill	W 13th Ave - Arthur to Madison	26	No	FALSE	FALSE	0	7	10	3	5	0	1	0	0		
Chavez	Churchill	7th - Chambers to Van Buren	34	Yes	HAZARD	HAZARD	0	7	10	3	7	0	5	0	2	Part of Hwy system, high traffic volume	
Chavez	Churchill	6th - Tyler to Taylor	34	Yes	HAZARD	HAZARD	0	7	10	3	7	0	5	0	2	Part of Hwy system, high traffic volume	
Chavez	Churchill	18th - Chambers to Hawkins	30	Yes	HAZARD	FALSE	0	8	10	3	5	0	2	0	2	High traffic volume, heavy commercial use at Chambers	
Chavez, ATA	Churchill	Chambers St - 18th-11th	27	Yes	HAZARD	FALSE	0	5	10	3	5	0	2	0	2	3points removed from crossing score because of traffic signal in front of school. Crossings are a little closer than every quarter mile and it's an arterial = 8 pts, with 3 points off for the traffic signal controlled crossing in front of school. Unmarked crosswalks across minor arterials in the walk area, personal safety issues on the Fern Ridge/Chambers pedestrian underpass	
Chavez, ATA	Churchill	Chambers St - 18th-25th	29	Yes	HAZARD	FALSE	0	7	7	3	5	0	6	0	1	Unmarked crosswalks across minor arterials in the walk area	3points removed from crossing score because of traffic signal controlled crossings
Edgewood	South	Willamette St - 37th to Spencer's Cre	31	Yes	HAZARD	FALSE	1	7	7	7	5	0	1	3	0		Crash data is accounting for 2 blocks in either direction, assuming that students will cross at the light

School	Region	Location of Hazard	Total Score	HAZARD ?	Hazard for Elem	Hazard for Midd	Street Safety	Crossing Safety	LCOG Crash Data	Speed Limit	Type of Street	Slow Emergency Response	Lane Width	Lighting	Other Conditions	Reason for Other Condition Points	Additional Notes
Edgewood	South	Fox Hollow crossing safety	15	No	FALSE	FALSE	1	5	1	1	3	0	1	0	3	Curves, high speed because of hill, shoulder used by bikes so not very useable for walking	Speed limit just lowered to 25
Edgewood / Camas Ridge	South	East Amazon Dr	20	No	FALSE	FALSE	0	10	0	3	5	0	1	0	1	Unmarked crosswalks across minor arterials in the walk area	Sidewalk on one side with bark walking path on other
Edgewood / Camas Ridge	South	West Amazon Dr	19	No	FALSE	FALSE	0	8	0	3	5	0	2	0	1	Unmarked crosswalks across minor arterials in the walk area	
Edison, Roosevelt	South	Hilyard st (15th-20th)	30	Yes	HAZARD	FALSE	0	8	10	3	5	0	2	0	2	Unmarked crosswalks across minor arterials in the walk area	COE is working on reducing speed limit. Not removing points for traffic lights because of high number of turning motions
Edison, Roosevelt	South	Hilyard st (20th-23nd)	22	No	FALSE	FALSE	0	10	0	3	5	0	2	0	2	Unmarked crosswalks across minor arterials in the walk area	
Edison		Franklin Blvd - 11th-Agate	33	Yes	HAZARD	HAZARD	0	2	10	5	7	0	6	0	3	Very high volume of all modes of traffic, part of highway system, bus line down middle of road	
Gilham	Sheldon	Gilham Rd Creekside Way-Ayres Rd	25	No	FALSE	FALSE	10	5	1	3	2	0	1	3	0		
Gilham, Cal Young	Sheldon	Green Acres Rd - (N Delta Rd to Nork	30	No	HAZARD	FALSE	0	7	10	5	5	0	2	0	1	Unmarked crosswalks across minor arterials in the walk area	This will be lowered soon, hopefully.
Gilham, Cal Young	Sheldon	Crescent Ave (Norkenzie to Coburg)	27	Yes	HAZARD	FALSE	0	8	10	1	5	0	2	0	1	Unmarked crosswalks across minor arterials in the walk area	
Gilham, Cal Young	Sheldon	Coburg Rd - Beltline and north	31	Yes	HAZARD	FALSE	0	10	1	5	7	0	6	0	2	Unmarked crosswalks across minor arterials in the walk area, bend in the road	Not dropping score because of traffic lights because of high # of turning motions.

School	Region	Location of Hazard	Total Score	HAZARD ?	Hazard for Elem	Hazard for Midd	Street Safety	Crossing Safety	LCOG Crash Data	Speed Limit	Type of Street	Slow Emergency Response	Lane Width	Lighting	Other Conditions	Reason for Other Condition Points	Additional Notes
Holt, Monroe	Sheldon	Arcadia	19	No	FALSE	FALSE	10	5	1	0	0	0	0	3	0		
Holt, Monroe	Sheldon	Harlow	28	Yes	HAZARD	FALSE	0	5	10	5	5	0	2	0	1	Unmarked crosswalks across minor arterials in the walk area	3 points off crossing safety because of traffic light in front of school
Howard, Kelly, YG	North	Howard Ave	25	No	FALSE	FALSE	8	5	7	1	2	0	1	0	1	Cars, trash cans and other obstacles on shoulder of road	
Howard, River Road, Kelly	North	Horn at Maclay to River Road	20	No	FALSE	FALSE	9	5	0	1	2	0	1	0	2	Long straight stretch, trash cans on shoulder	Around the curve, the inside shoulder often disappears under debris.
Howard, River Road, Kelly	North	Northpark from Cornwall to NW Expre	22	No	FALSE	FALSE	9	5	1	1	2	0	1	0	3	Long straight stretch, trash cans on shoulder, comes off NW Expressway	Stretches where shoulder disappears.
Howard, YG	North	Maxwell Rd	30	Yes	HAZARD	FALSE	0	7	10	5	5	0	2	0	1	Long straight stretches encourage speeding	
Howard	North	River Road	37	Yes	HAZARD	HAZARD	0	7	10	5	7	0	4	3	1	Long, straight stretches encourage speeding	
Kelly	North	Maxwell Rd	28	No	HAZARD	FALSE	0	5	10	5	5	0	2	0	1	Long straight stretches encourage speeding	
Kelly	North	River Road	35	Yes	HAZARD	HAZARD	0	5	10	5	7	0	4	3	1	Long, straight stretches encourage speeding	
Kelly, River Road, Howard	North	Horn at curve between Rosy to Oak	25	No	FALSE	FALSE	10	5	0	1	2	0	1	3	3	Curves, long straight stretches encourage speeding, shrubs on southeast side of curve and northwest side of Horn/Lake intersection significantly impact visibility	
Kennedy	Churchill	Bertleson - Bailey Hill to 18th	34	Yes	HAZARD	HAZARD	10	10	1	7	5	0	1	0	0		
Kennedy	Churchill	Bertleson - 18th to 11th.	31	No	HAZARD	FALSE	1	10	3	7	5	0	2	3	0		No lighting at Churchill Meadows

School	Region	Location of Hazard	Total Score	HAZARD ?	Hazard for Elem	Hazard for Midd	Street Safety	Crossing Safety	LCOG Crash Data	Speed Limit	Type of Street	Slow Emergency Response	Lane Width	Lighting	Other Conditions	Reason for Other Condition Points	Additional Notes
Kennedy, Twin Oaks	Churchill	Bailey Hill- Bertleson to Klouts	33	Yes	HAZARD	HAZARD	6	10	1	7	5	0	1	3	0		
Kennedy	Churchill	W 11th Ave - Bailey to Beltline	33	Yes	HAZARD	HAZARD	0	3	10	5	7	0	6	0	2	High traffic volume, heavy commercial use	
Kennedy	Churchill	Warren - Summit Terrace north to nor	17	No	FALSE	FALSE	10	0	0	0	2	0	0	3	2	Curves/terrain, steep grade	
Kennedy	Churchill	W 18th Ave - Bertleson to Bailey Hill	29	No	HAZARD	FALSE	0	10	7	3	5	0	4	0	0		
Kennedy	Churchill	W 18th Ave - Bailey Hill to Buck Stree	27	No	HAZARD	FALSE	0	5	10	3	5	0	4	0	0		Crossing at light at Brittany brings down crossing score
Madison	North	River Rd - Irvington to past Lynnbrook	34	Yes	HAZARD	HAZARD	0	5	10	7	7	0	4	0	1		
Madison	North	River Lp #1 - River Road to Alameda	28	No	HAZARD	FALSE	9	5	1	5	2	0	1	3	2	Curves/terrain, secluded	
Madison	North	River Loop 1/Wilkes Alameda to Beac	28	No	HAZARD	FALSE	10	5	0	7	0	0	1	3	2	Long straight stretches encourage speeding; curves/terrain	
Madison	North	Wilkes between Madison and River R	29	No	HAZARD	FALSE	4	5	10	5	3	0	1	0	1	Long straight stretch with no stop signs or signals encourage speeding	
Madison	North	Hunsaker	29	No	HAZARD	FALSE	8	5	7	1	3	0	1	0	4	Heavy Commercial, Deliniators keep getting hit inidicating crash risk, Coming off highway at high speeds, obstacles in shoulder	
McCornack	Churchill	Bailey Hill Rd north of 18th	32	Yes	HAZARD	HAZARD	0	10	10	5	5	0	2	0	0		Not taking off points because of lots of turning motions at 18th and Bailey Hill - it's a high crash intersection.
McCornack	Churchill	W 18th Ave - Josh St to City View	32	YES	HAZARD	HAZARD	0	10	10	3	5	0	4	0	0		
Monroe	Sheldon	Coburg Rd - south of Beltline	30	No	HAZARD	FALSE	0	2	10	5	7	0	6	0	0		
Monroe	Sheldon	Harlow	26	No	FALSE	FALSE	0	3	10	5	5	0	2	0	1	Unmarked crosswalks across minor arterials in the walk area	3 points off crossing safety because of traffic light in front of school

School	Region	Location of Hazard	Total Score	HAZARD ?	Hazard for Elem	Hazard for Midd	Street Safety	Crossing Safety	LCOG Crash Data	Speed Limit	Type of Street	Slow Emergency Response	Lane Width	Lighting	Other Conditions	Reason for Other Condition Points	Additional Notes
Monroe	Sheldon	Oakway Rd	31	No	HAZARD	FALSE	0	7	7	5	5	0	5	0	2	Non-perpendicular intersections, lots of commercial activity near Coburg	
Monroe, Gilham	Sheldon	Gilham Rd south of Beltline	25	No	FALSE	FALSE	0	8	1	5	5	0	2	3	1	Unmarked crosswalks across minor arterials in the walk area	Generally good lighting, but none at Sally
Monroe, Gilham	Sheldon	Gilham Rd north of Beltline to Cresce	25	No	FALSE	FALSE	0	8	1	5	5	0	2	3	1	Unmarked crosswalks across minor arterials in the walk area	Lighting could be poor at striped crossing in front of school
Monroe, Holt	Sheldon	Willakenzie Rd - east of Coburg	25	No	FALSE	FALSE	0	5	10	3	3	0	4	0	0		
River Road/El Camino	North	River Road	37	Yes	HAZARD	HAZARD	0	7	10	5	7	0	4	3	1	Long, straight stretches encourage speeding	
Roosevelt	South	Amazon Parkway	24	No	FALSE	FALSE	0	10	3	5	5	0	1	0	0		
Spring Creek, Madison	North	Irving	34	No	HAZARD	HAZARD	0	10	10	5	5	0	2	0	2	Long straight stretch with no stop signs or signals encourage speeding, comes off NW Expressway with people travelling high speeds	Not removing points because there's only 1 light.
Spring Creek, Madison	North	River Road	37	Yes	HAZARD	HAZARD	0	7	10	5	7	0	4	3	1	Long, straight stretches encourage speeding	
Spring Creek, Madison	North	Irvington	25	No	FALSE	FALSE	0	10	3	5	5	0	1	0	1	Long, straight stretches encourage speeding	
Twin Oaks	Churchill	Spencer Creek Rd/Lorane Hwy	35	Yes	HAZARD	HAZARD	8	5	3	7	3	3	1	3	2	It's a highway. Rural, very high speed road.	
Twin Oaks	Churchill	Bailey Hill Rd	32	Yes	HAZARD	HAZARD	8	5	0	7	3	3	1	3	2	Very high speed, little expectation of people walking or biking	
WillaG	Sheldon	Willagillespie	24	No	FALSE	FALSE	0	2	10	5	5	0	2	0	0		
Cal Young	Sheldon	Norkenzie from Green Acres to Beltlir	30	No	HAZARD	FALSE	0	10	7	5	5	0	2	0	1	Unmarked crosswalks across minor arterials in the walk area	

School	Region	Location of Hazard	Total Score	HAZARD ?	Hazard for Elem	Hazard for Midd	Street Safety	Crossing Safety	LCOG Crash Data	Speed Limit	Type of Street	Slow Emergency Response	Lane Width	Lighting	Other Conditions	Reason for Other Condition Points	Additional Notes
Willagillespie	Sheldon	Cal Young from Willagillespie to Nork	19	No	FALSE	FALSE	0	7	0	5	5	0	2	0	0		
Willagillespie	Sheldon	Goodpasture from Delta Highway to N	25	No	FALSE	FALSE	1	10	0	5	5	0	1	3	0		

Oregon State Board of Education
June 13, 2024

AGENDA ITEMs: 4.K., 4.L., and 4.M.

SUBJECT: Supplemental Plan Revision for Eugene SD, Bend-La Pine SD, & Ontario SD **STAFF NAME & OFFICE**: Brock Dittus, Pupil Transportation & Fingerprinting The districts have submitted a new supplemental plan for board approval. This will change the areas in which transportation will be provided / required for students who live within the statutory minimum for transportation.	☐ **Informational Presentation** ☒ **Written Report**

BACKGROUND

In 1991 the Oregon Legislature added a requirement, and funding, to provide transportation to school students who live a certain distance from their elementary or secondary school. The distances established coincide to the previous limit at which students were required to attend school prior to Oregon's Compulsory School Law.

The legislature also recognized that students who live closer than these prescribed limits may also require transportation due to health or safety reasons, so ORS 327.043 allows for a "supplemental plan" that must be approved by the State Board of Education.

Other than the legislative guidance that the transportation must be for "health or safety" reasons, the State Board has traditionally allowed local school districts to determine areas within their district that require transportation within the distance limits.

In 1992, many districts submitted supplemental plans for approval from the State Board, and all were adopted. Having an approved supplemental plan does two things:

1. It allows a school district to be reimbursed as part of the transportation grant of the state school fund; and
2. It requires transportation to be provided by the district. In other words, the district can't stop providing this transportation without the approval of a new plan.

The State Board does have the discretion to approve or not approve supplemental plans. The Pupil Transportation Unit does ensure that plans presented to the board present a health or safety reason for the plan.

A supplemental plan must be approved by the local school board prior to presentation to the State Board for approval. The District Boards approved these supplemental plans at their regular meetings and submitted the plan to ODE for approval thereafter.

The supplemental plan submitted by these school districts account for attendance boundary changes within the walk distance areas. Proponents and opponents of the submitted plan had the opportunity to be heard at the local level. These plans replace or supplement the previous plans.

Oregon State Board of Education
June 13, 2024

AGENDA ITEMs: 4.K., 4.L., and 4.M.

SUMMARY OF PREVIOUS BOARD ACTION

The State Board approved Eugene School District's original supplemental plan in 1992, with revisions in 1994, 1997, 2004, and 2005.

The State Board approved Bend-La Pine School District's original supplemental plan in 1992, with revisions in 1999, 2001, 2003, 2005, 2010, 2015, 2016, and 2019.

The State Board aproved Ontario School District's original supplemental plan in 1992, with revisions in 2004, 2005, and 2006.

POLICY ISSUE OR CONCERNS

The School Districts submitted a supplemental plan for State Board approval after the local school boards adopted them during sessions open to the public. ODE does not engage with stakeholders regarding these plan revisions separate from the district's public process.

In this case, the districts are updating their plans to account for students who would otherwise be required to walk in dangerous conditions due to speed and/or volume of vehicle traffic, width and condition of street, lack of shoulders or sidewalks suitable to walking, poor visibility, and dangerous crossings or intersections, among other hazards.

EQUITY IMPACT ANALYSIS

ODE does not conduct a separate analysis of a supplemental plan adopted by a local school board except to verify that the supplemental plan is being submitted for health or safety reasons as required by statute.

FISCAL ANALYSIS

There is no fiscal analysis because supplemental plans do not usually have a significant impact on agency funds. There is no requirement for ODE to act as a result of this action. There may be a very small change in impact to the State School Fund Transportation Grant as a result of providing this transportation; however, in most cases the buses / routes that will be transporting these students will pick them up on their way in from other mandated transportation areas around the district.

Adoption of these plans will not have an effect on any other school district, and will allow the districts to be reimbursed at their current rate for the transportation of these students as part of their transportation grant.

ATTACHMENTS

Attachment 1: Eugene SD Supplemental Plan
Attachment 2: Eugene SD board minutes indicating local approval
Attachment 3: 2024 Bend La Pine Supplemental Plan Update

Oregon State Board of Education
June 13, 2024
AGENDA ITEMs: 4.K., 4.L., and 4.M.

Attachment 4: 2024 Bend La Pine Board Approval
Attachment 5: Ontario SD Supplemental Plan
Attachment 6: Ontario SD School Board Approval (Meeting Minutes)

BEND LA PINE SCHOOLS

Administrative School District No. 1

RESOLUTION NO. 1964: Approval of Supplemental Transportation Plans

WHEREAS a hazard exists to students attending and potentially walking to the schools listed below and illustrated on the attached maps; and

WHEREAS the State of Oregon will support transportation services for elementary students who live within one mile of an elementary school and secondary students who live within one- and one-half miles of a middle or high school when significant safety hazards are present; then

WHEREAS the approximate number of students affected by the plans is as follows:

School	Approximate Affected students
La Pine Elementary School **General Area Description:** East of Huntington and South of Caldwell Drive North of Bimart West of 97	19
La Pine Middle School **General Area Description:** East of Huntington and South of Caldwell Drive North of Bimart West of 97	11
La Pine High School **General Area Description:** East of Huntington and South of Caldwell Drive North of Bimart West of 97	9

BE IT RESOLVED the Board of Directors of Administrative School District No. 1 (Bend-La Pine Schools) hereby approves the attached supplemental transportation plans.

Moved by: Amy Tatom Seconded by: Cameron Fischer

Yes votes: 4 No votes: 0

Dated this 14 day of May, 2024

Signed: _____
Chair

_____
~~Vice Chair~~ Director

Attest: _____
Board Secretary

Est. 1883
BEND LAPINE Schools
TRANSPORTATION

Supplemental Plan for: LAPINE ES #4

Bend-LaPine School District

Resolution Date: 5/6/24

Approximated number of Students: 19 Date Counted: 5/6/24

Elementary Schools have 1 mile walk boundary. Hazard Boundaries are outlined in Red.
Secondary Schools have 1.5 mile walk boundary. Hazard Boundaries are outlined in Red.

Hazard Condition:

High speeds no safe crossing for students

General Area Description:

East of Huntington Rd and south of Caldwell Dr. North of Bimart West of Hwy 97.



Est 1883
BEND LAPINE
Schools
TRANSPORTATION

Supplemental Plan for: LAPINE MS #4

Bend-LaPine School District

Resolution Date: 5/6/24

Approximated number of Students: 11 Date Counted: 5/6/24

Elementary Schools have 1 mile walk boundary. Hazard Boundaries are outlined in Red.
Secondary Schools have 1.5 mile walk boundary. Hazard Boundaries are outlined in Red.

Hazard Condition:

High speeds no safe crossing for students

General Area Description:

East of Huntington Rd and south of Caldwell Dr. North of Bimart West of Hwy 97.



Est. 1883
BEND LAPINE
Schools
TRANSPORTATION

Supplemental Plan for: LAPINE HS #4

Bend-LaPine School District

Resolution Date: 5/6/24

Approximated number of Students: 9 Date Counted: 5/6/24

Elementary Schools have 1 mile walk boundary. Hazard Boundaries are outlined in Red.
Secondary Schools have 1.5 mile walk boundary. Hazard Boundaries are outlined in Red.

Hazard Condition:

High speeds no safe crossing for students

General Area Description:

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Oregon State Board of Education
June 13, 2024

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Oregon State Board of Education
June 13, 2024
AGENDA ITEMs: 4.K., 4.L., and 4.M.

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Attachment 6: Ontario SD School Board Approval (Meeting Minutes)

Regular Meeting
Monday, May 20, 2024 7:00 PM Pacific

OSD - Board Room
195 SW Third Avenue
Ontario, OR 97914

I. **CALL TO ORDER**

II. **WELCOME TO VISITORS**

III. **FLAG SALUTE**

IV. **AGENDA CHANGES**

V. **CONSENT ITEMS:**

- V.1. Minutes
- V.2. Personnel
- V.3. Bills

VI. **REPORTS/RECOGNITION:**

- VI.1. OHS Student Report - Joanna Anguinano-Cisneros
- VI.2. OMS Student Report - Dorothy Torrato
- VI.3. NASDME Presentation - Itzel Hernandez Quinonez
- VI.4. May Licensed Staff Recognition
- VI.5. Board Bits
- VI.6. Finance Report - Devin Collins
- VI.7. Superintendent's Report - Nikki Albisu

VII. **PUBLIC COMMENTS:**

VIII. **BUSINESS:**

- VIII.1. Approval of OMLI Leadership Summit at EOU
- VIII.2. Approval of Transportation Supplemental Plan
- VIII.3. Approval of Eddie Melendrez on the Budget Committee
- VIII.4. Approval of the 2023-2024 Summer School Payroll
- VIII.5. Approval of First Reading of Policy BBFC
- VIII.6. Approval of First Reading of Policy CBG
- VIII.7. Approval of First Reading of Policy JGA

IX. **TOPICS FOR FUTURE MEETINGS**

Ontario
SCHOOL DISTRICT 8C

165 SW 3rd Ave.
Ontario, OR 97914
Phone: 541-889-5374

Transportation Supplemental Plan

OSD Board Adopted May 20, 2024/Effective August 16, 2024

Nicole Albisu, Superintendent
Shannon Widmer, Transportation Supervisor

Supplemental Plan for **Aiken** Elementary School

General Area
Hwy 201
NW 4th Ave.
SW 4th Ave.
N. Oregon St.

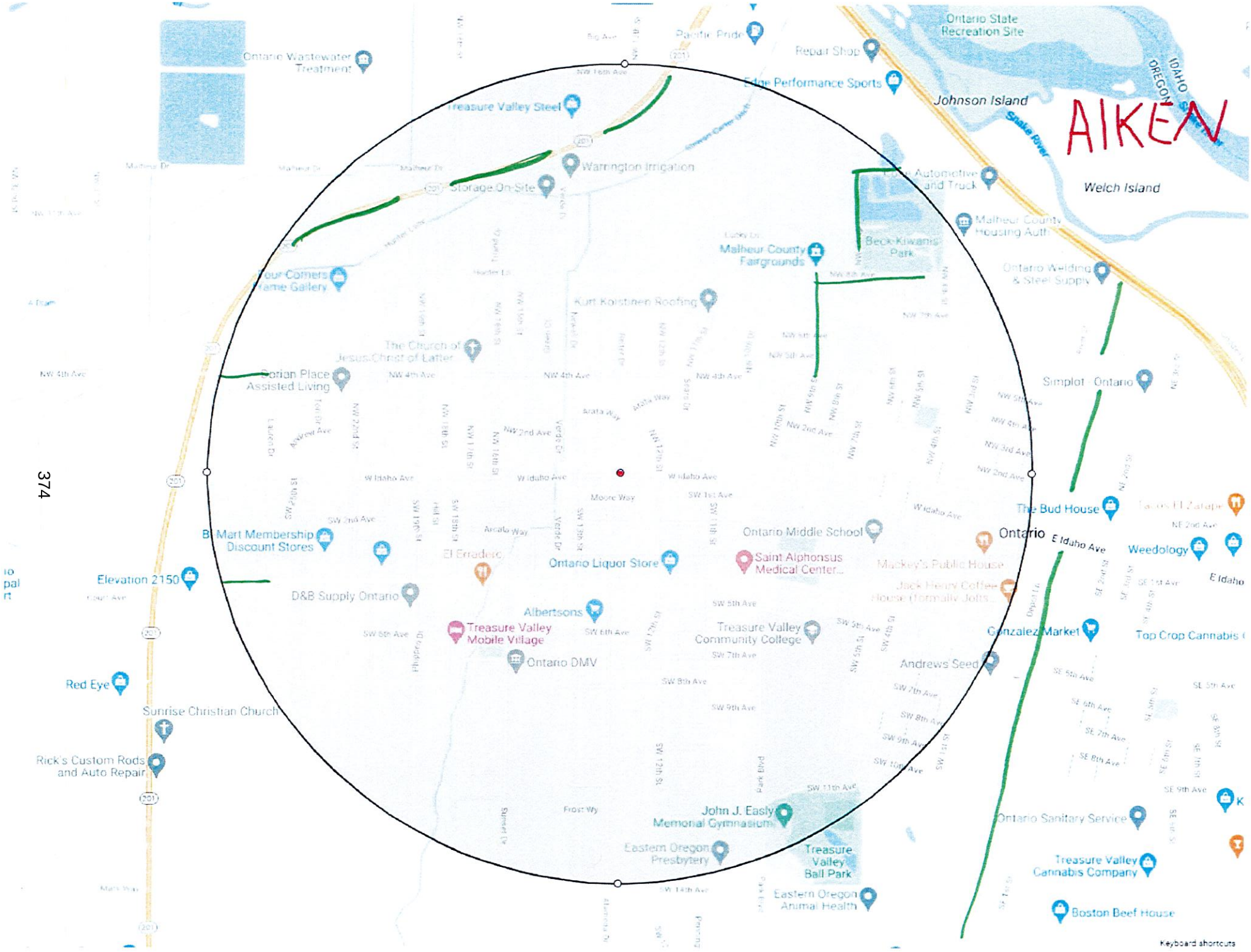
High traffic and no lighted crosswalks

General Area
8th Ave. NW
Fortner St.

No street lights or sidewalks

General Area
All area east of Union Pacific Railroad Tracks

Heavy traffic and high speed of trains


AIKEN
Ontario State Recreation Site
Johnson Island
Welch Island
Snake River
IDAHO
OREGON
Ontario Wastewater Treatment
Pacific Pride
Repair Shop
Edge Performance Sports
Treasure Valley Steel
Warrington Irrigation
Storage On-Site
Malheur County Fairgrounds
Beck-Kiwanis Park
Malheur County Housing Auth
Ontario Welding & Steel Supply
Four Corners Frame Gallery
Kurt Kolstrom Roofing
The Church of Jesus Christ of Latter
Dorian Place Assisted Living
Simplot - Ontario
The Bud House
Ontario
Weedology
B Mart Membership Discount Stores
El Erradero
Ontario Liquor Store
Ontario Middle School
Saint Alphonsus Medical Center...
Mickey's Public House
Elevation 2150
D&B Supply Ontario
Albertsons
Treasure Valley Mobile Village
Ontario DMV
Treasure Valley Community College
Gonzalez Market
Top Crop Cannabis
Andrews Seed
Red Eye
Sunrise Christian Church
Rick's Custom Rods and Auto Repair
John J. Easly Memorial Gymnasium
Ontario Sanitary Service
Eastern Oregon Presbytery
Treasure Valley Ball Park
Treasure Valley Cannabis Company
Eastern Oregon Animal Health
Boston Beef House
E Idaho Ave
W Idaho Ave
NW 4th Ave
SW 5th Ave
SW 8th Ave
SW 9th Ave
Keyboard shortcuts

Supplemental Plan for **May Roberts** Elementary School

General Area
Hwy 201
NW 4th Ave.
W. Idaho Ave.
I-84 Freeway
Oregon St.

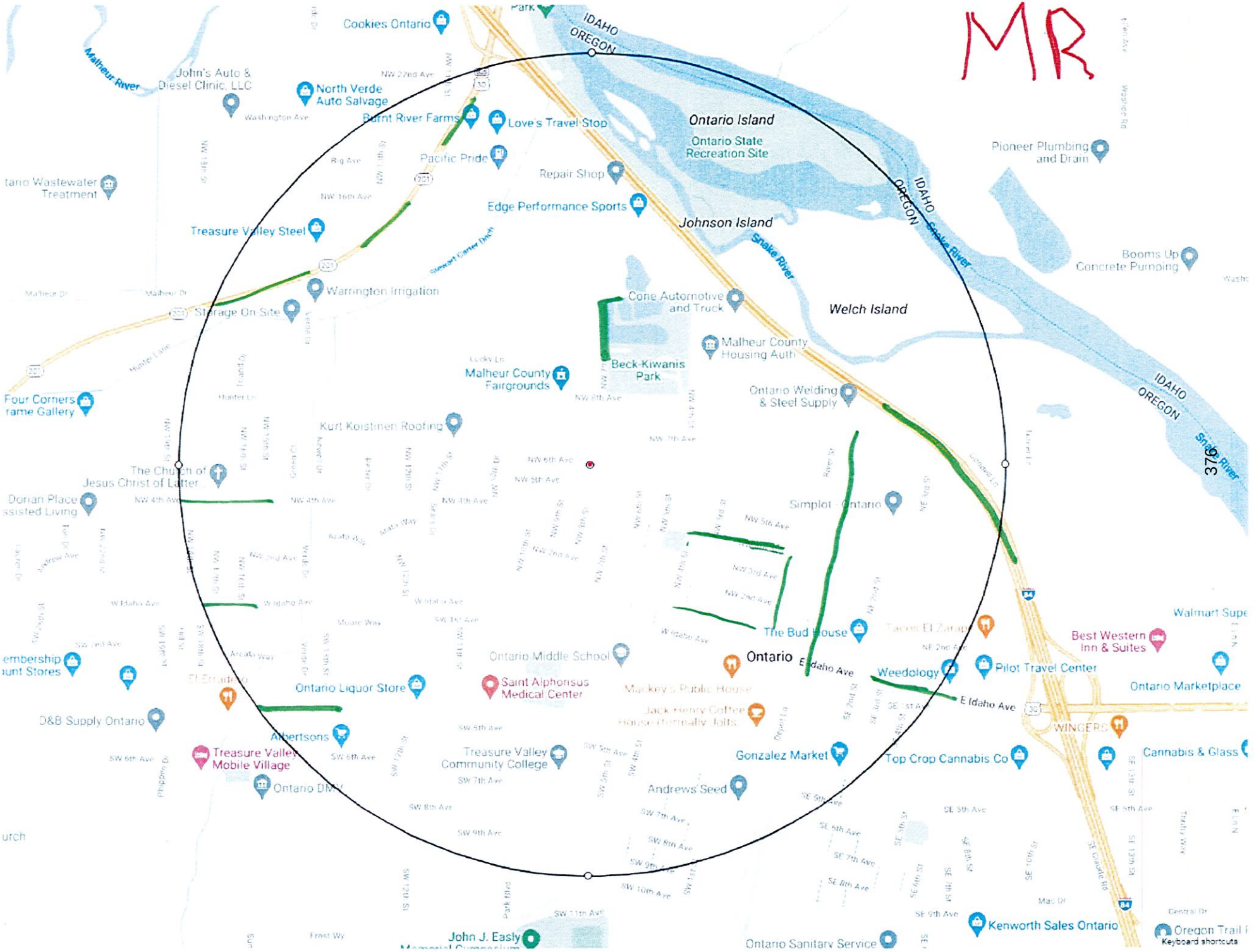
High traffic and speed

General Area
8th Ave. NW
Fortner St.

No street lights or marked sidewalks

General Area
All area east of Union Pacific Railroad Tracks

Heavy traffic and high speed of trains


MR
Cookies Ontario
Malheur River
John's Auto & Diesel Clinic, LLC
North Verde Auto Salvage
Burnt River Farms
Love's Travel Stop
Pacific Pride
Repair Shop
Edge Performance Sports
Treasure Valley Steel
Warrington Irrigation
Storage On Site
Ontario Island
Ontario State Recreation Site
Johnson Island
Welch Island
Snake River
IDAHO
OREGON
Pioneer Plumbing and Drain
Booms Up Concrete Pumping
Cone Automotive and Truck
Malheur County Housing Auth
Malheur County Fairgrounds
Beck-Kiwanis Park
Ontario Welding & Steel Supply
Four Corners rame Gallery
Kurt Korstinen Roofing
The Church of Jesus Christ of Latter
Dorian Place ssisted Living
Simplot - Ontario
The Bud House
Tacos El Zarape
Best Western Inn & Suites
Walmart Supe
Ontario Middle School
Ontario
E Idaho Ave
Weedology
Pilot Travel Center
Ontario Marketplace
Ontario Liquor Store
Saint Alphonsus Medical Center
Markey's Public House
Jack Henry Coffee House (formally Jolts)
WINGERS
D&B Supply Ontario
Albertsons
Treasure Valley Mobile Village
Ontario DMV
Treasure Valley Community College
Gonzalez Market
Top Crop Cannabis Co
Cannabis & Glass
Andrews Seed
Kenworth Sales Ontario
Oregon Trail
Keyboard shortcuts
John J. Easly
Ontario Sanitary Service
3780

Supplemental Plan for **Alameda** Elementary School

General Area
SW 4th Ave.
W Idaho Ave.

High traffic and speed

General Area
SW 18th Ave.
Alameda Dr.

No sidewalks and high traffic

General Area
All area east of Union Pacific Railroad Tracks

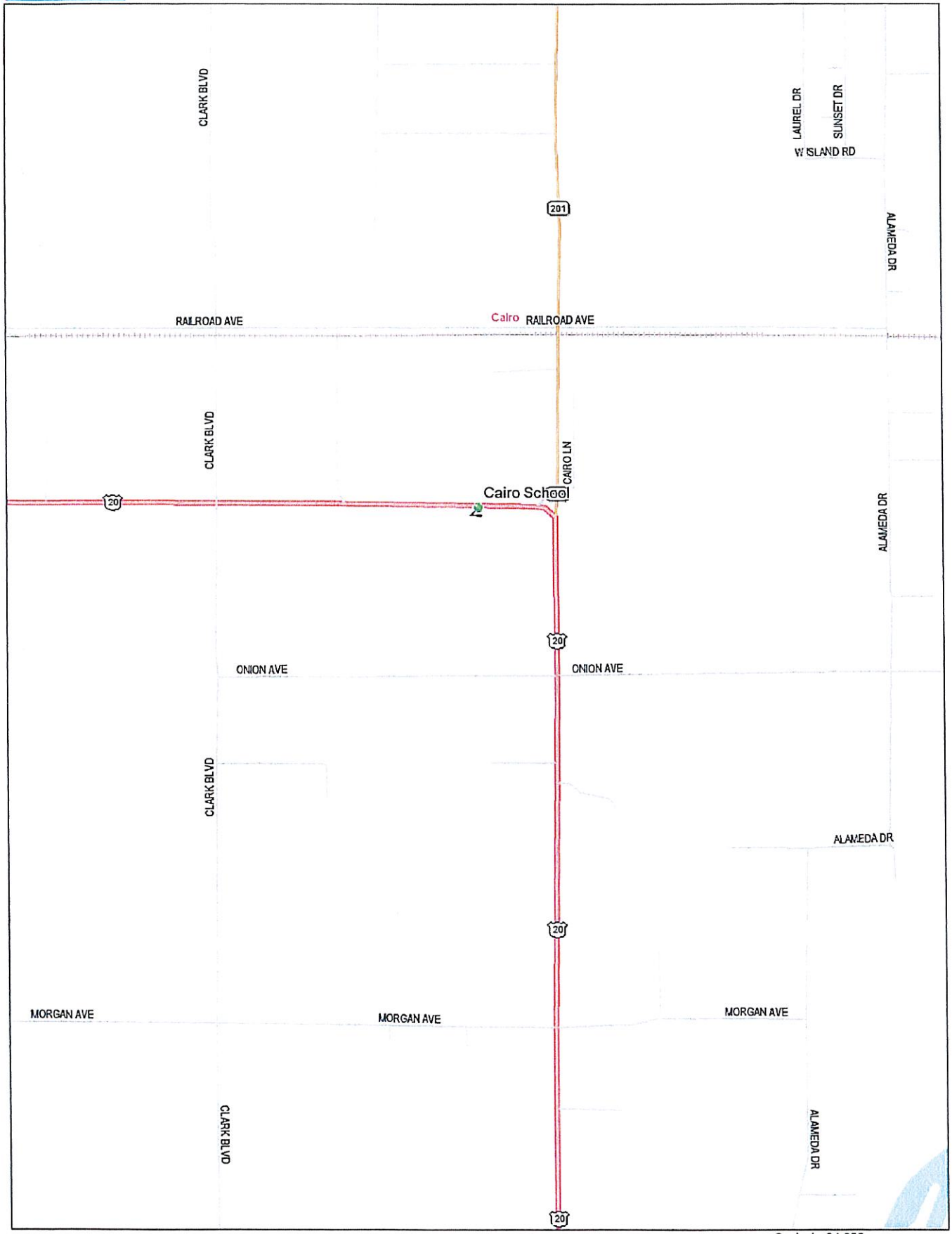
Heavy traffic and high speed of trains


The Church of Jesus Christ of Latter...
Dorian Place Assisted Living
Simplot - Ontario
The Bud House
Tacos El Zarape
Ontario
Weedology
Bi-Mart Membership Discount Stores
Ontario Middle School
Elevation 2150
El Erradero
Ontario Liquor Store
Saint Alphonsus Medical Center...
Markey's Public House
Jack Henry Coffee House (formally Jolt's...
D&B Supply Ontario
Albertsons
Treasure Valley Mobile Village
Treasure Valley Community College
Gonzalez Market
Top Crop Cannab
Ontario DMV
Andrews Seed
Red Eye
Sunrise Christian Church
Rick's Custom Rods and Auto Repair
John J. Easly Memorial Gymnasium
Ontario Sanitary Service
Eastern Oregon Presbytery
Treasure Valley Ball Park
Treasure Valley Cannabis Company
Eastern Oregon Animal Health
Boston Beef House
Campbell Tractor Company
Calvary Chapel Ontario
Simplot Grower Solutions
Precision Automotive & Machine Shop
Roadrunner Towing
United Grain Corporation
Sun Guard Window Tinting
Top Onions USA
Keyboard shortcuts
378
Alameda

Supplemental Plan for **Cairo** Elementary School

All students within the one-mile limit will be transported.

Hazardous traffic conditions
No adequate walkways



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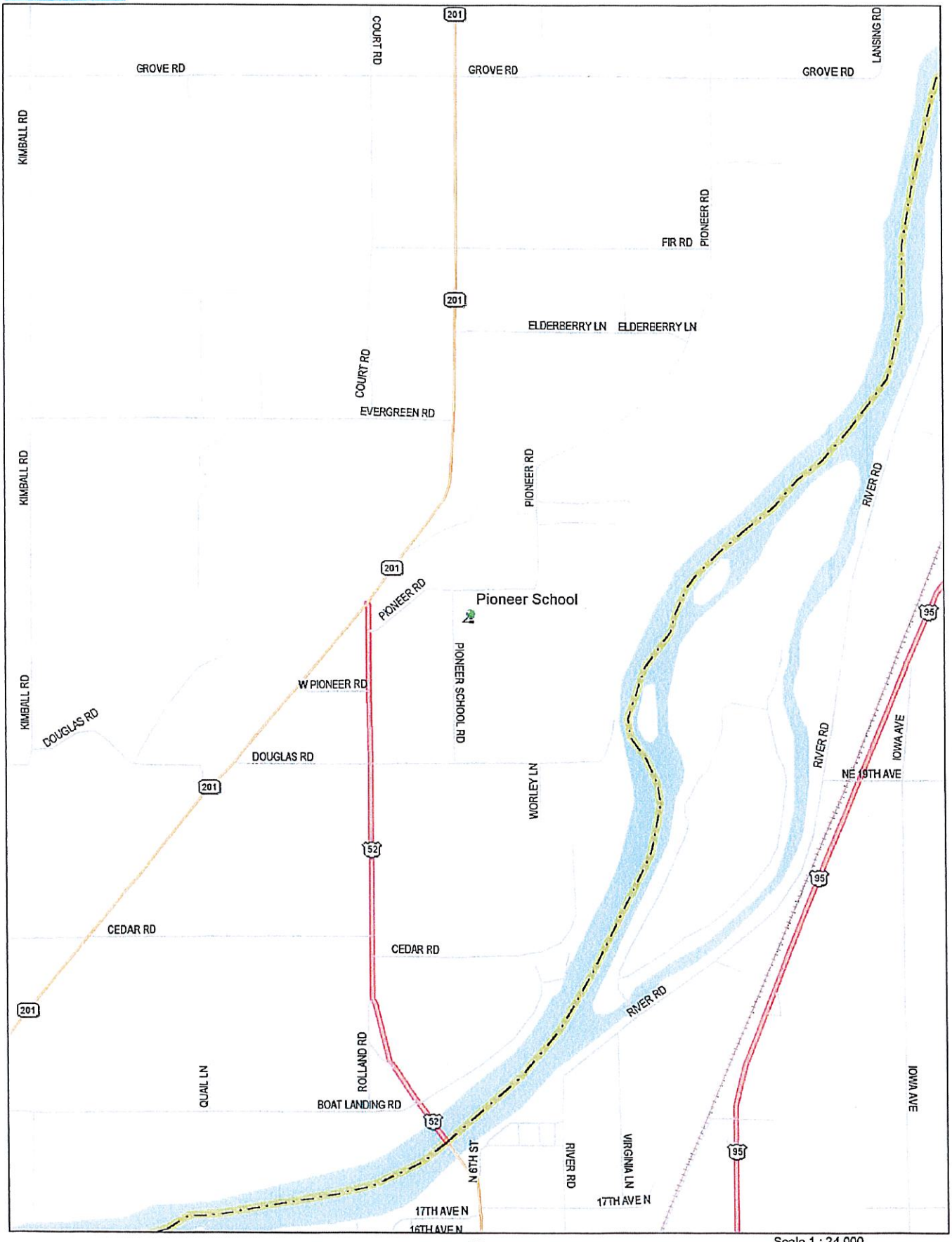
TN
MN (15.7°E)

Scale 1 : 24,000
0 600 1200 1800 2400 3000 ft
0 200 400 600 800 1000 m
1" = 2,000.0 ft Data Zoom 13-1

Supplemental Plan for **Pioneer** Elementary School

All students within the one-mile limit will be transported.

Hazardous traffic conditions
No adequate walkways



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www.delorme.com

TN
MN (15.7°E)

Scale 1 : 24,000

1" = 2,000.0 ft Data Zoom 13-1

Supplemental Plan for **6th-8th**

General Area
All areas east of Union Pacific Railroad Tracks
NW 4th Ave.
W Idaho Ave.
SW 4th Ave.
Alameda Dr.

High traffic
High speed of trains on railroad tracks

General Area
North Oregon
NW 4th Ave.
NW 16th St.
SW 18th Ave.
Alameda Dr.

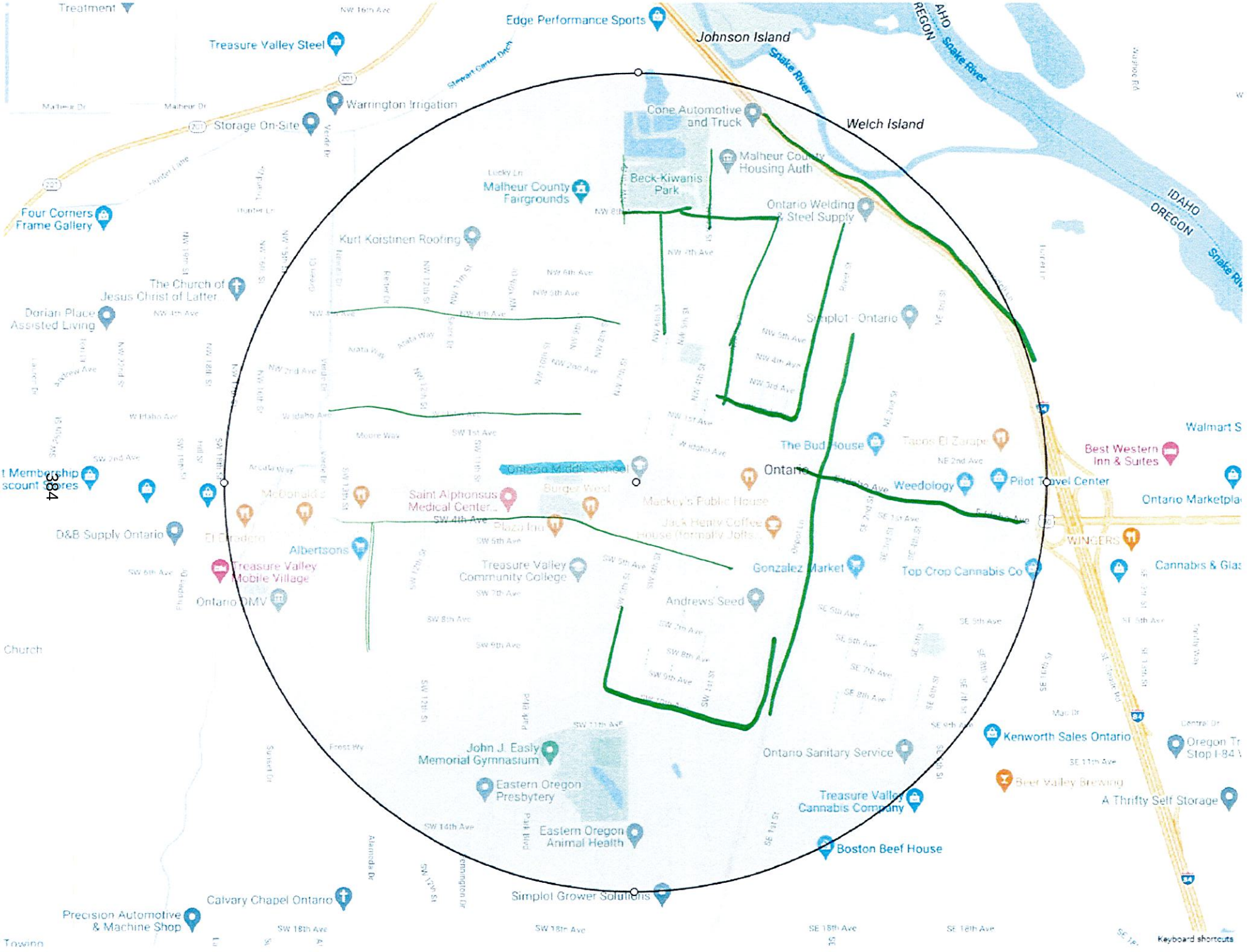
Unimproved connectors

General Area
SW 10th Ave. to 580 S Oregon St.

No lights and/or crosswalks

General Area
All students K-8 who live more than one mile from school will be offered transportation.

Change will impact approximately 180 students in district. K-8 transportation will enable students to navigate general and specific home-to-school/school-to-home safety barriers in an equitable manner.


Treatment
Treasure Valley Steel
Warrington Irrigation
Storage On-Site
Four Corners Frame Gallery
Edge Performance Sports
Johnson Island
Snake River
IDAHO
OREGON
Cone Automotive and Truck
Welch Island
Malheur County Housing Auth
Beck-Kiwanis Park
Malheur County Fairgrounds
Ontario Welding & Steel Supply
Kurt Korstinen Roofing
The Church of Jesus Christ of Latter...
Dorian Place Assisted Living
Simplot - Ontario
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Tacos El Zarape
Best Western Inn & Suites
Ontario Middle School
Ontario
Weedology
Pilot Travel Center
Ontario Marketpla
Saint Alphonsus Medical Center...
Burger West
Mickey's Public House
Jack Henry Coffee House (Formally Jolts...
D&B Supply Ontario
Albertsons
Treasure Valley Mobile Village
Ontario DMV
Treasure Valley Community College
Gonzalez Market
Top Crop Cannabis Co
WINGERS
Cannabis & Glas
Andrews Seed
John J. Easly Memorial Gymnasium
Eastern Oregon Presbytery
Eastern Oregon Animal Health
Ontario Sanitary Service
Kenworth Sales Ontario
Beer Valley Brewing
Treasure Valley Cannabis Company
A Thrifty Self Storage
Boston Beef House
Simplot Grower Solutions
Calvary Chapel Ontario
Precision Automotive & Machine Shop
Church
Walmart S
Keyboard shortcuts

384

Supplemental Plan for **9th-12th**

General Area
All areas east of Union Pacific Railroad Tracks
NW 4th Ave.
W Idaho Ave.
SW 4th Ave.
Alameda Dr.

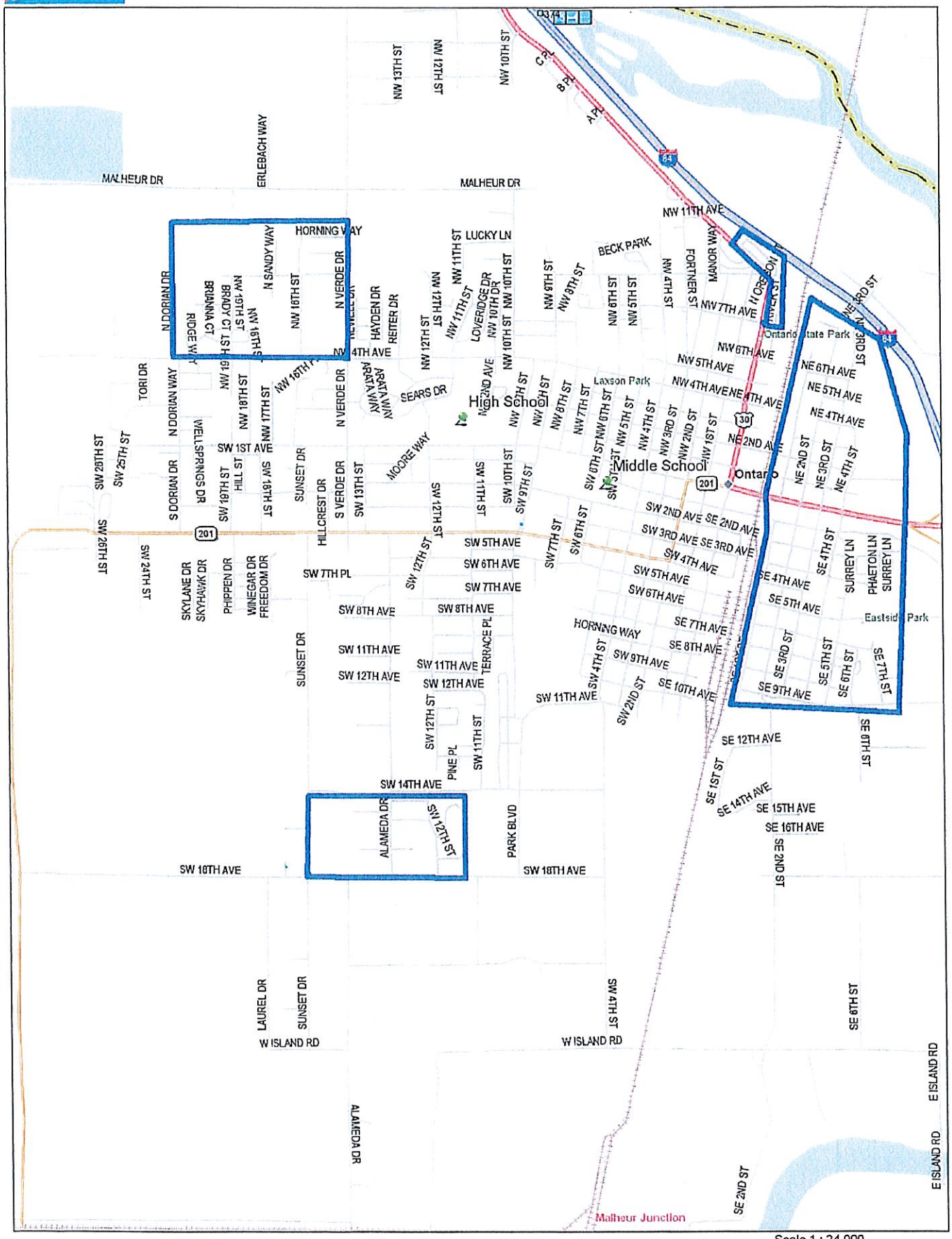
High traffic
High speed of trains on railroad tracks

General Area
North Oregon
NW 4th Ave.
NW 16th St.
SW 18th Ave.
Alameda Dr.

Unimproved connectors

General Area
SW 10th Ave. to 580 S Oregon St.

No lights and/or crosswalks



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TN
MN (15.7°E)

Scale 1 : 24,000

1" = 2,000.0 ft Data Zoom 13-1

Oregon State Board of Education
June 13, 2024
AGENDA ITEM: 4.N.

SUBJECT: State Board of Education Board Leadership **STAFF NAME & OFFICE**: Corey Rosenberg, SBE Administration Election of State Board of Education Chair, Vice Chair, & 2nd Vice Chair. to serve July 1, 2024 – June 30, 2025 ☐ New Rule ☐ Amend Existing Rule ☐ Repeal Rule	☐ **First Reading** ☐ **Presentation** ☐ **No Presentation** ☒ **Action** ☐ **Temp Rule** ☐ **Presentation** ☒ **No Presentation**

BACKGROUND

The State Board of Education Procedures & Policy Manual states in Policy Number 101 that each year, the board will elect their Chair, Vice Chair, 2nd Vice Chair. The Board is to create a committee of two to three Board members to nominate Board leadership. This year, Guadalupe Martinez Zapata and Bridgett Wheeler were the nominating committee. The nominatrions are as follows:

Chair: Jennifer Scurlock

Duties of the Chair:

- Sets agenda.
- Presides at meetings.
- Ensures fairness and impartiality.
- Enforces parliamentary procedure.
- Acts as the primary spokesperson to the press for the board.
- Performs other duties as may be required by law or action of the board.
- Names members for board subcommittees and liaisons, unless a majority of the board votes otherwise.
- Serves as an ex-officio member on board subcommittees.
- Calls special meetings not on board's adopted calendar.

Vice-Chair: Shimiko Montgomery

Duties of the Vice Chair:

- Presides at meetings in the event of an absence of the Chair.
- Performs other duties as directed by the Chair or the vote of the board.

2nd Vice-Chair: Cynthia Richardson

Duties of the Second Vice Chair:

- Presides at meetings in the event of an absence of the Chair and Vice Chair.
- Performs other duties as directed by the Chair or the vote of the board.

SUMMARY OF PREVIOUS BOARD ACTION

Oregon State Board of Education
June 13, 2024
AGENDA ITEM: 4.N.

Previously, Guadalupe Martinez-Zapata served as Chair, Jennifer Scurlock served as Vice-Chair, and Shimiko Montgomery served as 2nd Vice-Chair. According to the State Board Procedures and Policy Manual, an individual serving as Chair may do so for up to two consecutive years, pending renomination and board approval. There are no limits on the number of terms a member may serve in the Vice-Chair or 2nd Vice-Chair positions.

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:

During the first reading in May, the nominations did not include a nomination for the 2nd Vice-Chair position. With this June second reading/potential action, the nominations do include Cynthia Richardson as the nominee for 2nd Vice-Chair position. The nominations for the Chair and Vice-Chair positions remain unchanged.

POLICY ISSUE OR CONCERNS

The State Board of Education has clear guidelines to select their Board leadership. The Board administrator is asked to create a nominating committee comprised of two to three Board members. However, the Board administrator removes themselves from nominating committee discussions. Once the nominating committee discusses Board leadership, they alert the Board adminitrator of their nominations after they speak to the nominees. Board administrator then presents the nominations to the full Board as a first reading. The first reading alerts the public that the Board is considering these Board members for leadership positions and allows for public comments on these recommendations. The full Board will take action in June of 2024.

EQUITY IMPACT ANALYSIS

Since the Board's Policy & Procedures manual describes a process of nominating Board leadership, outside educational stakeholders, school districts, or advisory groups are not included in the nomination committee deliberations. The opportunity to provide feedback on Board leadership is open during the first reading in May and action in June.

The Board of Education is focused on equity, diversity, and inclusion. The nominating committee took into account not only professional experience but also background coupled with experience on the board.

FISCAL ANALYSIS

This will not have fiscal impact on the Board, the Department of Education or school districts.

EFFECT OF A "YES" OR "NO" VOTE

Oregon State Board of Education
June 13, 2024
AGENDA ITEM: 4.N.

A rejection of the nominating committee recommendations would trigger a Board conversation about who will be part of Board leadership. Accepting the recommendations of the nominating committee, would mean that the current nominees would serve as Chair, Vice-Chair and 2nd Vice-Chair for the State Board of Education for the period of July 1, 2024 to June 30, 2025.

STAFF RECOMMENDATION

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

ATTACHMENTS

None

2024/25 State Board of Education Calendar

August 2024						
Su	Mo	Tu	We	Th	Fr	**Sa**
				1	2	3
4	5	6	7	8	9	10
11	12	13	14	15	16	17
18	19*	20*	21*	22*	23*	24
25	26*	27*	28*	29*	30	31

September 2024						
Su	Mo	Tu	We	Th	Fr	**Sa**
1	2	3	4	5	6	7
8	9	10	11	12	13	14
15	16	17	18	19	20	21
22	23	24	25	26	27	28
29	30					

October 2024						
Su	Mo	Tu	We	Th	Fr	**Sa**
		1	2	3	4	5
6	7	8	9	10	11	12
13	14	15	16	17	18	19
20	21	22	23	24	25	26
27	28	28	30	31		

November 2024						
Su	Mo	Tu	We	Th	Fr	**Sa**
					1	2
3	4	5	6	7	8	9
10	11	12	13	14	15	16
17	18	19	20	21	22	23
24	25	26	27	28	29	30

December 2024						
Su	Mo	Tu	We	Th	Fr	**Sa**
1	2	3	4	5	6	7
8	9	10	11	12	13	14
15	16	17	18	19	20	21
22	23	24	25	26	27	28
29	30	31				

January 2025						
Su	Mo	Tu	We	Th	Fr	**Sa**
			1	2	3	4
5	6	7	8	9	10	11
12	13	14	15	16	17	18
19	20	21	22	23	24	25
26	27	28	29	30	21	

February 2025						
Su	Mo	Tu	We	Th	Fr	**Sa**
						1
2	3	4	5	6	7	8
9	10	11	12	13	14	15
16	17	18	19	20	21	22
23	24	25	26	27	28	

March 2025						
Su	Mo	Tu	We	Th	Fr	**Sa**
						1
2	3	4	5	6	7	8
9	10	11	12	13	14	15
16	17	18	19	20	21	22
23	24	25	26	27	28	29
30	31					

April 2025						
Su	Mo	Tu	We	Th	Fr	**Sa**
		1	2	3	4	5
6	7	8	9	10	11	12
13	14	15	16	17	18	19
20	21	22	23	24	25	26
27	28	29	30			

May 2025						
Su	Mo	Tu	We	Th	Fr	**Sa**
				1	2	3
4	5	6	7	8	9	10
11	12	13	14	15	16	17
18	19	20	21	22	23	24
25	26	27	28	29	30	31

June 2025						
Su	Mo	Tu	We	Th	Fr	**Sa**
1	2	3	4	5	6	7
8	9	10	11	12	13	14
15	16	17	18	19	20	21
22	23	24	25	26	27	28
29	30					

July 2025						
Su	Mo	Tu	We	Th	Fr	**Sa**
		1	2	3	4	5
6	7	8	9	10	11	12
13	14	15	16	17	18	19
20	21	22	23	24	25	26
27	28	29	30	31		

* Potential Board Retreat Date – **only <u>two</u> days** will ultimately be selected
Dates in **Blue** are prioritized in-person
Dates in **Red** are hybrid

2024 Charter School Waiver Request Form

Charter School Overview

Category	Your Response
Charter School Name	Helix Charter School
Address	106 Main Street, PO Box 398, Helix, OR 97835
Administrator Name	Brad Bixler
Contact Information	brad.bixler@helixsd.org / 541-457-2175
School District	Helix School District
Year School Opened	July 2023
Current Charter Contract Dates (Start and End Date)	July 14, 2023 - June 30, 2028
Brief description of your charter school's educational model (max 500 characters)	The mission of the Helix Charter School (HCS) is to encourage the success of all students by focusing on the student holistically. HCS's goals encompass the various aspects necessary to accomplish this, including critical thinking skills, arts education, and Science, Technology, Engineering and Math (STEAM) concepts. HCS believes that if a student is educated across these areas in addition to the core curriculum, they will be well rounded, life-long learners. In this endeavor HCS will seek to maintain the tradition of small class sizes and staff/student rapport that provides for an optimal educational experience. The staff, parents, community and various organizations will provide educational partnerships aiming toward student success. HCS will be guided by the Helix School District's Integrated Plan.

Waiver Request Summary

What statute would you like the State Board to waive?	338.125 (3)
Please summarize the waiver request (max 500 characters)	As a rural community, HCS has struggled to find qualified staff to fill vacant positions. The Helix Charter Council has proposed a revision to the enrollment process to increase the opportunity for staff children and kindergarten students to attend HCS. HCS would like to use a tiered system to select students through an equitable lottery process as described below: **Resident and HCS Staff Preference (Tier 1)**. Preference will be given to students who reside within the boundaries of the District and to any children of HCS staff. Students residing within the boundaries of the District and any children of HCS staff shall be admitted subject to applicable District policies. **Incoming Kindergartner and Sibling Preference (Tier 2).** If a student does not meet Tier 1 preference, the next tier of preference will be given to

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	incoming Kindergartners and siblings of currently enrolled students. Students entering Kindergarten for the next calendar school year and siblings of current HCS students shall be admitted subject to applicable District policies. **Non-resident Students (Tier 3).** If a student does not meet Tier 1 or Tier 2 preferences the next tier of preference, Tier 3, will be given to a non-resident student based on availability of open slots. Non-resident students shall be admitted subject to applicable district policies. **Lottery.** If applications for enrollment exceed the number of openings within a tier, HCS will conduct a lottery for that tier. **Equitable Principles.** The foregoing tiers shall be applied in each year of enrollment with students within each level being selected. This tiered process will provide stability in HCS enrollment and help attract and retain qualified staff.

Waiver Request Detail

1. Who are the racial/ethnic and underserved groups affected? What is the potential impact of the resource allocation and strategic investment to these groups?
HCS has no indication or data that supports that a racial/ethnic or underserved group will be affected.
2. Does the decision being made ignore or worsen existing disparities or produce other unintended consequences? What is the impact on eliminating the opportunity gap?
No. Students applying within each of the tiers is expected to be representative of the current diversity of HCS.
3. What are the barriers to more equitable outcomes? (E.g. mandated, political, emotional, financial, programmatic or managerial)
No barriers have been identified. HCS is currently completing its first year as a charter school. Enrollment data will be collected going forward which may indicate barriers to equitable outcomes. During this school year all students that wanted to attend HCS were admitted.
4. How have you intentionally involved stakeholders who are also members of the communities affected by the waiver request? How do present your information in questions (1), (2) and (3) to these stakeholders?
The Helix Charter Council, which represents in-district and out-of-district parents, students, and HCS staff discussed the enrollment process during open meetings and sought input from stakeholders before bringing an Enrollment MOU to the Helix School District Board of Directors. As a rural district, HCS and the Helix School District have struggled to attract and retain staff. Due to limited housing in Helix, many HCS staff live outside of the district and have to travel from surrounding communities to work in Helix. Allowing HCS to prioritize staff children in Tier 1 and kindergarten age students in Tier 2, will help attract and retain staff and support families from across our local communities that want to begin their child's formal public school education at HCS.

5. How will you modify or enhance your strategies to ensure each students' and communities' individual and cultural needs are met?

HCS will continue to seek input from stakeholders annually through surveys and in-person events to ensure cultural needs are met. We will continue to build partnerships with our local tribes through our educational, health, and professional contacts with the Confederated Tribes of the Umatilla Indian Reservation (CTUIR). Currently, CTUIR provides mental health support and a special education liaison for our Native students that attend HCS.

6. How are you collecting data on race, ethnicity, and native language?

HCS collects data through enrollment forms that are collected at the beginning of the year.

7. What is your commitment to P-20 professional learning for equity? What resources are you allocating for training in culturally responsive instruction?

HCS maintains a focus on our local community, people, and resources available to our community. We focus on social emotional learning daily and provide a licensed school social worker full time to support our students and staff. The HCS staff have been trained in Character Strong, a research-backed curricula and training that increases belonging, well-being, and engagement for HCS students and staff. Our daily schedule is built to support social emotional times for all students and our teams use an equity lens developed in partnership with InterMountain Education Service District (IMESD), in our decision making processes. HCS staff strive to understand the different learning styles of our K-12 students and we accommodate those differences with modifications in the classroom and differentiate our curriculum to meet our students' needs.

Data Collection

All charter schools with approved waivers will be required to report the impact of the wavier annually to the State Board. What is the charter school's plan for collecting data on how the proposed waiver will impact students and the quality of education? The plan must minimally include disaggregated data by student demographics and stakeholder engagement.

Helix Charter School – Student Demographics

	Hispanic	Two or More	American Indian/ Alaskan Native	Asian	Black/ African American	Native Hawaiian/ Other Pacific	White	Other	Total
Female	5	11	4	0	0	0	71	0	91
Male	7	6	1	0	0	1	76	0	91
Non-Binary	0	0	0	0	0	0	0	0	0
Total	12	17	5	0	0	1	147	0	182

Currently the only home language spoken by HCS students is English. HCS will continue to collect student demographic data annually, as well as attendance, behavior data, and academic performance data throughout the year. HCS has no indication or data that supports that a racial/ethnic or underserved group will be affected by this waiver.

Sponsor Acknowledgment

The State Board is interested to understand the charter school sponsor's position on the waiver request. Please include evidence that the sponsor acknowledges being notified of the waiver request and whether or not the sponsor is in favor of the request.

The Helix Charter Council proposed a change in the enrollment process to the Helix School District Board of Directors during their regular board meeting on March 13, 2024. The Helix School District Board reviewed the proposal, sought public input, and approved the attached MOU on April 10, 2024.

https://5il.co/2ie4m

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https://5il.co/2ie4m

Oregon State Board of Education
June 13, 2024
AGENDA ITEM: 5.A

SUBJECT: Helix Charter School Waiver Request **STAFF NAME & OFFICE**: Kate Pattison, Director of School Choice, Options, and Recovery Education; Director's Office Helix Charter School is requesting a waiver of enrollment requirements in ORS 338.125(3) to implement a lottery process that provides preference to students who are children of Helix Charter School staff.	☐ **First Reading** ☐ **Presentation** ☐ **No Presentation** ☒ **Action** ☐ **Temp Rule** ☒ **Presentation** ☐ **No Presentation**

BACKGROUND

Public Charter School Waivers

The State Board of Education has been granted the authority to waiver certain provisions of the Public Charter School Statutes in ORS Chapter 338. The standards and process for requesting a waiver of ORS 338 have been set forth in OAR 581-026-0130 and the 2020 Process to Request a Charter School Waiver.

ORS 338.025 Rules; waiver of provisions of chapter; exceptions.

(1) The State Board of Education may adopt any rules necessary for the implementation of this chapter. The rules shall follow the intent of this chapter.

(2) Upon application by a public charter school, the State Board of Education may grant a waiver of any provision of this chapter if the waiver promotes the development of programs by providers, enhances the equitable access by underserved families to the public education of their choice, extends the equitable access to public support by all students or permits high quality programs of unusual cost. The State Board of Education may not waive any appeal provision in this chapter or any provision under ORS 338.115 (1)(a) to (aa), 338.120, 338.125 (4), 338.135 (2)(b) or 339.122.

OAR 581-026-0130: Procedure to Waive Certain Provisions of the Charter School Law

(1) A public charter school may petition the State Board of Education for a waiver of any provision of ORS 388. The written petition must specify the reason(s) the charter school is seeking the waiver and any other relevant information.

(2) The public charter school must notify the sponsor if a waiver under this section is being considered. Waivers granted by the State Board to a charter school may require amending the charter under the provisions of OAR 581-026-0100 (7).

(3) The State Board of Education, upon receipt of a waiver petition, will review the petition and may grant the waiver upon a showing that approving the waiver would:

(a) Promote the development of programs by providers;

(b) Enhance the equitable access by underserved families to the public education of their choice;

(c) Extend the equitable access to public support by all students; or

(d) Permit the development of high quality programs of unusual cost.

(4) The State Board of Education may not waive any review provision under the Act or any provision under ORS 338.115(1).

Helix Charter School

Helix Charter School began operating in the fall of 2023 after the district's only school was converted to a public charter school. Oregon law allows school districts with one school to convert to a public charter school and allows the district school board to serve as the charter school board. There are currently 25 single-school district charter schools operating in Oregon.

The school is located in Helix, a small rural town in Umatilla County with a population of about 200. The district serves students who live across 220+ square miles north of Pendleton. The school is about 18 miles from Pendleton, 37 miles from Umatilla, and 62 miles from La Grande.

In the 2022-23 school year, Helix School District served 147 students and employed 17 teachers, three educational assistants, and one administrator (2022-23 At-A-Glance Profile). The school district decided to convert the school to a charter school to leverage some of the charter school flexibilities such as educator qualifications and open enrollment boundaries.

The charter school has struggled to recruit qualified staff to fill vacant positions and seeks this waiver in hopes that the tiered enrollment process will increase successful recruitment.

ODE Staff Analysis of Waiver Request

The charter school is requesting to waive ORS 338.125(3), which includes the requirement that students who apply to the charter school must be selected through a lottery if the number of applicants exceed the charter school's capacity. This statute allows a public charter school to give priority enrollment to students who reside in the attendance boundary of a converted school public school, students who were enrolled in the prior year, students who were enrolled in a public preschool operated by the charter school, siblings of current students, and students who are at risk because of an economic or academic disadvantage.

Helix is proposing an enrollment process with three tiers of preference being applied to student enrollment. This will be included with the lottery when applications exceed the space available.

Tier 1 - Resident and HCS Staff Preference: Preference will be given to students who reside within the boundaries of the District and to any children of HCS staff. Students residing within the boundaries of the District and any children of HCS staff shall be admitted subject to applicable District policies.

Tier 2 - Incoming Kindergartner and Sibling Preference: If a student does not meet Tier 1 preference, the next tier of preference will be given to incoming Kindergartners and siblings of currently enrolled students. Students entering Kindergarten for the next calendar school year and siblings of current HCS students shall be admitted subject to applicable District policies.

Tier 3 - Non-resident Students: If a student does not meet Tier 1 or Tier 2 preferences the next tier of preference, Tier 3, will be given to a non-resident student based on availability of open slots. Non-resident students shall be admitted subject to applicable district policies.

As a single-school district with a public charter school, the district is still required to provide access to the charter school for residents of the Helix School District. Therefore, any student who moves into the

attendance boundary is guaranteed enrollment at the charter school or an alternate option if they choose not to enroll at the charter school. This tiered approach to enrollment preference and lottery will apply to students who reside outside of the attendance boundary.

The school will still be required to comply with all other subsections of ORS 338.125.

ORS 338.025 requires the State Board to evaluate the waiver request based on the following criteria:

1. Does the wavier promote the development of programs by the district?
2. Does the waiver enhance the equitable access by underserved families to the public education of their choice?
3. Does the wavier extend the equitable access to public support by all students?
4. Does the wavier permit the development of high quality programs of unusual cost?

SUMMARY OF PREVIOUS BOARD ACTION

This item was presented to the Board at the May meeting as a written only first read. The State Board has not previously acted on items related to Helix Charter School.

Since 2014, the Board has approved 14 out of 20 waiver requests to allow children of staff to have priority admission or preference in the lottery. (See State Board Waivers List attached)

POLICY ISSUE OR CONCERNS

The State Board typically grants waivers for the duration of the charter school contract. Helix Charter School's current contract goes through June 30, 2028.

EQUITY IMPACT ANALYSIS

See application narrative provided by the requestor.

FISCAL ANALYSIS

There is no fiscal impact on the Department or the State Board of Education.

EFFECT OF A "YES" OR "NO" VOTE

Yes = If the Board grants the waiver, Helix Charter School will be able to utilize the tiered approach for enrollment process that allows children of staff to have tier 1 preference. The school will need to track data on the impact this waiver makes to their school and present the data annually to the department.

No = Helix Charter School will not be allowed to give preference to students beyond what is allowed in ORS 338.125.

ATTACHMENTS

Attachment 1: 2024 Helix Charter School Waiver Request
Attachment 2: 2022-23 Helix School District At-A-Glance School Profile

Oregon State Board of Education
June 13, 2024
AGENDA ITEM: 5.A

Attachment 3: State Board Waivers List

Oregon State Board - Public Charter School Waiver Requests

#	Charter School	District	Request Date	Request Type	Action Type	Action Date	Waiver Term
1	Willamette Valley Community School	Corvallis		Selection of students (students attending Alt. Ed. grandfathered in)	Approved		
2	Lourdes School	Scio	9-24-99	Waived from operational timeline	Approved	10-20-99	
3	Molalla Options	Molalla River	9-24-99	Waived from operational timeline	Approved	10-20-99	
4	Armadillo Technical Institute	Phoenix-Talent	7-9-01	20% out-of-district cap	Approved		
5	McCoy Academy	Portland	1-18-02	Waive PERS requirement (not joint with district)	Denied	2-2002	
6	Pioneer Youth Corps Academy (PYCO)	Eugene	1-18-02	Waive PERS requirement (not joint with district)	Denied	2-2002	
7	Lighthouse School	North Bend	3-25-02	Waive the 80% ADMw payment (ORS 338.155) in exchange for a 19 % ADMw funding and 19% in-kind services	Approved	4-18-02	
8	Lighthouse School	North Bend	3-27-02	Admission preference for children of charter school developers	Approved	4-18-02	
9	Howard Street Charter School	Salem-Keizer	3-28-02	• Enroll siblings of 9th graders • Grandfather in current 6th and 7th graders	Approved	4-18-02	403
10	Sand Ridge Charter School	Lebanon Community	4-23-02	Request for waiver from 20% out-of-district cap (joint with the district)	Approved	6-18-02	
11	Lourdes School	Scio	4-29-02	Request for waiver from 20% out-of-district cap (joint with the district)	Approved	5-16-02	
12	Center for Advanced Learning	Gresham-Barlow	11-21-02	1. Permission to have multiple districts as sponsors 2. Permission to waive having a comprehensive educational program 3. Permission to waive the percent of support accompanying each student from 95% to no more than 50%	# 1 – Approved	2-20-03	
13	Armadillo Technical Institute	Phoenix-Talent	2-5-03	Waive PERS requirement, alternate retirement plan (not joint with district)	Denied		
14	Willamette Leadership Academy	Fern Ridge	9-9-03	Request for waiver from 20% out-of-district cap (joint with the district)	Approved		

#	Charter School	District	Request Date	Request Type	Action Type	Action Date	Waiver Term
15	Jane Goodall Environmental Middle School	Salem-Keizer	6-21-04	Request from 338.125-allows current 6th and 7th grade students priority enrollment. Lottery will be held for 6th grade. Only for 2004-05 school year. (joint with the district)	Approved	9-16-04	
16	Phoenix School of Roseburg	Douglas County 4	7-20-04	• Request from 338.125(2)-to allow an in-district student enrollment "cap" of 140 students of the 195 student capacity. Remaining student population will be out-of-district students. • Request from 338.125-to establish concurrence by enrolling student, parents and staff that attendance at Phoenix is the best decision for the student. • Request from 338.135-to allow 40% of teaching/administrative staff to teach with a restricted, transitional license. Said teachers will enter a TSPC-approved MAT program and make adequate annual progress toward licensure. Initial licensure will be achieved within three years.	1st bullet granted, other two denied.	9-16-04	404
17	Network Charter School	Eugene	9-1-04	Request from 338.135-to allow teaching/administrative staff to teach with a regular, transitional license and be considered licensed staff	Approved	9-16-04	
18	Oregon Coast Technology Charter School	North Bend	3-8-06	Allow for successful continuation of the current technology program			
19	Springwater Environmental Sciences School	Oregon City	4-20-06	• Request to admit siblings if a sibling is drawn in the lottery • Founders children given priority in the lottery, will be admitted • Employee children given priority in the lottery to be admitted	Approved		

Oregon State Board - Public Charter School Waiver Requests

#	Charter School	District	Request Date	Request Type	Action Type	Action Date	Waiver Term
20	Lighthouse School	North Bend	4-20-06	• Request from 338.135-to allow teaching/administrative staff to teach with a regular, transitional license and be considered licensed staff for the 06-07 school year	Approved	4-20-06	
21	Cascade Academy (Cascade Heights Charter School)	North Clackamas	5-25-06	Admission preference for children of charter school developers	Approved		
22	Sweet Home Charter School	Sweet Home	7-17-06	• No preference district students, resident/non-resident the same • Preference to current students and siblings			
23	Kings Valley Charter School	Philomath	2-15-07	• Establish geographic boundary for kindergarten enrollment priority	Denied	3-07	
24	Oregon Connections Academy	Scio	2-15-07	• Waiver from ORS 338.165 (SSF/Special Ed distribution formula)			
25	Madrone Trail School	Medford	2-15-07	• Preference for founding members and employees • Preference for siblings, if one is selected first • CS located in district that is not the sponsor	Approved Approved Denied		405
26	Sage Community Charter School	Klamath County	5-18-07	Admission preference for children of charter school developers	Approved for 2007-08 school year		
27	Forest Grove Community Charter School	Forest Grove	5-18-07	Admission preference for children of charter school developers, board members and staff	Approved for 2007-08 school year		
28	Insight School of Oregon	Lincoln County	9-7-07	Request waiver from OAR 338.125, 50% of students must be in-district.			
29	West Lane Technical Learning Center	Fern Ridge	11-15-07	Request waiver from OAR 338.125, 50% of students must be in-district.	March 2008		
30	Oregon Connections Academy	Scio	11-27-07	• waiver from ORS 338.165 (SSF/Special Ed distribution formula)			

Oregon State Board - Public Charter School Waiver Requests

#	Charter School	District	Request Date	Request Type	Action Type	Action Date	Waiver Term
31	Alliance Charter Academy	Oregon City	Dec 2. 2007	Admission preference for children of charter school staff for Spring 2008 lottery and no more than 5%	First read 1.17.2008 Bring back for consent agenda in Feb.	Feb. 2008	
32	Oregon Virtual Academy Charter School	North Bend	1-17-08	Request waiver from OAR 338.125, 50% of students must be in-district.	Information only		
33	Sisters Web Academy	Sisters	3.25.2008	50% waiver request	Denied 5/15/2008		
34	Marcola Web Academy	Marcola	3.25.2008	50% waiver request	Denied 5/15/2008		
35	Oregon Virtual Academy Charter School	North Bend	06/19/08	50%	Approved	06/19/08	
36	Sisters/Marcola Web Academy	Sisters/ Marcola	06/19/08	50%	Approved with conditions	6/19 Withdrawn July 2008	406
37	Sisters Academy Fine Arts	Sisters	06/19/08	Active Enrollment – 25	Approved	06/19/08	
38	Four Rivers	Ontario	06/19/08	Lottery	Approved	06/19/08	
39	ORCA	Scio	12/12/08	50%	Approved	02/19/09	
40	Community Roots	Silver Falls	02/19/09	Lottery	Approved	02/19/09	
41	Muddy Creek	Corvallis	02/19/09	Lottery	Approved	02/19/09	
42	Opal	Portland	04/16/09	Lottery	Approved	04/16/09	
43	ORCA	Scio	04/16/09	50%	Approved	06/19/09	
44	West Lane Technology	Fern Ridge	06/19/09	50%	Approved	06/20/09	
45	Three Rivers	West Linn-Wilsonville	08/28/09	Lottery	Approved	08/28/09	

Oregon State Board - Public Charter School Waiver Requests

#	Charter School	District	Request Date	Request Type	Action Type	Action Date	Waiver Term
46	Prospect	Prospect	10/23/09	Enrollment Priority	Approved	10/23/09	
47	Sisters Academy Fine Arts	Sisters	12/04/09	Active Enrollment – 25	Approved	12/04/09	
48	Village School	Eugene	01/29/10	Enrollment Priority	Approved	01/29/10	
49	Portland Village	Portland	03/11/10	Enrollment Priority	Approved	03/11/10	
50	Portland Village CS	Portland	8/6/10	Enrollment Priority	Approved	10/29/10	
51	ACE	Reynolds	9/28/10	Enrollment Priority – All 4 SDs	Approved	12/9/2010	
52	Four Rivers	Ontario/SBE	10/26/10	Enrollment Priority – Employees/Siblings	Approved	12/9/2010	
53	CAL	Gresham-Barlow	9/23/10	Enrollment Priority – All 3 SDs	Approved	1/21/2011	
54	Oregon Connections Academy	Scio	2/11/11	50%			407
55	Oregon Virtual Academy	North Bend	2/14/11	50%			
56	Ivy School	Portland	1/8/11	Enrollment Priority	Approved		
57	Coburg Charter School	Coburg	3/30/11	Enrollment Priority	Approved	4/14/11	
58	Alliance Charter Academy	Oregon City	31/11	Enrollment Priority	Approved	4/14/11	
59	Trillium Charter School	Portland	2/21/11	Enrollment Priority	Approved	4/14/11	
60	Madrone Trail Charter School	Medford	3/1/11	Enrollment Priority	Approved	4/14/11	
61	Oregon Virtual Academy	North Bend		50%			
62	Oregon Connections Academy	Scio		50%			

Oregon State Board - Public Charter School Waiver Requests

#	Charter School	District	Request Date	Request Type	Action Type	Action Date	Waiver Term
63	Alliance Charter Academy	Oregon City	4/21/11	50%	N/A		
64	North Powder Charter School	North Powder	4/11/11	Enrollment Priority	Approved	5/19/11	
65	Alliance Charter Academy	Oregon City	4/21/11	50%	Approved	6/24/11	
66	Four Rivers Community School	Ontario/SBE	4/25/11	Enrollment Priority	Approved	6/24/11	
67	MITCH	Tigard-Tualatin	6/1/11	Enrollment Priority	Approved	6/24/11	
68	West Lane Tech Learning Center	Fern Ridge	5/31/11	50%			
69	Coburg Community Charter School	Eugene		Enrollment Priority – attendance boundary	Approved	3/2012	408
70	Sauvie Island Charter School	Scappoose		Enrollment Priority – geographical boundary & Children of staff	Approved	3/2012	
71	LeMonde Charter School	Portland		Enrollment Priority	Approved	3/2012	
72	JGEMS	Salem-Keizer		Enrollment Priority	Approved	3/2012	
73	Four Rivers Community School	ODE		Enrollment Priority	Approved	4/2012	
74	Hope Chinese Charter School	Portland		Enrollment Priority	Approved	4/2012	
75	Portland Village School	Portland		Enrollment Priority	Approved	4/2012	
76	Willamette Leadership Academy	Springfield		Enrollment Priority – former district	Approved	4/2012	

Oregon State Board - Public Charter School Waiver Requests

#	Charter School	District	Request Date	Request Type	Action Type	Action Date	Waiver Term
77	Paisley Charter School	Paisley		Registered/Licensed Teachers	Approved	6/2012	
78	Gresham-Barlow Web Academy	Gresham-Barlow		Term of Renewal Contract	Approved	6/2012	
79	REALMS	Bend-La Pine		Enrollment Priority	Approved	1/2013	
80	ORVED East	Sherman Co		Enrollment Priority – Geographical Boundary	Denied	3/2013	
81	ORVED West	Gaston		Enrollment Priority – Geographical Boundary	Denied	3/2013	
82	Sherwood Charter School	Sherwood		Enrollment Priority	Approved	3/2013	
83	Ridgeline Montessori Charter School	Eugene		Enrollment Priority	Approved	4/2013	409
84	Arco Iris Charter School	Beaverton		Enrollment Priority	Approved	5/2013	
85	Opal Charter School	Portland		Enrollment Priority	Approved	9/2013	
86	Eola Hills Charter School	Amnity		Physical location outside sponsoring district	Approved	10/2013	
87	Madrone Trail Charter School	Medford		Enrollment Priority – Prior Waldorf Experience	Denied	10/2014	
88	Lewis and Clark Montessori Charter School	Gresham-Barlow		Enrollment Priority	Approved	10/2014	1 year
89	Kairos PDX	Portland		Enrollment Priority	Approved	10/2014	1 year
90	Bend International School	Bend La Pine	3/24/2015	Enrollment Priority/Weighted Lottery	Approved	3/5/2014	1 year
91	LEP High School	PPS	4/30/2015	Closure notice timeline	Approved	5/21/2015	NA

Oregon State Board - Public Charter School Waiver Requests

#	Charter School	District	Request Date	Request Type	Action Type	Action Date	Waiver Term
92	Imbler Charter School	Imbler	November 2015	Enrollment Priority (Staff)	Approved	1/21/2016	Charter Term
93	Arco Iris Charter School	Beaverton	March 2016	Enrollment Priority (Staff and Middle School Students from Other Public Spanish Language Immersion Programs)	Approved	5/19/2017	Charter Term
94	Lighthouse Charter School	Coos Bay	February 2016	Enrollment Priority (Students Previously Enrolled)	Approved	5/19/2017	1 Year
95	Paisley Charter School	Paisley	January 2017	Enrollment Priority (Staff)	Approved	2/23/2017	Charter Term
96	Four Rivers Community School	Ontario	January 2017	Enrollment Priority (Staff)	Approved	2/23/2017	Charter Term
97	Sauvie Island Charter	Scappoose	January 2017	Enrollment Priority (On-Island & Staff)	Approved	3/23/2017	Charter Term
98	Desert Sky Charter School	Bend LaPine	January 2017	Enrollment Priority (Staff and Founders)	Approved	3/23/2017	Charter Term
99	Molalla River Academy	Molalla River	December 2017	Enrollment Priority (Staff)	Approved	6/21/2018	Charter Term
100	Wahtonka Charter School	North Wasco County	March 2018	Enrollment Priority (Students Previously Enrolled)	Approved	6/21/2018	Charter Term
101	The Cottonwood School	PPS/ODE	April 2018	Enrollment Priority (Staff)	*Approved*	*6/21/2018*	*Charter Term*
102	Alliance Charter Academy	Oregon City	April 2019	Enrollment Priority (Staff)	*Denied*	*6/20/19*	
103	Dallas Community School	Dallas SD	April 2019	Enrollment Priority (Staff)	*Denied*	*6/20/19*	
104	Hope Chinese Charter School	Beaverton SD	April 2019	Enrollment Priority (Staff)	*Denied*	*6/20/19*	

#	Charter School	District	Request Date	Request Type	Action Type	Action Date	Waiver Term
105	Lewis and Clark Montessori Charter School	Gresham-Barlow SD	April 2019	Enrollment Priority (Staff)	*Denied*	*6/20/19*	
106	Mountain View Academy	Lowell SD	April 2019	Enrollment Priority (Staff Children and Grandchildren)	*Denied*	*6/20/19*	
107	Woodland Charter School	Three Rivers SD	April 2019	Enrollment Priority (Staff)	*Denied*	*6/20/19*	
108	Emerson Charter School	PPS	Feb 2020	Weighted Lottery	*Approved*	*6/18/2020*	*Charter Term*
109	The Village School	PPS	Feb 2020	Weighted Lottery	*Approved*	*6/18/2020*	*Charter Term*
110	KairosPDX	PPS	Feb 2020	Weighted Lottery and Enrollment Priority (Staff)	*Approved*	*6/18/2020*	*Charter Term*
111	The Ivy School	PPS/ODE	Feb 2020	Weighted Lottery and Enrollment Priority (Staff)	*Approved*	*6/18/2020*	*Charter Term*
112	Le Monde French Immersion School	PPS	Mar 2021	Registered/Licensed Teacher (up to 100% registered)	*Denied*	*5/20/2021*	
113	Four Rivers Community School	PPS/Ontario	Mar 2021	Weighted Lottery	*Approved*	*5/20/2021*	*Charter Term*
114	The Lighthouse School	Coos Bay	Mar 2022	Enrollment Priority (35% nonresident)	*Denied*	*3/17/2022*	
115	Sauvie Island School	Scappoose	January 2023	Enrollment Priority (Children of Staff)	*Approved*	*5/18/2023*	*Charter Term*
116	Kalmiopsis Charter School	Three Rivers	January 2023	Teacher Licensure FTE %	*Approved*	*5/18/2023*	*8/1/23-6/30/26*

SECTION V – Board Relationships

- Policy #500 - Collaboration and Engagement
- Policy #501 - Oregon Department of Education
    - 501.1 - Board Request of Agency Staff
    - 501P.1 - Board Requests of Agency Staff Process
- Policy #502 - Superintendent of Public Instruction (Governor)
    - 502.1 - Appointment of Deputy Superintendent of Public Instruction
    - 502.2 - Removal of Deputy Superintendent of Public Instruction
    - 502.3 - Board Oversight and Collaboration
- Policy #503 - Board Administrator and Support Staff
- Policy #504 - Department of Justice
- Policy #505 - Tribal Consultation and Collaboration

Policy #500 - Collaboration and Engagement

The State Board of Education works cooperatively with others engaged in improving education for Oregon's PK-20 educational system, to advance common interests. These partnerships include, but are not limited to the following:

- The Governor;
- The Legislature;
- The federal government, particularly the US Department of Education;
- The Higher Education Coordinating Commission;
- The Early Learning Council;
- The Governor's Education Policy Advisor;
- The Teacher Standards & Practices Commission;
- The Quality Education Commission;
- Local school districts;
- Education Service Districts;
- Educator Advancement Council;
- Youth Development Council;
- Student Success Plan Advisories
- Racial Justice Council and subcommittees
- Non-governmental education agencies
- Private schools; and,
- Business, industry, and labor.

The Board should regularly communicate with the above partners through formally established channels and be available to them for consideration of educational matters. Similarly, the Board encourages its partners to communicate their concerns and needs to the Board.

The Board will communicate with the members of the Legislative Assembly through formally established channels and be available to them for consultation of educational matters.

The Deputy Superintendent will regularly communicate with the Governor and Legislature regarding the needs of public education.

Policy #501 - Oregon Department of Education

The Department of Education is created and shall function under the direction and control of the State Board of Education with the Superintendent of Public Instruction serving as an administrative officer for public school matters.

The Department of Education shall consist of agencies and officers that are added by law to the Department of Education and administrative organizations and staff required for the performance of the department's functions.

All administrative functions of the State Board of Education shall be exercised through the Department of Education, and the department shall exercise all administrative functions of the state relating to supervision, management and control of schools not conferred by law on some other agency (ORS 326.111).

501.1 - Board Requests of Agency Staff

Individual Board members, ex-officio members or their designees, or Board advisors do not have authority to direct ODE, district, or school level staff.

501P.1 - Board Requests of Agency Staff Process

Any Board member, ex-officio member or their designee, or Board advisor who desires a written report or survey prepared by agency staff will make such a request to the Board Chair and Board Administrator, who will send the request to the Deputy Superintendent. The Deputy Superintendent will notify or share the request with the full Board, consider the request, including its value to the Board and the workload of agency staff, and share a decision with the requesting member.

In addition, the Chair may request, through the Deputy Superintendent, that agency staff prepare materials for presentation to the full Board. The Chair may do this in anticipation of, or in response to, questions Board members may have about a specific issue[1]. The Deputy Superintendent will consider the request, including its value to the Board and the workload of agency staff, and share a decision with the Chair.

The full Board may make formal requests of the agency via a majority vote at a formal meeting. Requests of staff by the full Board shall be evaluated in terms of resources and impact on the agency by the Deputy Superintendent, who shall report on that impact and their decision at the next regular meeting.

Policy #502 - The Superintendent of Public Instruction

The Governor is the Superintendent of Public Instruction (ORS 326.300). The Superintendent of Public Instruction shall exercise, under the direction of the State Board of Education, a general superintendence of school officers and the public schools. The Superintendent's educational duties are listed in ORS 326.310**, and include**:

- Acting as administrative officer of the State Board of Education.
- Acting as executive head of the Department of Education.
- Assisting district and education service district boards in answering questions concerning the proper administration of the school laws, the rules of the State Board of Education and the ministerial duties of school officers and teachers. .
- Obtaining and compiling any statistical information relative to the condition and operation of the public schools necessary for the advancement of education and for the information of the state board and the public).
- Appointing such personnel as may be necessary for the performance of the duties of the office of the superintendent (ORS 326. 310).

502.1 - Deputy Superintendent of Public Instruction

The Governor shall appoint a Deputy Superintendent of Public Instruction. The appointment of the Deputy Superintendent shall be subject to confirmation by the Senate (ORS 326.300; ORS 171.562; ORS 171.565).

The Deputy Superintendent shall perform any act or duty of the office of Superintendent of Public Instruction that is designated by the Governor (ORS 326.300).

502.2 - Removal of Deputy Superintendent of Public Instruction

The Deputy Superintendent may be removed from office by the Governor following consultation with the State Board of Education (ORS 326.300).

502.3 - Board Oversight and Collaboration

As the oversight body to the Superintendent of Public Instruction and their appointed Deputy Superintendent, the State Board of Education collaborates and has discretion to advise the Deputy Superintendent on public instruction responsibilities.

Policy #503 - Board Administrator & Support Staff

The Board Administrator will work closely with the ODE Director and Board Chair to help manage the day-to-day operation of the Board, including:

- Coordinating the preparation of Board agendas, docket items, and minutes in keeping with the Public Records Law;

- Facilitating communication between the Board and others, including the Governor, Legislature, Deputy Superintendent, state and federal agencies, and state, local, and national organizations;
- Coordinating travel and expense reimbursement to meetings;
- Coordinating meeting logistics of standing and special committees of the Board; and,
- Orienting new members and advisors to board processes and agency function

All issues that are brought forth by agency staff to the Board Administrator will be conveyed to the Board Chair and Deputy Superintendent for consideration.

Policy #504 - Department of Justice

The State Attorney General's office is the authorized legal counsel for the State Board of Education, the Deputy Superintendent of Public Instruction, and the Department of Education (ORS 180.060; 180.220). No state officer, board, commission, or the head of a department or institution of the state shall employ or be represented by any other counsel or attorney at law (ORS 180.220). Individual Board members, either governor-appointed, ex-officio, or the designees of ex-officios, do not have access to the Department of Justice as individuals. The Board would need a motion to ask for advice, and a majority of the Board would need to vote to get the advice. There are very specific criteria that the Board needs to meet in order to enter into executive session under ORS 192.660, which must be identified on the agenda.

Policy #505 - Tribal Consultation, Communication, and Collaboration

The State Board of Education honors and respects tribal sovereignty, self-determination, and the perspectives of Oregon's First Nations. Through the Department of Education, the Board commits to engaging tribal officials and tribal representatives in regular and meaningful consultation, collaboration, and communication on any Board actions which may have tribal implications.

The Board recognizes that a responsible and generative approach consists of early and ongoing involvement and sustained partnership with Tribal collaborators, and will request that the Deputy Superintendent engage in formal consultation when issues of self-determination are involved. The Board will participate in formal consultations as appropriate.

Furthermore, the Board commits to participating in regular training opportunities regarding the history and experiences of Oregon's First Nations to ensure that Board members are sufficiently knowledgeable of the legal status of tribes, the legal rights of members of tribes and issues of concern to tribes.

The emphasis that this policy underscores is intended to support formal channels and procedures, not supplant them.

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

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;

(4d) 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:

(Aa) 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;

(Bb) 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;

(Cc) 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;

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

(eE) 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

(fF) 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.

(6f) 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

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 **STAFF NAME & OFFICE**: Aujalee Moore, Beth Wigham, Alexa Pearson - Office of Teaching, Learning, and Assessment. 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. **X** New Rule **X** Amend Existing Rule ☐Repeal Rule	☐ **First Reading** ☐ **Presentation** ☐**No Presentation** **X Action** ☐**Temp Rule** **XPresentation** ☐**No Presentation**

BACKGROUND

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 the 2023 legislative session. 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

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

- 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, how credits are awarded, and 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, Option A creates the same requirements for both content areas which will reduce confusion and mitigate the risk of inequitable outcomes.

In response to feedback received prior to the first-read, ODE brought forth two versions of the proposed new OAR to the State Board of Education in April 2024. The versions are summarized as follows:

- 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.
- Option B: 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.

At the April meeting, ODE recommended 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.

Following the April first-read, ODE and the State Board of Education continued to receive public feedback regarding Section 2 of the new rule language, which outlines how credits are awarded for the two new required content areas. Feedback was also provided on Section 1 with a recommendation to remove school counselors from the list of educators who could potentially teach the courses.

On May 21st, ODE attended an OAR Hearing with representatives from the Coalition of Oregon School Administrators, Oregon Education Association, and Multnomah ESD, who emphasized the need to provide districts with the most flexible option to choose a standalone course or two-way integration; this reflects what is currently in place for all other content standards.

On May 30th, ODE provided testimony to the Senate Education Committee on ODE's rulemaking process, and specifically described the process related to Senate Bill 3 rules. The presentation began with Legislative Counsel providing legislative opinion on behalf of Senator Dembrow. The legislative counsel

opinion stated that the intent of the legislation was for the courses to both be stand alone courses, and that other content area standards could be integrated into a Higher Education and Career Path Skills course or Personal Financial Education to receive credit in more than one content area, rather than two-way integration..

On June 3, Oregon Kitchen Table (OKT) produced a final summary report on their findings from community engagement for the new diploma requirements which elevated themes, quotes, suggested edits and implementation needs and concerns. The feedback collected was related to the standards for each content area, as well as general implementation feedback. Those who contributed feedback included the following:

- LGBTQSIA2+ youth
- Immigrant and refugee communities
- Youth whose parents are or were incarcerated
- Youth who are involved in systems (residential treatment, juvenile justice, long term care)
- English learners
- Staff and students age 12-25 who access drop-in centers
- Black, Latinx, and Filipino identifying youth and adults
- Students who experience disabilities
- Students experiencing houselessness

The report highlighted the following general feedback:

- There is broad agreement that Oregon students need more preparation to navigate a world full of large, often-intimidating systems and complex decision-making.
- Schools can provide information that families might not otherwise teach at home.
- It is important for teachers to understand how people from a wide variety of cultures relate to financial decision-making and future planning.
- Including more perspectives and people in this class, opposed to just a single teacher, would support student learning.

In response to the feedback received, ODE has provided the Board with three options for the new administrative rule. The versions are summarized as follows:

- Option 1: Allows Higher Education & Career Path Skills and Personal Financial Education standards to be integrated into other content area courses and vice versa.
- Option 2: 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 may not be integrated into a different content area course.
- Option 3: Requires standalone courses for both Higher Education & Career Path Skills and Personal Financial Education. Other content area standards may be integrated into Higher Education & Career Path Skills and Personal Financial Education courses to receive credit in more than one content area.

The third option has been added to the second reading of the rules based on additional engagement and the legislative opinion provided by the legislative council. ODE will defer to the Board's authority to determine the final rule language.

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

SUMMARY OF PREVIOUS BOARD ACTION

This item was brought before the Board for a first-read at the April 2024 meeting.

HAS THE RULE CHANGED SINCE LAST BOARD MEETING?

☐ N/A; first read—hasn't been before board
☐ No; same as last month
X Yes – As follows: In response to feedback from the public and the Senate Education Committee, ODE will present three options for the new rule language, which includes a new option where both content areas require a standalone course.

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 if option 2 or 3

were adopted by the Board . However, there is much all districts can learn from those with a longer history of teaching the PFE 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 will supporting the implementation of these new requirements by:

- Identifying and creating where needed, supplemental instructional materials to support the standards through openly licensed, free resources.
- Creating opportunities for districts to network and sharing promising practices during implementation.
- Providing 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;
- procure materials to teach the course;
- provide educators with professional learning.

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

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

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: Rule Options
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

581-022-2010
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 Rule Options

(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

Options	Draft Rule Language
Option 1: Flexible integration	(2) Districts shall award 0.5 credit in Personal Financial Education for Personal Financial Education courses that address all of the State Board Adopted Content Standards for the subject 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 Personal Financial Education with other content standards. (b) Districts may award credit in more than one content area for Personal Financial Education content standards when integrated with other content standards. (c) Districts may offer these courses as part of a college-credit granting opportunity, provided the course meets the content standards.

	(3) Districts shall award 0.5 credit in Higher Education and Career Path Skills for Higher Education and Career Path Skills courses that address all of the State Board Adopted Content Standards for the subject 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 with other content standards. (b) Districts may award credit in more than one content area for Higher Education and Career Path Skills content standards when integrated with other content standards. (c) Districts may offer these courses as part of a college-credit granting opportunity, provided the course meets the content standards.
Option 2: Hybrid; standalone for PFE and two-way for HECPS	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.
Option 3: Legislative Intent	(2) Districts shall award 0.5 credit in Personal Financial Education for courses that address all of the State Board Adopted Content Standards for the subject in accordance with OAR 581-022-2025 Credit Options.

(standalone for both)	(a) Districts may award credit in more than one content area for a Personal Financial Education course that integrates other content standards. (b) Districts may offer these courses as part of a college-credit granting opportunity. (3) Districts shall award 0.5 credit in Higher Education and Career Path Skills for courses that address all of the State Board Adopted Content Standards for the subject in accordance with OAR 581-022-2025 Credit Options. (a) Districts may award credit in more than one content area for a Higher Education and Career Path Skills course that integrates other content standards. (b) Districts may offer these courses as part of a college-credit granting opportunity.

(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.**

Second Reading of Rules Related to Personal Financial Education and Higher Education & Career Path Skills

June 13, 2024

Aujalee Moore, Beth Wigham, and Alexa Pearson
Office of Teaching, Learning, and Assessment
ODE.StateGraduationRequirements@ode.oregon.gov

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Course Requirements for Personal Financial Education & Higher Education and Career Path Skills

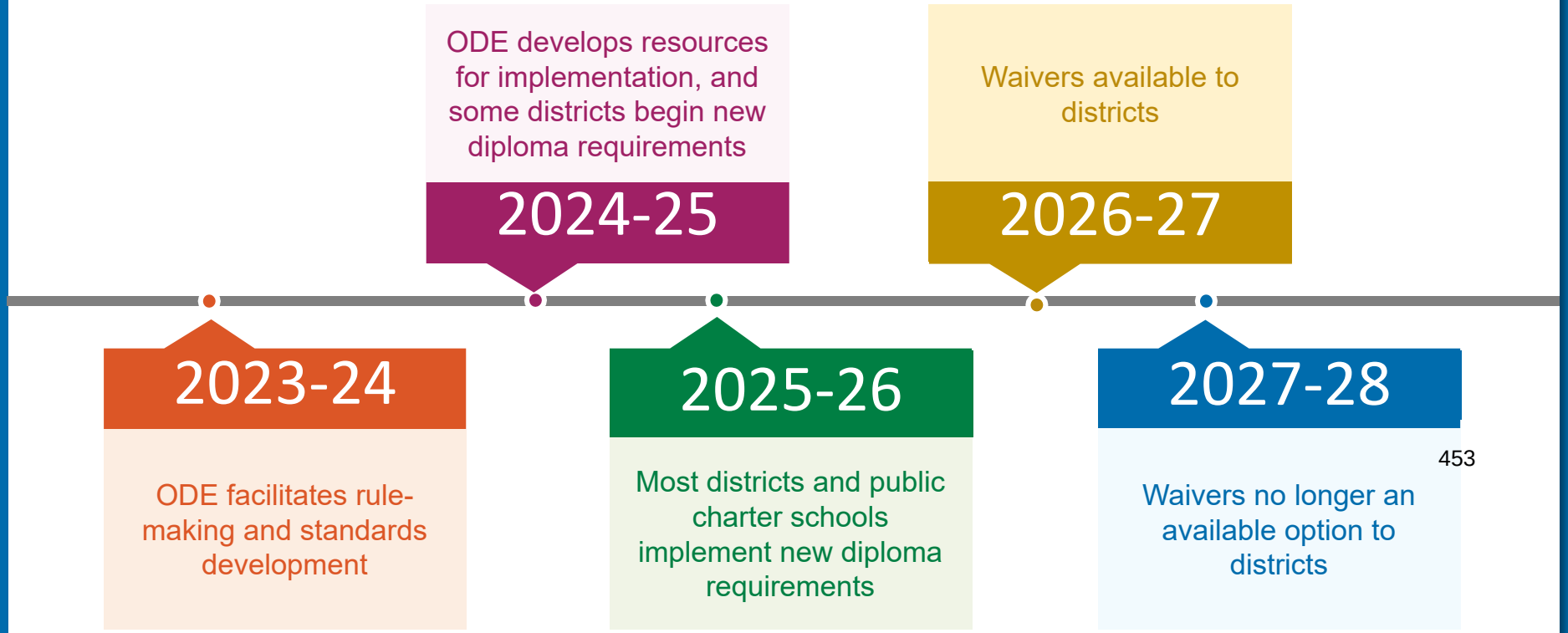
Subject: Oregon's Newest High School Diploma Requirements

Concept: The bill directs the State Board of Education to adopt content standards for 0.5 credit of higher education and career path skills and 0.5 credit of personal financial education as part of the 24 credit requirements for a high school diploma.

Background:

- Districts must ensure that students who will be awarded high school diplomas on or after January 1, 2027 are able to satisfy these credit requirements.
- Districts may request a waiver if they are 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, the waiver is for one year only.

Anticipated Timeline for Implementation



Rule	Technical	Programmatic	Permanent
Definitions 581-022-0102	✔	X	✔
Diploma Requirements OAR 581-022-2000	✔	X	✔
Modified Diploma OAR 581-022-2010	✔	X	✔
District Curriculum OAR 581-022-2030	✔	X	✔
Career Education OAR 581-022-2055	✔	X	✔
New OAR: Who Can Teach, Course Requirements, and Waiver Process for Personal Financial Education and Higher Education and Career Path Skills	X	✔	X

Engagement Since First-Read

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April State Board of Education First-Read

“Option A” (Most Flexible)

(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 Higher Education and Career Path Skills and/or Personal Financial Education 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.

“Option B” (Standalone for PFE-only)

(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.

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(b) Districts may offer these courses as part of a college-credit granting opportunity, provided the course meets the content standards.

Rulemaking Feedback (April-June)

April-June Public Feedback Submitted to State Board of Education

May 21st Oregon Administrative Rules Hearing

May 30th Legislative Council Opinion & Senate Education Committee

June 6th Second Read at Rules Advisory Committee

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Proposed OAR Language

Sections of the New OAR



The proposed new OAR includes three sections that cover the following:

(1) Who can teach the course

(2) Course and Credit Options

(3) Waiver process

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Section 1: Licensure - Who Can Teach The Course

(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

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Section 2: Option A (Flexible Integration)

(2) Districts shall award 0.5 credit in Personal Financial Education for Personal Financial Education courses that address all of the State Board Adopted Content Standards for the subject 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 Personal Financial Education with other content standards.

(b) Districts may award credit in more than one content area for Personal Financial Education content standards when integrated with other content standards.

(c) Districts may offer these courses as part of a college-credit granting opportunity, provided the course meets the content standards.

(3) Districts shall award 0.5 credit in Higher Education and Career Path Skills for Higher Education and Career Path Skills courses that address all of the State Board Adopted Content Standards for the subject 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 with other content standards.

(b) Districts may award credit in more than one content area for Higher Education and Career Path Skills content standards when integrated with other content standards.

(c) Districts may offer these courses as part of a college-credit granting opportunity, provided the course meets the content standards.

Section 2: Option B (Hybrid Option)

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.

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Section 2: Option C (Two Stand-Alone Courses)

(2) Districts shall award 0.5 credit in Personal Financial Education for courses that address all of the State Board Adopted Content Standards for the subject in accordance with OAR 581-022-2025 Credit Options.

(a) Districts may award credit in more than one content area for a Personal Financial Education course that integrates other content standards.

(b) Districts may offer these courses as part of a college-credit granting opportunity.

(3) Districts shall award 0.5 credit in Higher Education and Career Path Skills for courses that address all of the State Board Adopted Content Standards for the subject in accordance with OAR 581-022-2025 Credit Options.

(a) Districts may award credit in more than one content area for a Higher Education and Career Path Skills course that integrates other content standards.

(b) Districts may offer these courses as part of a college-credit granting opportunity.

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Section 3: Waiver Process

(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.

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(a) **Waivers may be approved at the Oregon Department of Education's discretion**. **Denied waivers may be appealed to the State Board of Education.**

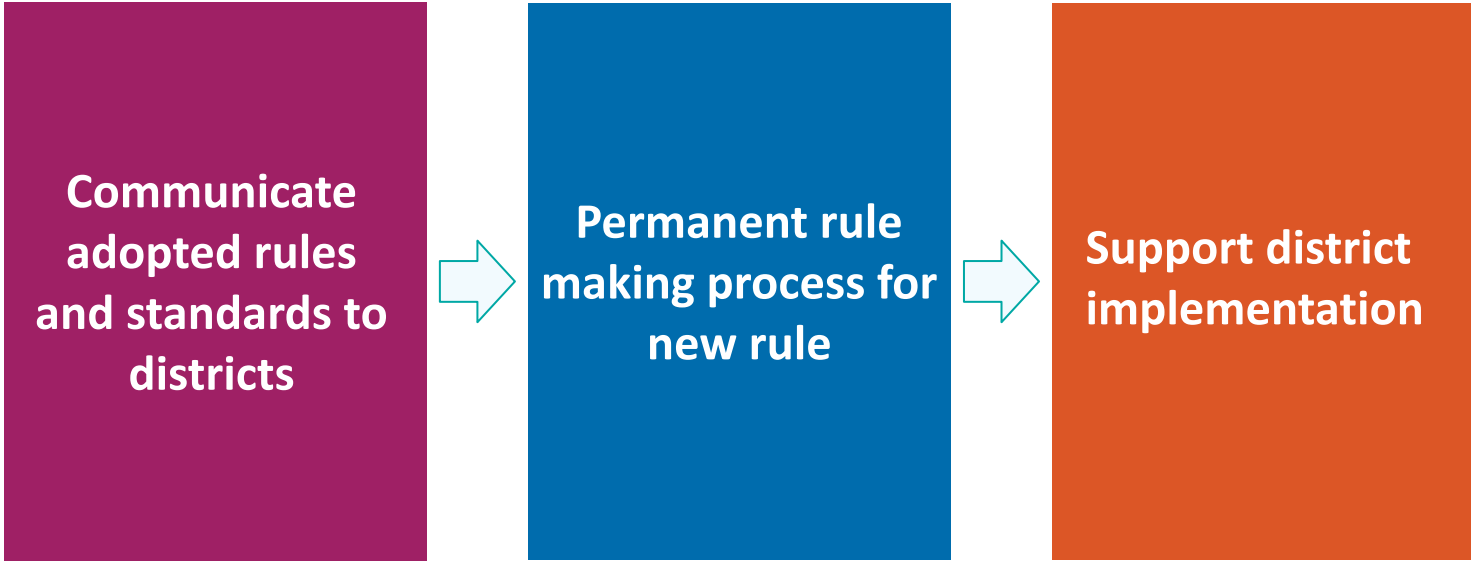
(b) Waivers must be submitted to the Oregon Department of Education **no later than July 1, 2026**.

(c) **No waivers shall be granted for students graduating on or after January 1, 2028.**

Next Steps

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Next Steps: Implementing Rules and Standards



466



Thank you!

ODE.StateGraduationRequirements@ode.oregon.gov

Oregon State Board of Education
June 13, 2024
AGENDA ITEM: 7.B.

SUBJECT: Native Hawaiian/Pacific Islander Student Success Grant Program Permanent Rules; Temporary OAR 581-017-0850 to 017-0875 **STAFF NAME & OFFICE**: Carol K. Matsuzaki, Native Hawaiian/Pacific Islander Student Success Coordinator, Office of Equity Diversity and Inclusion During the 2023 legislative session, the Oregon Department of Education was provided $2M in funding through House Bill 3144 for a grant program which supports the implementation of the Native Hawaiian/Pacific Islander Student Success Plan strategies. The requested permanent rule set will allow for the grant program's establishment and implementation. The rule language is rooted in 8 community engagement sessions, Rules Advisory Committee feedback, and an internal ODE review. This is the first time that this rule set is being presented for permanent rules. **X** New Rule ☐ Amend Existing Rule ☐ Repeal Rule	☐ **First Reading** ☐**Presentation** ☐**No Presentation** **X Action** ☐**Temp Rule** **X Presentation** ☐**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. The passage of House Bill 3144 (HB 3144) during the 2023 legislative session provided funding for the implementation of the Native Hawaiian/Pacific Islander Student Success Plan (NHPI SSP), the assembly of a statewide advisory group, and $2 Million for the creation of the grant program. The permanent rules being presented today will allow for the establishment and implementation of the grant program.
    b. What is the current requirement in rule or statute?
        i. ORS 329.849 and HB 3144 (2023) are the statutory base for the currently adopted temporary OARs (OAR 581-017-0850 to 581-017-0875) for this grant program.
    c. Why is this rule being brought forward right now?
        i. To adopt permanent rules for the establishment and implementation of the grant program, before temporary rules expire on August 13, 2024.
2. Purpose
    a. What function does the current rule hold?
        i. The temporary rules (OAR 581-017-0850 to 581-017-0875) set out requirements for the grant program. Temporary rules expire on August 13, 2024.
    b. How long has the rule been in place?

i. The temporary rules (OAR 581-017-0850 to 581-017-0875) were adopted February 16, 2024 and are effective through August 13, 2024.

3. Does the board have any areas of discretion or is this strictly mirroring statute?
    a. If the board does have discretion, those areas should be called out here or in the next section.
        i. The rule set closely follows statute and aligns with other Oregon Department of Education (ODE) Student Success Plan grant program rules; however, the board does have discretion.

4. Stakeholder voice/input (individual and collective i.e., groups)
    a. Who was involved in bringing this to the Board? What did engagement in this process entail?
        i. ODE assembled a statewide advisory group comprised of individuals who identify as being Native Hawaiian/Pacific Islander and they have been involved in this work.
        ii. There is an immediate need to request that temporary rules be made permanent to move forward with distributing the first round of grant funding to the first cohort of Native Hawaiian/Pacific Islander Student Success Plan (NHPI SSP) grantees in 2024.
        iii. Youth engagement for the plan consisted of two engagement sessions between February and May 2024 in Multnomah and Lane counties.

    b. What did engagement in this process entail?
        i. In addition to the engagement process for the plan development, ODE held additional engagement sessions focused on temporary rule development that were attended by youth, educators, administrators, and parents, as well as representatives of nonprofit organizations and community based organizations. Opportunities to provide feedback were facilitated by small groups.
        ii. Feedback from the Winter-Spring 2024 temporary rule engagement sessions have been incorporated into the proposed permanent rules. These sessions were attended by families, students, K-12 and post-secondary educators, school administrators, agency, and community-based organization partners. Opportunities to provide feedback were facilitated by small groups.
        iii. Today's second-read of permanent rules are rooted in feedback from all eleven community engagement sessions, the NHPI Advisory Group and feedback from the Rules Advisory Committee in May and June.

    c. Who may be affected by this?
        The grant program is designed to identify best practices to achieve the objectives of the Native Hawaiian/Pacific Islander Student Success Plan (NHPI SSP) intended to improve the Oregon education systems to better serve Native Hawaiian/Pacific Islander students, therefore improving the quality of education for all students.
    d. Whose voice is missing?

The feedback provided is inclusive of student, parent, grandparent, advocate and educators voices.

e. What additional information does the Board need prior to moving forward?
Permanent rules are being presented for a second time to allow the Department to begin the grant application process as soon as possible thus ensuring that program funds can be allocated during the 2023-2025 biennium. Permanent rules are necessary to ensure there is not a period of lapse between when the temporary rules expire on August 13, 2024.

SUMMARY OF PREVIOUS BOARD ACTION

1. Has this been before the board before? If so, what action did the board take?
Yes, Temporary OARs have been presented and were adopted by the board in February 2024 and presented again in May for a first reading of Permanent rules.

HAS THE RULE CHANGED SINCE LAST BOARD MEETING?

☐ N/A; first read—hasn't been before board
☐ No; same as last month
X Yes – As follows (changes in red):

(10) (A) "Plan Student" means a student enrolled in early childhood through post-secondary educational programs who:

(a) Self-identifies as Native Hawaiian/Pacific Islander; and

(b) Has experienced disproportionate results in education due to historical practices and policies as may be further identified by the State Board of Education by rule.

(B) For the purposes of this definition, "enrolled" means:

(a) enrollment in a school district PK-12 educational program~~; or~~

~~(b) enrollment in a state-funded K-12 educational program, which includes but is not limited to educational programs provided by or in the following institutions: public charter schools, education service districts, long term care and treatment facilities, the Youth Corrections Education Program, the Oregon School for the Deaf, and Juvenile Detention Education Programs.~~

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?
   Through the community engagement processes described above, ODE has engaged with Native Hawaiian/Pacific Islander (NHPI) advocates across the state and in a variety of contexts.

b. Who are the historically underserved groups affected?
The plan is designed to support Native Hawaiian/Pacific Islander students. The community engagement sessions highlighted that NHPI students have not been served and therefore are un-served, and consequently, their needs must be uplifted.

c. Has there been consultation or collaboration with tribes in this rule change or policy decision?
There has not been any official tribal consultation or collaboration conducted.

d. How has the Oregon Department of Education modified or enhanced the rule change or policy decision to address the needs of historically underserved communities?
The development and presentation of a permanent rule set to implement the NHPI SSP grant program is evidence.

2. Negative/Positive Effects
   a. What is the impact on the population most affected by this rule that the board should consider?
   The department is hopeful that this ruling will lead to increased programming to support Native Hawaiian/Pacific Islander students and families across the state as well as allow the state to identify best and promising practices for accomplishing the statutory objectives of the Native Hawaiian/Pacific Islander Student Success Plan (NHPI SSP) that can be scaled up and implemented across the state by Local Education Agencies to improve Oregon's education system.
   b. What possible opportunities, assets or access could this rule provide?
   The rule is designed to establish the parameters for distribution of Grants in Aid funding allocated by the Oregon Legislature for the purpose of identifying best and promising practices for accomplishing the statutory objectives of the Native Hawaiian/Pacific Islander Student Success Plan (NHPI SSP).
   c. What is the impact on eliminating the opportunity or achievement gap?
   The program is designed to address the achievement gaps for NHPI students.
   d. Have all the potential unintended consequences been considered?
   While all potential consequences are impossible to predict, through engagement with the community and ODE constituents, the team believes this rule set has been designed to eliminate all foreseeable unintended consequences.
   e. Does this rule advance the ESSA goals?
   Yes

3. What are the barriers to more equitable outcomes, either:
   a. State or federally mandated?
   b. Political?
   There may be opposition to the rule's focus on supporting NHPI students with some groups.
   c. Emotional?
   Ongoing discrimination against NHPI students in the schools has been shown to have disproportionately higher negative academic and emotional outcomes,

which may pose challenges to grantees and the youth they serve within program implementation.

d. Financial?
e. Programmatic?
f. Language?

NHPI students and families often experience language barriers when filling out forms and receiving information from schools which leads to a lack of communication and understanding.

g. Geography?

This OAR is intended to support grantees whose geographic region has fewer demonstrated support for NHPI students.

h. Size?

EQUITY IMPACT ANALYSIS

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

1. How are historically unserved populations impacted by this docket item?
   a. Demonstrate how the rule changes, policy, or action could produce other unintended consequences not listed in the docket.
   This rule set is designed to support the needs of NHPI students and families and is based on community and internal ODE engagement.
   b. Refer to *Policy Issue or Concerns* and identify the historically unserved populations affected. Conduct a reflection and examination, which will and should answer 1a.
   The Native Hawaiian/Pacific Islander populations will be affected by this rule set and through community engagement, a big takeaway was that many students are not under-served, they are in fact are un-served.

2. Examine the impact of the rule changes, policy, or action on historically unserved populations in Oregon. Describe this ongoing and/or foreseeable impact, using as much detail as possible.
   The plan provides strategies and goals to work toward addressing the educational needs of plan students which the grant program will allocate funding for programming to support. The plan is being developed and aligned with legislative objectives outlined in HB 3144.

3. Explain how the rule change, policy or action works toward improving achievement, opportunities and a sense of worthiness for underserved students?
   The NHPI SSP is designed to support the achievements, opportunities, and sense of belonging for NHPI students across Oregon. This grant program will allow for the implementation of programming in a wide array of local communities that will support the plan's strategies.

FISCAL ANALYSIS

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

1. How does the proposed rule fit within the budget of the agency?
    a. Which units/divisions/offices will be impacted and how?
        i. These permanent rules allow for the expenditure of Grants in Aid funding allocated to the agency for this purpose.
        ii. The grant program funds will be allocated to eligible entities through the Office of Equity, Diversity, and Inclusion within ODE.
2. How does the proposed rule change impact school districts and ESDs?
    The rule will provide Early Learning Hubs, providers of early learning services, school districts, Educational Service Districts, post-secondary institutions of education, Tribal governments, Community Based Organizations or a consortium of these entities, the opportunity to apply for funding for programming that achieves the objectives of the identify best and promising practices for accomplishing the statutory objectives of the Native Hawaiian/Pacific Islander Student Success Plan (NHPI SSP). Through the implementation of the NHPI SSP grant program, best and promising practices will be identified for the purpose of scaling across local education agencies throughout the state to improve Oregon educational systems to better serve NHPI youth.

3. How does the proposed rule change impact schools and other educational institutions?
    These permanent rules set up a grant program that affirms Native Hawaiian/Pacific Islander students and helps address the needs identified in the NHPI SSP.

4. Does the proposed rule change impact other stakeholders?
    Yes, the proposed rule will allow Early Learning Hubs, providers of early learning services, school districts, Educational Service Districts, post-secondary institutions of education, Tribal governments, Community Based Organizations or a consortium of these entities, the opportunity to apply for funding to support programming in their local community that align to the goals of the NHPI SSP.

EFFECT OF A "YES" OR "NO" VOTE

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

The temporary rules for this program expire on August 13, 2024. If the Board approves the permanent rules, the department will be able to move forward with the RFA process through both procurement and DOJ in a timely manner to allow grants to be provided during the 2023-2025 biennium. If the permanent rules are not approved during this meeting, for a second meeting and adoption at the June SBE meeting, it is unlikely that the RFA process for grants will be able to be completed during the 2023-2025 biennium.

STAFF RECOMMENDATION

Oregon State Board of Education
June 13, 2024
AGENDA ITEM: 7.B.

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

ATTACHMENTS

Attachment 1:

PERMANENT RULES IMPLEMENTING HOUSE BILL 3144 (2023)

A racial equity statement:

> The Native Hawaiian and Pacific Islander student populations represent the highest percentages of negative academic indicators in the Oregon public-school system. Rules to support a grant program that addresses the specific educational needs of these students is of utmost importance and will be further supported through the Native Hawaiian/Pacific Islander Student Success Plan. This rule set directly speaks to building racial equity across a population of students who have long been invisible to the educational system.

A fiscal/small business impact statement

> The rules will provide Early Learning Hubs, providers of early learning services, school districts, Educational Service Districts, post-secondary institutions of education, Tribal governments, Community Based Organizations or a consortium of these entities, the opportunity to apply for funding to support programming that directly impacts the Native Hawaiian and Pacific Islander communities and is in alignment with the Native Hawaiian/Pacific Islander Student Success Plan strategies.
>
> The fiscal impacts of this rule set on small businesses in Oregon have the potential to be far-reaching as grantees who are at the local or community levels may increase spending to hire staff, procure supplies and equipment, provide culturally relevant resources, and offer services to Native Hawaiian and Pacific Islander students and families.

House Bill 3144 (2023) requires Oregon Department of Education (ODE) to develop and implement a statewide education plan for students enrolled in early childhood through postsecondary education who are:

- Native Hawaiian and/or Pacific Islander, and
- Have experienced disproportionate results in education due to historical practices, as identified by the State Board of Education by rule.

ODE is presenting the rules below to comply with these requirements and has sought ~~is seeking~~ input from internal constituents, the Native Hawaiian/Pacific Islander (NHPI) Advisory Group, students and community members regarding these rules to ensure that the NHPI Student Success Plan (SSP) Grant Program will be successfully implemented.

Questions and feedback can be directed to Carol.matsuzaki@ode.oregon.gov

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Native Hawaiian/Pacific Islander Student Success Plan Grant Program: Definitions

The following definitions apply to OAR 581-017-0850 to 581-017-0875:

(1) “Native Hawaiian/Pacific Islander Student Success Plan Grant” or “Grant” means a Grant established under ORS 329.849

(2) “Community-Based Organization” means a nonprofit organization that is representative of a community or significant segments of a community, and that is located within or in close proximity to the community it serves.

(3) “Community Voice” means that members representing the community served by the project, including students, will be involved in co-constructing the project design, implementation, and/or providing strategic guidance in final decision-making.

(4) “Culturally Responsive” means the implicit recognition and incorporation of the cultural knowledge and experience of students served by the plan in teaching, learning and assessment. This includes identifying and valuing: students’ cultural assets in instruction and assessment; diverse frames of reference that correspond to multifaceted cultural perspectives/experiences; and performance styles in the classroom that do not reflect dominant values of achievement or success.

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

(6) “Disproportionate Discipline” means disproportionate rates of suspensions and expulsions for Native Hawaiian/Pacific Islander students compared to their white classmates who commit similar infractions and who have similar discipline histories.

(7) “Evidence-based” means practices with a proven record of success based on reliable, trustworthy, and valid evidence that when the practices are implemented with fidelity, students can be expected to make adequate gains in early literacy. Instructional practices, activities, strategies, or interventions that are “evidence-based” should not just privilege scientific evidence, but also be driven by evidence stemming from the perspectives of those affected by those practices, activities, strategies, or interventions such as:

a. Evidence of Tribal consultation, recommendations, and experiences of American Indian/ Alaska Native community members or Tribal government.
b. Evidence of community-driven, culturally responsive/sustaining/specific, non-dominant and non-Western ways of knowing, being, and researching.

(8) “Opportunity gap” refers to the effects and disparities the dominant, White supremacist system and culture has historically, currently, and intentionally created for groups of students where factors such as race, ethnicity, socioeconomic status, English proficiency, geography, financial wealth, gender, sexuality, familial situations, and disabilities determine or constrain what opportunities the system offers and how these affect their educational aspiration, achievement, and attainment. These effects and disparities form an educational debt that the dominant educational system owes to marginalized students and a need to address and shift the system itself.

(9) “Partnership” means a group of organizations, Tribal governments, districts or individuals who agree to work together with a common interest and shared vision. In a partnership, there is a high level of trust and 2-way communication, and differences in power and privilege are addressed. Roles and responsibilities on all sides are well-defined and developed with shared authority in decision making. There might be shared space and staff, with expectations and agreements in writing.

(10) (A) “Plan Student” means a student enrolled in early childhood through post-secondary educational programs who:

(a) Self-identifies as Native Hawaiian/Pacific Islander; and

(b) Has experienced disproportionate results in education due to historical practices and policies,

as may be further identified by the State Board of Education by rule.

(B) For the purposes of this definition, “enrolled” means:

(a) enrollment in a school district K-12 educational program; or

(b) enrollment in a state-funded early childhood program, K-12 educational program, or post-secondary education program which includes but is not limited to

educational programs provided by or in the following institutions: public charter schools, education service districts, Llong Tterm Ccare and Ttreatment facilities, the Youth Corrections Education Program, the Oregon School for the Deaf, and Juvenile Detention Education Programs.

Commented [MO1]: Will discuss at RAC on 6/6 to determine best approach for this section

Statutory/Other Authority: ORS 338.155 & ORS 329.849
Statutes/Other Implemented: ORS 329.849

Native Hawaiian/Pacific Islander Student Success Plan Grant Program: Establishment

OAR 581-017-0855: Establishment

(1) There is established the Native Hawaiian/Pacific Islander Student Success Plan Grant Program to support early learning hubs, providers of early learning services, school districts, education service districts, post-secondary institutions of education, community-based organizations, Tribal governments, or a consortium of these entities.

(2) Programs and services provided under a Grant must address one or more of the strategies or objectives included in the Native Hawaiian/Pacific Islander Student Success Plan.

(3) Subject to available funds, the Department of Education shall award Grants based on a detailed description of proposed programming or services. The programs or services may include:

(a) The scale-up of an existing program or project; and/or

(b) The implementation of a new program or project.

(4) The purpose of the Grant program is to provide funds to applicants that document an understanding of the unique needs of Native Hawaiian/Pacific Islander students, have the potential to become exemplar programs, and who create collaborative practices relating to strategies outlined in the Native Hawaiian/Pacific Islander Student Success Plan.

Statutory/Other Authority: ORS 329.849
Statutes/Other Implemented: ORS 329.849

Native Hawaiian/Pacific Islander Student Success Plan Grant Program: Eligibility

OAR 581-017-0860: Eligibility

(1) The Department will establish a process for eligible entities to apply for a Native Hawaiian/Pacific Islander Student Success Grant.

(2) To be eligible to receive a Grant, an applicant must:

(a) Be an early learning hub, provider of early learning services, school district, education service district, public charter school, post-secondary institution of education, community-based organizations, Tribal governments, or a consortium of these entities;

(b) Demonstrate the outcomes of the proposed project are to benefit and serve Plan Students and their families; and

(c) Demonstrates alignment between the project and the strategies of the Native

Hawaiian/Pacific Islander Student Success Plan.

Statutory/Other Authority: ORS 338.155 & ORS 329.849
Statutes/Other Implemented: ORS 329.849

Native Hawaiian/Pacific Islander Student Success Plan Grant Program: Criteria

OAR 581-017-0865: Criteria

(1) The Department will award Grants to eligible entities based on the following criteria:

(a) Whether the proposed project successfully implements the strategies provided in the Native Hawaiian/Pacific Islander Student Success Plan;

(b) Whether the applicant authentically and consistently engages Community Voice in the proposed project; and

(c) Whether the applicant demonstrates equitable distribution of Grant funds and resources in Partnership.

Statutory/Other Authority: ORS 329.849
Statutes/Other Implemented: ORS 329.849

Native Hawaiian/Pacific Islander Student Success Plan Grant Program: Funding

OAR 581-017-0870: Funding

(1) Applicants must submit a detailed budget that explains how Grant funds will be used.

(2) Indirect costs will be allowed as a percentage of the Grant funds disbursed as follows:

(a) Up to five percent for school districts, educational service districts, early learning hubs, or post-secondary institutions of education; or

(b) Up to fifteen percent for community-based organizations or providers of early learning services.

(c) For Tribal governments, up to fifteen percent or the Tribal governments federally recognized indirect rate, as provided in the grant agreement; or

(d) Administrative costs for partnerships or consortiums will be allowed based on the lead entity's organization type.

(3) Applicants may use Grant funds only for authorized purposes.

Statutory/Other Authority: ORS 338.155 & ORS 329.849
Statutes/Other Implemented: ORS 329.849

Native Hawaiian/Pacific Islander Student Success Plan Grant Program: Reporting

OAR 581-017-0875: Reporting
Grant recipients must report project or program outcomes in the manner and form required by the Department.

Statutory/Other Authority: ORS 329.849
Statutes/Other Implemented: ORS 329.849

Native Hawaiian/Pacific Islander Student Success Plan Grant Program Permanent Rulemaking

480

Carol K. Matsuzaki (‘oia)
Office of Equity, Diversity and Inclusion
carol.matsuzaki@ode.oregon.gov

Native Hawaiian/Pacific Islander Student Success Plan Grant Program Permanent Rulemaking

Subject: Native Hawaiian/Pacific Islander Student Success Plan Grant Program

Concept: House Bill 3144 (2023) directs the Oregon Department of Education to develop and implement a statewide education plan for Native Hawaiian and Pacific Islander students.

Background:

- The Native Hawaiian/Pacific Islander Student Success Plan (NHPI SSP) is for use across all state and local entities.
- The NHPI SSP grant program will award grants to Early Learning Hubs, providers of early learning services, school districts, education service districts, post-secondary institutions of education, Tribal governments, community-based organizations or a consortium of these entities to implement the strategies provided in the plan.
- The plan addresses:
  - Disparities experienced by NHPI students in every indicator of academic success, as documented by the department's statewide report card and other relevant reports related to plan students;
  - Historical practices leading to disproportionate outcomes for NHPI students; and
  - Educational needs of NHPI students from early childhood through post-secondary education as determined by examining culturally appropriate best practices in this state and across the nation
- There have been a total of 11 community engagement sessions

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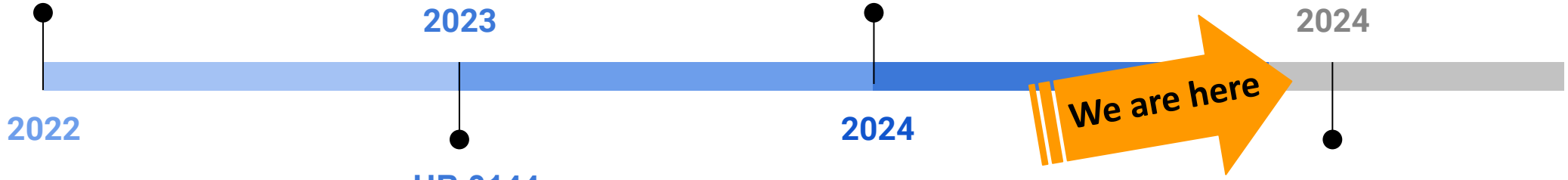
Native Hawaiian/Pacific Islander Student Success Plan Grant Program Permanent Rulemaking

FTE

FTE for Ed Spec provided in omnibus bill.

Temp Rule Engagement & Adoption, and Permanent Rule Engagement

Presentations to RAC and SBE, Temporary rules adopted, in-person and online community engagement for permanent rules.



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HB 3144

In legislative session 2023, HB 3144 passed. ODE awarded GIA.

Permanent Rule Adoption Grants

Presentations to RAC and SBE for permanent rules. ODE intends to solicit awardees for aligned to interim SSP to expend $2mil in GIA provided for the 24-25 SY.

Native Hawaiian/Pacific Islander Student Success Plan Grant Program Permanent Rulemaking

Feedback heard:

- Need to ensure equity across grants awarded
- Concern around clarity of the scope of the grant program
- Gratitude for being included in such impactful work

Language updated

Definitions OAR 581-017-0850

Language retained:

Establishment, OAR 581-017-0855
Eligibility, OAR 581-017-0860
Criteria, OAR 581-017-0865
Funding, OAR 581-017-0870
Reporting, OAR 581-017-0875

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Larger Implementation Need: Collect, analyze, and disseminate disaggregated data that reflects the diverse Native Hawaiian /Pacific Islander cultural identities in our education system

Original Temporary Rule Language

(10) (a) “Plan Student” means a student enrolled in early childhood through post-secondary education who:
(b) For the purposes of this definition, “enrolled” means:
(A) enrollment in a school district K-12 educational program; or
(B) enrollment in a state-funded K-12 educational program, which includes but is not limited to educational programs provided by or in the following institutions: public charter schools, education service districts, long term care and treatment facilities, the Youth Corrections Education Program, the Oregon School for the Deaf, and Juvenile Detention Education Programs.

Proposed Rule Change

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After extensive collaboration with community, we propose keeping “educational programs” consistent throughout, adding in P(K-12) and removing the list of programs, all of which are denoted in red.

(10) (A) “Plan Student” means a student enrolled in early childhood through post-secondary educational programs who:
(a) Self-identifies as Native Hawaiian/Pacific Islander; and
(b) Has experienced disproportionate results in education due to historical practices and policies as may be further identified by the State Board of Education by rule.
(B) For the purposes of this definition, “enrolled” means:
(a) enrollment in a school district PK-12 educational program~~; or~~
~~(b) enrollment in a state-funded K-12 educational program, which includes but is not limited to educational programs provided by or in the following institutions: public charter schools, education service districts, long term care and treatment facilities, the Youth Corrections Education Program, the Oregon School for the Deaf, and Juvenile Detention Education Programs.~~

Proposed Rule Change

(10) (A) “Plan Student” means a student enrolled in early childhood through post-secondary educational programs who:

(a) Self-identifies as Native Hawaiian/Pacific Islander; and

(b) Has experienced disproportionate results in education due to historical practices and policies as may be further identified by the State Board of Education by rule.

(B) For the purposes of this definition, “enrolled” means:

(a) enrollment in a school district PK-12 educational program*; or*

(b) enrollment in a state-funded K-12 educational program, which includes but is not limited to educational programs provided by or in the following institutions: public charter schools, education service districts, long term care and treatment facilities, the Youth Corrections Education Program, the Oregon School for the Deaf, and Juvenile Detention Education Programs.

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Native Hawaiian/Pacific Islander Rulemaking

Proposed Rule Changes: Definition for “enrolled”

Proposed Rule Impacts:

- **Racial Equity:** This rule set significantly impacts Native Hawaiian/Pacific Islander students by addressing the urgent need to cultivate racial equity within a demographic that has long endured marginalization within the education system.
- **Fiscal/Economic & Small Business Impact:** ODE recognizes the importance of uplifting organizations that cater to students identifying as Native Hawaiian/Pacific Islander. This grant program is designed to allocate funding to such entities, with the overarching goal of enhancing educational opportunities for communities.

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Next Steps:

- Adoption of permanent rules to institute the Native Hawaiian/Pacific Islander Student Success Plan grant program.

Mahalo for your time and thoughtful consideration



Oregon State Board of Education
June 13, 2024
AGENDA ITEM: 7.C.

SUBJECT: Immigrant and Refugee Student Success Plan (Senate Bill 1532); Definitions OAR 581-017-XXXX to 581-017-XXXX; 581-017-XXXX Establishment; 581-017-XXXX Eligibility; 581-017-XXXX Criteria; 581-017-XXXX Funding; 581-017-XXXX Reporting **STAFF NAME & OFFICE**: Deb Lange, Assistant Superintendent Susy Mekarski, Latino/a/x and Indigenous SSP Coordinator The purpose of coming before the Oregon Department of Education State Board of Education is to share proposed temporary rules for the Immigrant and Refugee Student Success Plan that is to be established under Senate Bill 1532. Areas that are addressed in these temporary rules are: the temporary OARs for Definitions; Establishment; Eligibility; Criteria; Funding; Reporting. During the 2024 legislative session, the Oregon Department of Education was provided $4M is GIA per biennium, with $2M in funding provided for the last year of the 23-25 biennium through Senate Bill 1532. This funding will establish a grant program which supports the implementation of the Immigrant and Refugee Student Success Plan strategies. The requested temporary rule set will allow for the grant program's establishment and implementation. This temporary rule language is rooted in three community engagement sessions and internal ODE review. This is the first time that this rule set is being presented for temporary rule adoption. Upon adoption of temporary rules, OEDI will seek adoption of permanent rules. ☒ New Rule ☐ Amend Existing Rule ☐ Repeal Rule	☐ **First Reading** ☐ **Presentation** ☐ **No Presentation** ☒ **Action** ☒ **Temp Rule** ☐ **Presentation** ☐ **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?

        The passage of Senate Bill 1532 (SB 1532) during the 2024 legislative session provided funding for the implementation of the Immigrant and Refugee Student Success Plan (I/R SSP), the assembly of a statewide advisory group, and the $4M in GIA provided per biennium beginning in 2025-27, with $2M in funding provided for the last year of the 23-25 biennium. The temporary rules being presented today will allow for the start of establishment and implementation of the grant program.

    b. What is the current requirement in rule or statute?

SB 1532 (2024) is the statutory base for the proposed temporary OARs for this grant program.

C. Why is this rule being brought forward right now?

To adopt temporary rules for the establishment and implementation of the grant program. Upon adoption of temporary rules, OEDI will seek adoption of permanent rules.

2. Purpose
    a. What function does the current rule hold?

    These temporary rules will establish requirements for ODE staff to implement the grant program under SB 1532.

    b. How long has the rule been in place?

    This is the first time that we are coming before the Board for the development of the Temporary Rules.

3. Does the board have any areas of discretion or is this strictly mirroring statute?
    a. If the board does have discretion, those areas should be called out here or in the next section.

    The temporary rules closely follow the statute and align with previous Oregon Department of Education (ODE) Student Success Plan grant program temporary rules; however, the board does have discretion.

4. Stakeholder voice/input (individual and collective i.e., groups)
    a. Who was involved in bringing this to the Board?
        i. ODE has engaged relevant ODE staff, as well as two statewide groups composed of individuals who have current experience supporting immigrant refugee communities in Oregon. ODE has engaged a Student Success Plan Advisory Group to gather feedback on these temporary rules and additional engagement sessions are planned to continue to socialize and gather feedback with Student Success Plan Advisory Groups to inform development of permanent rules.
        ii. There is an immediate need to request that temporary rules be allowed to move forward with the development of the Immigrant/Refugee Student Success Plan (I/R SSP) grantees in 2024 to expend GIA funds provided to ODE for the last year of the 23-25 biennium.

    b. What did engagement in this process entail?

    ODE held three engagement sessions focused on temporary rule development that were attended by educators, administrators, and parents, as well as representatives of nonprofit organizations and community based organizations. Opportunities to provide feedback were facilitated by small groups.

    c. Who may be affected by this?

    The grant program is designed to identify best practices to achieve the objectives of the Immigrant/Refugee Student Success Plan (I/R SSP) that is intended to improve Oregon education systems to better serve Immigrant/Refugee students, therefore improving the quality of education for all students.

d. Whose voice is missing potentially?
    i. Due to time constraints and when the various Student Success Plan Advisories meet, we are currently seeking input from the Latino/a/x and Indigenous* Student Success Plan Advisory, the Native Hawaiian/Pacific Islander Student Success Plan Advisory, and student voice. This feedback will inform the development of permanent rules.
    ii. Temporary rules and an interim Immigrant Refugee Student Success Plan are required to establish a grant program. ODE is convening a task force of key perspectives and community voices to inform the development of the Interim Immigrant Refugee Student Success Plan over the next weeks. This task force will also engage in review of the temporary rules and provide perspective and feedback to inform the development of permanent rules that ODE will seek adoption for before January of 2025.

e. What additional information does the Board need prior to moving forward?
    i. Temporary rules are being proposed in order to allow the Department to begin the Immigrant/Refugee Student Success Plan (I/R SSP) OAR development process as soon as possible thus ensuring that program funds can be allocated during the 2023-2025 biennium. As this work continues ODE staff will come before the Board in a following iteration to propose draft Permanent rules.

SUMMARY OF PREVIOUS BOARD ACTION

1. Has this been before the board before? If so, what action did the board take?
   Temporary OARs are being presented here for the first time.

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. Through the community engagement processes described above, ODE has engaged with Immigrant/Refugee Student Success Plan (I/R SSP) advocates across the state and in a variety of contexts.

b. Who are the historically underserved groups affected?
   i. The plan is designed to support Immigrant/Refugee students. The community engagement sessions highlighted that Immigrant/Refugee students and families have unique needs that make entering or accessing education challenging including: financial barriers such as housing instability or earning income for older students, safety and confidentiality concerns around immigration and asylum status, less support for older newcomer and ELL students who are at or nearing 18 or have recently graduated, lack of language supports in academic programs, specifically naming CTE, and supporting students who have been pushed out or are currently disengaged from 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. OEDI is committed to ongoing and deep engagement and alignment of Student Success Plans, which include the American Indian/Alaska Native Student Success Plan implemented out of the Office of Indian Educations.

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. The development and presentation of a temporary rule set to implement the Immigrant/Refugee Student Success Plan (I/R SSP) grant program is evidence.

2. Negative/Positive Effects
   a. What is the impact on the population most affected by this rule that the board should consider?
      i. The department is hopeful that this ruling will lead to increased programming to support Immigrant/Refugee students and families across the state as well as allow the state to identify best and promising practices for accomplishing the statutory objectives of the Immigrant/Refugee Student Success Plan (I/R SSP) that can be scaled up and implemented across the state by Local Education Agencies to improve Oregon's education system.

   b. What is the impact on eliminating the opportunity or achievement gap?
      i. This temporary rule is designed to establish the parameters for the various OARs that guide the Immigrant/Refugee Student Success Plan (I/R SSP) as well as the distribution of Grants in Aid funding allocated by the Oregon Legislature for the purpose of identifying best and promising practices for

accomplishing the statutory objectives of the Immigrant/Refugee Student Success Plan (I/R SSP).

c. Have all the potential unintended consequences been considered?
    i. The program is designed to address the achievement gaps for Immigrant/Refugee students.

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

3. What are the barriers to more equitable outcomes, either:
    a. State or federally mandated?
        None known/identified
    b. Political?
        There may be opposition to the rule's focus on supporting NHPI students with some groups.
    c. Emotional?
        i. Ongoing discrimination against Immigrant/Refugee students in the schools has been shown to have disproportionately higher negative academic and emotional outcomes, which may pose challenges to grantees and the youth they serve within program implementation.

4. Financial?
        i. The Immigrant/Refugee Student Success Plan (I/R SSP) will provide funding to support one of our most vulnerable populations; our Immigrant and Refugee students.

5. Programmatic?
        i. The Immigrant/Refugee Student Success Plan (I/R SSP) will provide funding to support one of our most vulnerable populations; our Immigrant and Refugee students.

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. If yes, describe how the rule changes, policy, or action could produce other unintended consequences not listed in the docket.

i. This rule set is designed to support the needs of Immigrant/Refugee students and families and is based on community and internal ODE engagement.

b. If no, refer to *Policy Issue or Concerns* and identify the historically underserved populations affected. Conduct a reflection and examination, which will and should answer 1a.
   i. The Immigrant/Refugee populations will be affected by this rule set

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.
   i. The Immigrant/Refugee populations will be affected by this rule set. Through the implementation of the Immigrant/Refugee Student Success Plan grant program, best and promising practices will be identified for the purpose of scaling across local education agencies throughout the state to improve Oregon educational systems to better serve Immigrant/Refugee youth.

3. Explain how the rule change, policy, or action works toward the elimination of either (one or both):
   a. the achievement gap
      i. The Immigrant/Refugee Student Success Plan (I/R SSP) is designed to support the achievements, opportunities, and sense of belonging for Immigrant/Refugee students across Oregon. This grant program will allow for the implementation of programming in a wide array of local communities that will support the plan's strategies.

   b. the opportunity gap
      i. The Immigrant/Refugee Student Success Plan (I/R SSP) is designed to support the achievements, opportunities, and sense of belonging for Immigrant/Refugee students across Oregon. This grant program will allow for the implementation of programming in a wide array of local communities that will support the plan's strategies.

FISCAL ANALYSIS

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

1. How does the proposed rule fit within the budget of the agency?
   a. Which units/divisions/offices will be impacted and how?
      i. These temporary rules allow for the expenditure of Grants in Aid funding allocated to the agency for this purpose.
      ii. The grant program funds will be allocated to eligible entities through the Office of Equity, Diversity, and Inclusion within ODE.

2. How does the proposed rule change impact school districts and ESDs?
    i. The rule will provide Early Learning Hubs, providers of early learning services, school districts, Educational Service Districts, post-secondary institutions of education, Tribal governments, Community Based Organizations or a consortium of these entities, the opportunity to apply for funding for programming that achieves the objectives of the identify best and promising practices for accomplishing the statutory objectives of the Immigrant/Refugee Student Success Plan (I/R SSP). Through the implementation of the Immigrant/Refugee Student Success Plan grant program, best and promising practices will be identified for the purpose of scaling across local education agencies throughout the state to improve Oregon educational systems to better serve Immigrant/Refugee youth.

3. How does the proposed rule change impact schools and other educational institutions?
    i. These temporary rules start to set up a grant program that affirms Immigrant/Refugee students and helps address the needs identified in the Immigrant/Refugee Student Success Plan (I/R SSP).

4. Does the proposed rule change impact other stakeholders?
    i. Yes, the proposed rule will allow Early Learning Hubs, providers of early learning services, school districts, Educational Service Districts, post-secondary institutions of education, Tribal governments, Community Based Organizations or a consortium of these entities, the opportunity to apply for funding to support programming in their local community that align to the goals of the Immigrant/Refugee Student Success Plan (I/R SSP).

EFFECT OF A "YES" OR "NO" VOTE

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

We are seeking the approval of these temporary rules for the Immigrant/Refugee Student Success Plan (I/R SSP) to embark on the work outlined/needed by SB1532. If the temporary rules are not approved during this meeting, it is unlikely that the RFA process for grants will be completed during the 2023-2025 biennium.

STAFF RECOMMENDATION

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

ATTACHMENTS

Attachment 1: Draft Rules for the Immigrant/Refugee Student Success Plan (I/R SSP)

Immigrant/Refugee Student Success Plan Draft Rules

581-017-XXXX Definitions [1]

The following definitions apply to OAR 581-017-XXXX to 581-017-XXXX:

(1) "Immigrant" is a categorical term that encompasses a range of lived experiences including but not limited to ~~means an~~ individuals who reside in the United Stated and were ~~was born in another country and permanently resides in the United States.~~ born in another country.

(2) "Asylum Seeker" means a person who has or is actively seeking protection and/or permanent relocation from inside of the U.S. due to having experienced grave danger because their home government is unwilling or unable to protect them or may be actively persecuting them.

(3) "Refugee" means a person who has or is actively seeking protection and/or permanent relocation from outside of the U.S. due to having experienced grave danger because their home government is unwilling or unable to protect them or may be actively persecuting them.

(4) "English Learner" means students who receive English language instruction, support, and services as part of an English language development (ELD) program as English learners.

(5) "Multilingual Learners" means students who speak multiple languages and may or may not be eligible to receive English language instruction, support as part of an English language development (ELD) program.

~~(6) Asexual means a person who does not experience sexual attraction, but could still experience other forms of attraction (e.g. emotional, intellectual).~~

~~(7) Agender means a person who does not identify with a specific gender or feels neutral when it comes to their gender identity.~~

~~(8) Bisexual means a person who is attracted to more than one gender.~~

~~(6) Cisgender means a person who feels their gender identity and expression align with the gender they were assigned at birth or by society.~~

(6~~9~~) Community-Based Organization means a nonprofit organization that is reflective of a community or significant segments of a community it seeks to serve.

(~~10~~7) Community Voice means that members representing the community served by the project will be involved in co-constructing the project design, implementation, and/or providing strategic guidance in final decision-making.

(~~11~~8) Culturally Specific Organization means an organization that serves a particular cultural community and is primarily staffed and led by members of that community; these organizations demonstrate: intimate knowledge of lived experience of the community, including but not limited to the impact of structural and individual racism or discrimination on the community; knowledge of specific disparities, barriers or challenges documented in the community and how that influences the structure of their program or service; commitment to the community's strength-based and self-

driven thriving and resilience; ability to describe and adapt their services to the community's cultural practices, health and safety beliefs/practices, positive cultural identity/pride, religious beliefs, etc.

(~~12~~9) Department means the Oregon Department of Education.

(10~~3~~) Disproportionate refers to unequal or inequitable differences in access and outcomes that historical and current-day White supremacy has created between certain families, children and students. What is "proportionate," however, must also be critically analyzed and addressed in terms of its values, intent, and ideology.

~~(14) Gay means a person who is attracted to a person of the same gender.~~

~~(15) Lesbian means a woman-identified person who is attracted to women.~~

~~(16) Non-binary/Genderqueer means people whose gender is not exclusively male or female, including those who identify with a gender other than male or female, as more than one gender, or as no gender.~~

(11) "LGBTQ2SIA+" means a term that encompasses multiple gender identities and 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.

(12~~7~~) Partnership means a group of organizations, Tribes, districts or individuals who agree to work together with a common interest and shared vision. In a partnership, there is a high level of trust and 2-way communication, and differences in power and privilege are addressed. Roles and responsibilities on all sides are well-defined and developed with shared authority in decision making. There might be shared space and staff, with expectations and agreements in writing.

(13~~8~~) Plan Student means a student enrolled in early childhood through post-secondary education who:

(a) Is an asylum seeker, a refugee or any other immigrant, regardless of status; and

(b) Has experienced disproportionate results in education due to current and historical practices and policies, as identified by the State Board of Education by rule.

~~(19) Transgender: A person who feels their gender identity and expression do not align with the sex they were assigned at birth or by society.~~

~~(20) Two-Spirit is means a term used within some Indigenous communities, encompassing cultural, spiritual, sexual and gender identity. The term reflects complex Indigenous understandings of gender roles, spirituality, and the long history of sexual and gender diversity in Indigenous cultures. Individual terms and roles for Two-Spirit people are specific to each nation.~~

Stat. Auth. Section ___, House Bill ___
Stat. Implemented: ___, House Bill ___

Notes: All definitions should be in alphabetical order. Definitions are useful to: (1) Limit or extend the meaning of a word, particularly if the word is used in other than its normal sense or has several meanings. (2) Translate technical terms or words of art into common language. "XXXX" is a placeholder for numbers received from the Secretary of State's office.

581-017-XXXX Establishment

(1) There is established the Immigrant Refugee Student Success Plan Grant Program to support early learning hubs, providers of early learning services, school districts, public charter schools, education service districts, Tribe(s), post-secondary institutions of education, ~~and~~ Community-Based Organizations, or a consortium of these entities who are working to design, implement, improve, expand, or otherwise revise programs and services for Plan students.

(2) The programs and services to be provided under the Grant must implement one or more of the strategies or address one or more of the objectives included in the Immigrant /Refugee Student Success Plan

(3) Subject to available funds, the Department of Education shall award Grants based on a detailed description of proposed programming or services. The programs or services may include:

a. The scale-up of an existing program or project; and/or

b. The implementation of a new program or project.

(4) The purpose of the Grant program is to provide funds to applicants that document an understanding of the unique needs of Immigrant and Refugee students, have the potential to become exemplar programs, and who create collaborative practices relating to strategies outlined in the Immigrant /Refugee Student Success Plan.

Stat. Auth. Section ___, House Bill ___
Stat. Implemented: ___, House Bill ___

Notes: It may not be necessary to establish the grant program by rule if the program is already established in statute.

581-017-XXXX Eligibility

(1) The Department will establish a process for eligible entities to apply for an Immigrant /Refugee Success Plan Grant.

(2) To be eligible to receive a Grant, an applicant must:

(a) Be a Community-Based Organization, early learning hub, provider of early learning services, school district, education service district, ŧTribe, ~~or~~ post-secondary institution of education; or a consortium of these entities and

(b) Demonstrate ~~the majority of~~activities implemented ~~the students served~~ by the

Commented [FO1]: Statutory/Other Authority: ORS 338.155
Needs to reference this ORS in order to add public charter school to this list.

Commented [MP2]:
Statutory/Other Authority: ORS 338.155
For public charter school

proposed project are designed to address the unique needs of students served by the plan and their families.

(c) Demonstrates alignment between the project and the strategies of the Immigrant/Refugee Student Success Plan.

Commented [FO3]: This was added in NHPI rules - can omit if we choose but wanted you to see this.

Stat. Auth. Section ___, House Bill 3233
Stat. Implemented: ___, House Bill 3233

Notes: In determining eligibility first review the statute that established the grant program. Eligibility must be consistent with the statute. Also review any documents that express the intent of the particular grant. These may include the enabling legislation or legislative testimony.

581-017-XXXX Criteria

(1) The Department will award Grants to eligible entities based on the following criteria:

(a) Whether the proposed project successfully implements the strategies provided in the Immigrant Refugee Student Success Plan;

(b) Whether the applicant authentically and consistently engages Community Voice in the proposed project; and

(c) Whether the applicant demonstrates equitable distribution of Grant funds and resources in Partnership.

(2) The Department may give priority to applications that:

(a) Are led by Culturally Specific or Community-Based Organizations that represent Immigrant Refugee communities;

(b) Demonstrate authentic and on-going Partnerships with Community-Based Organizations, Culturally Specific Organizations, school districts, public charter school, early learning hubs, educational service districts, providers of early learning services, post-secondary institutions of education, ~~or~~ Ttribe(s), or a consortium of the entities that serve ~~immigrant and refugee~~ Plan students and communities;

Commented [FO4]: **Statutory/Other Authority:** ORS 338.155
Needs to reference this ORS in order to add public charter school to this list.

(c) Will help ensure geographic diversity of the Grant program by including rural communities or other underserved communities with large Immigrant Refugee student populations; ~~or~~

(d) Address a strategy or an objective of the Immigrant Refugee Success Plan that requires additional support, as determined by the Department.;

(e) Address strategies or objectives that are common across the African American/Black Student Success Plan, the American Indian/Alaska Native Student Success Plan, the Latino/a/x and Indigenous Student Success Plan ~~and/or the American Indian/Alaska Native Student Success Plan,~~ the LGBTQ2SIA+ Student S~~u~~uccess Plan, and/or t~~T~~he Native Hawaiian/Pacific Islander Student Success Plan and communities~~.~~;

(f) Address the intersectionality of the student populations served by the Immigrant/Refugee Student Success plan with the other student success plans within the Department; or

(g) Provide a plan for the authentic and meaningful voice and choice of Plan youth are engaged in program development, evaluation and implementation.

Stat. Auth. Section ___, House Bill ___
Stat. Implemented: ___, House Bill ___

Note: In determining the criteria for the grant, have you considered the Equity Lens adopted by the OEIB.

581-017-XXXX Funding

(1) Applicants must submit a detailed budget that explains how Grant funds will be used.
(2) Administrative costs, which include indirect costs, will be allowed as a percentage of the Grant funds disbursed as follows:
(a) Up to five percent for school districts, education service districts, early learning hubs, or post-secondary institutions of education; ~~or~~
(b) Up to fifteen percent for ~~tribal governments,~~ community-based organizations, or providers of early learning services~~.~~;
(c) For Trib~~al governmente~~(s, up to fifteen percent or the Trib~~al governmente~~'s federally recognized indirect rate, as provided in the grant agreement; ~~or~~
(d) Administrative costs for partnerships or consortiums will be allowed based on the lead entity's organization type.
(3) Applicants may use Grant funds only for authorized purposes.

Stat. Auth. Section ___, House Bill 3233
Stat. Implemented: ___, House Bill 3233

Notes: In determining funding, you should review the amount available for the grant, how many recipients will be awarded the funds and determine whether there should be a minimum or maximum grant amount. You should also consider whether the grant amount should be done based on the number of students in a district. ADMw is one method of "counting" students but there are others.

Commented [FO5]: Suggest putting these alphabetically, so we have a reason for the order

Commented [MO6]: Should we ask April about this? I seem to recall Renee saying that some Tribes have more than a 15% indirect rate...?

Commented [FO7]: This is from the NHPI rules

581-017-XXXX Reporting

1. Grant recipients must report project or program outcomes in the manner and form required by the Department of Education.

Stat. Auth. Section ___, House Bill ___
Stat. Implemented: ___, House Bill ___

OREGON
DEPARTMENT OF
EDUCATION

Immigrant / Refugee Student Success Plan Temporary Rules

State Board of Education
June 2024

501

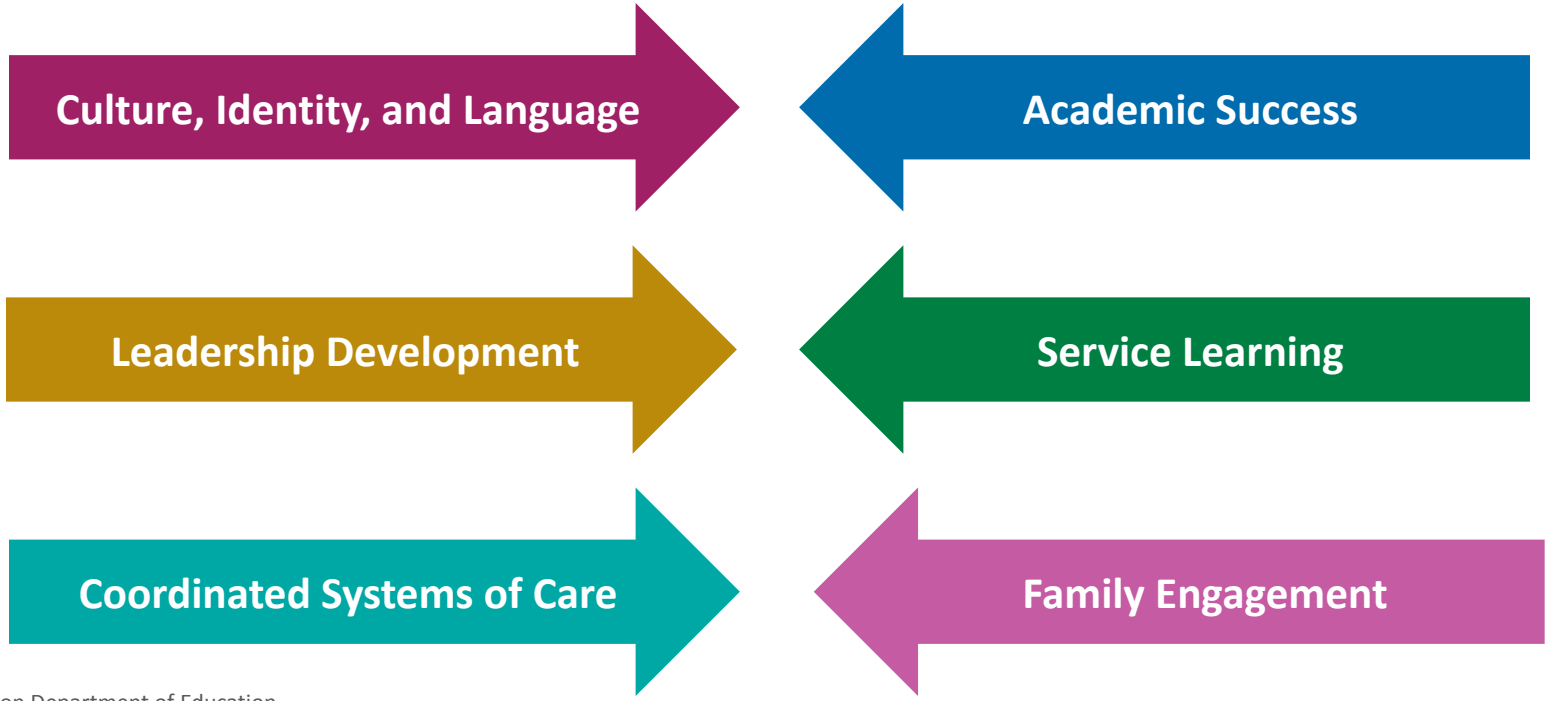
STUDENT SUCCESS PLANS



502

Cross-Student Success Plan Framework

High level overview of structures, purpose and outcomes

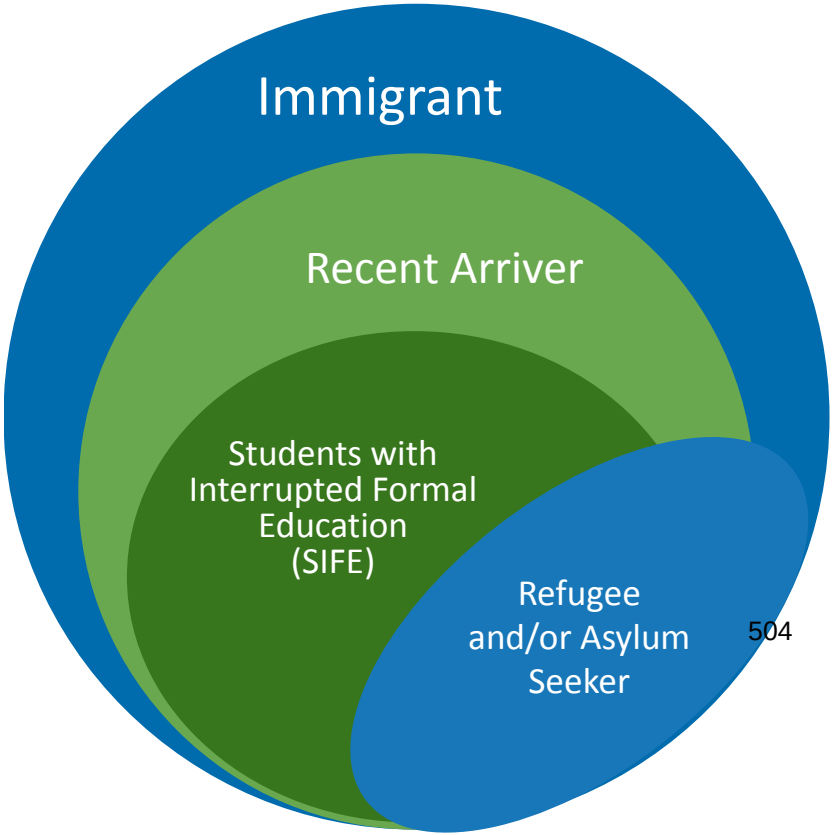


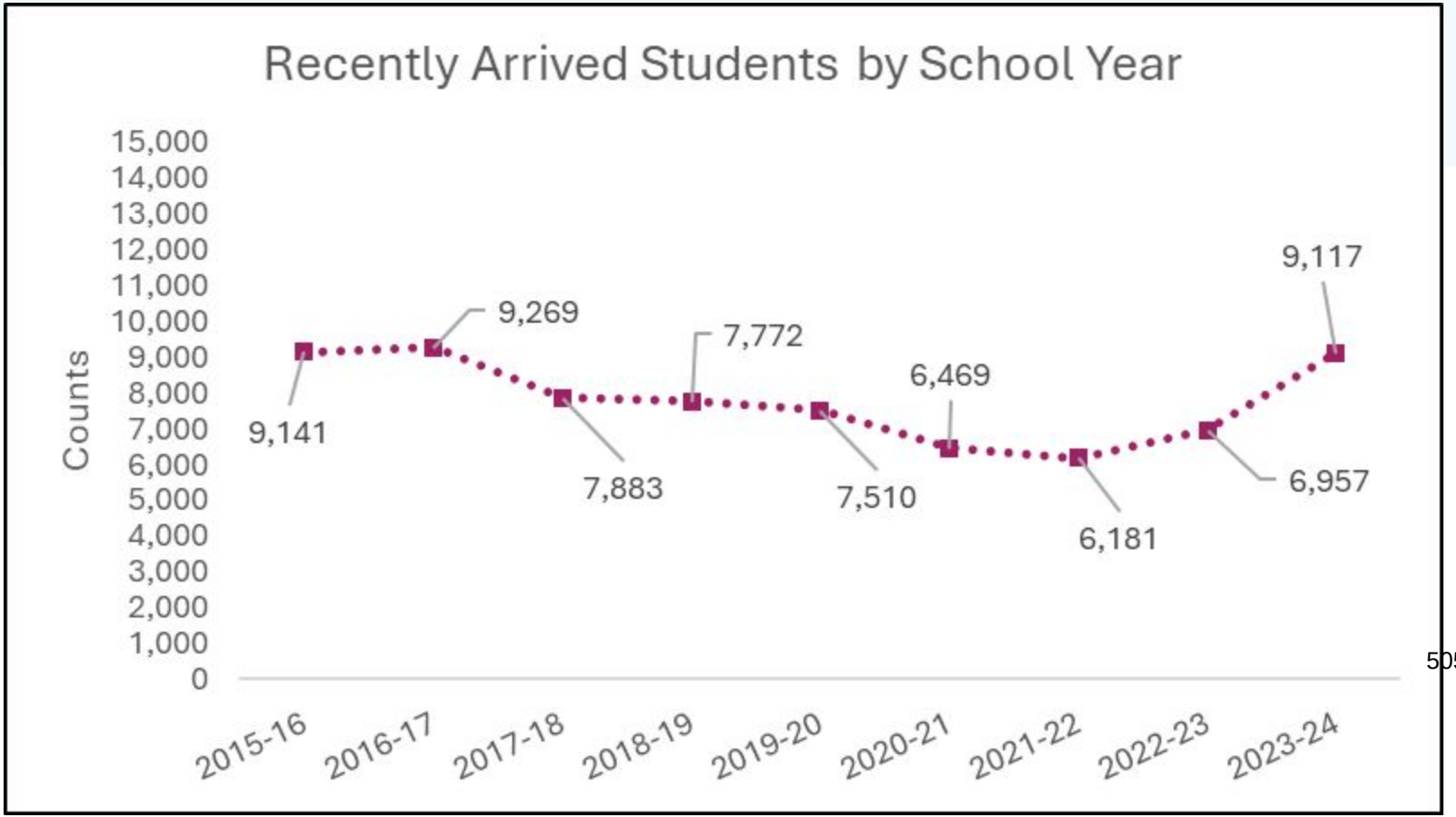
503

Who will this plan serve?

Immigrant: A categorical term that encompasses all the identities we are intending to serve with this Plan.

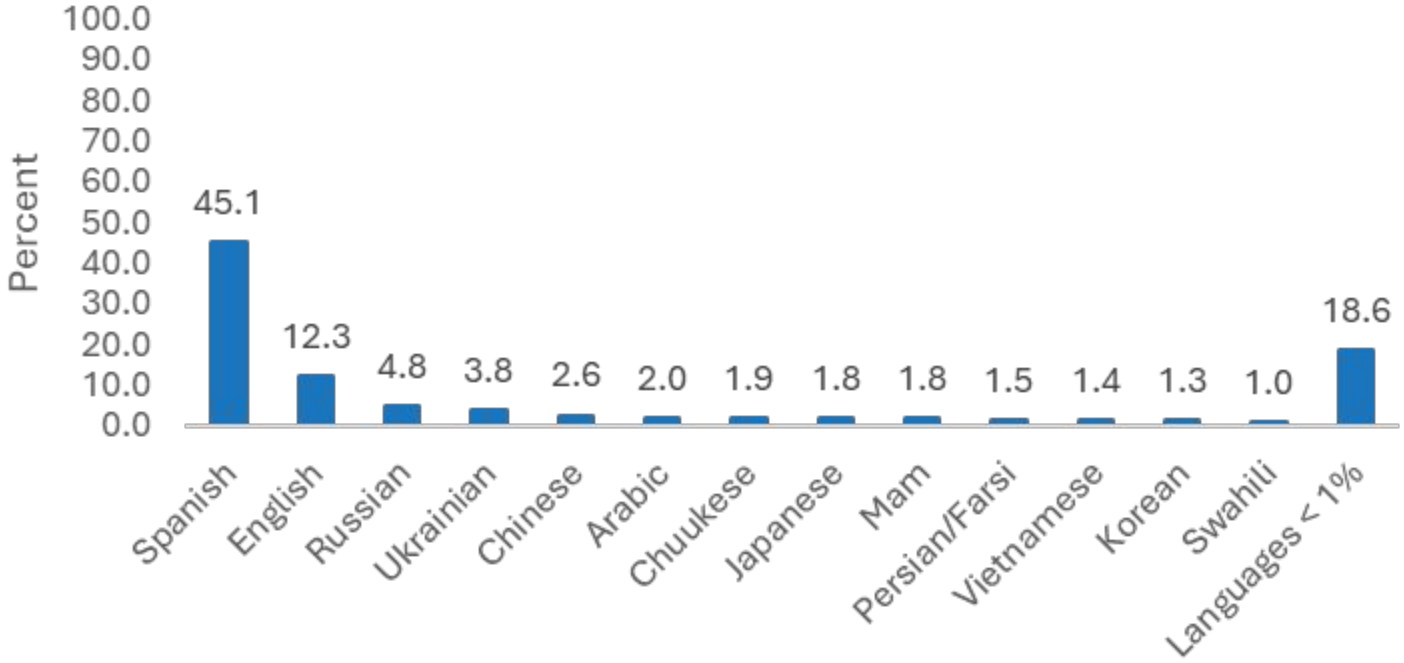
- **Recent Arriver:** This term provides more specificity and detail predominantly related to the number of years since the student arrived.
- **Students with Interrupted Formal Education (SIFE):** This term provides more specificity and detail predominantly related to the number of years since the student arrived and their present level of academic performance.
- **Refugee/Asylum Seeker:** A term that refers to students actively seeking protection and/or permanent relocation from **outside**/**inside** of the U.S. including but not limited to recent arrivers who have experienced interrupted formal education.



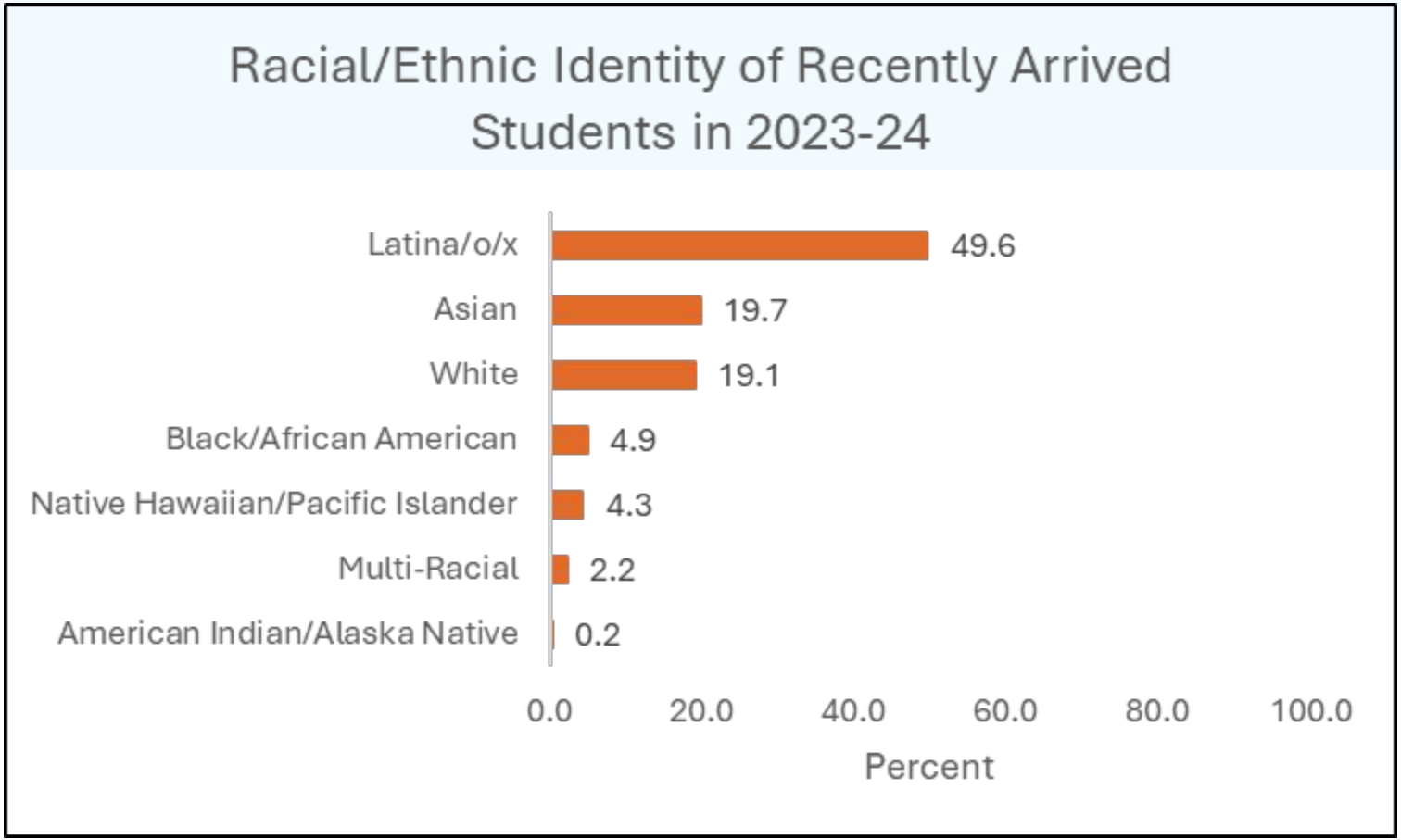


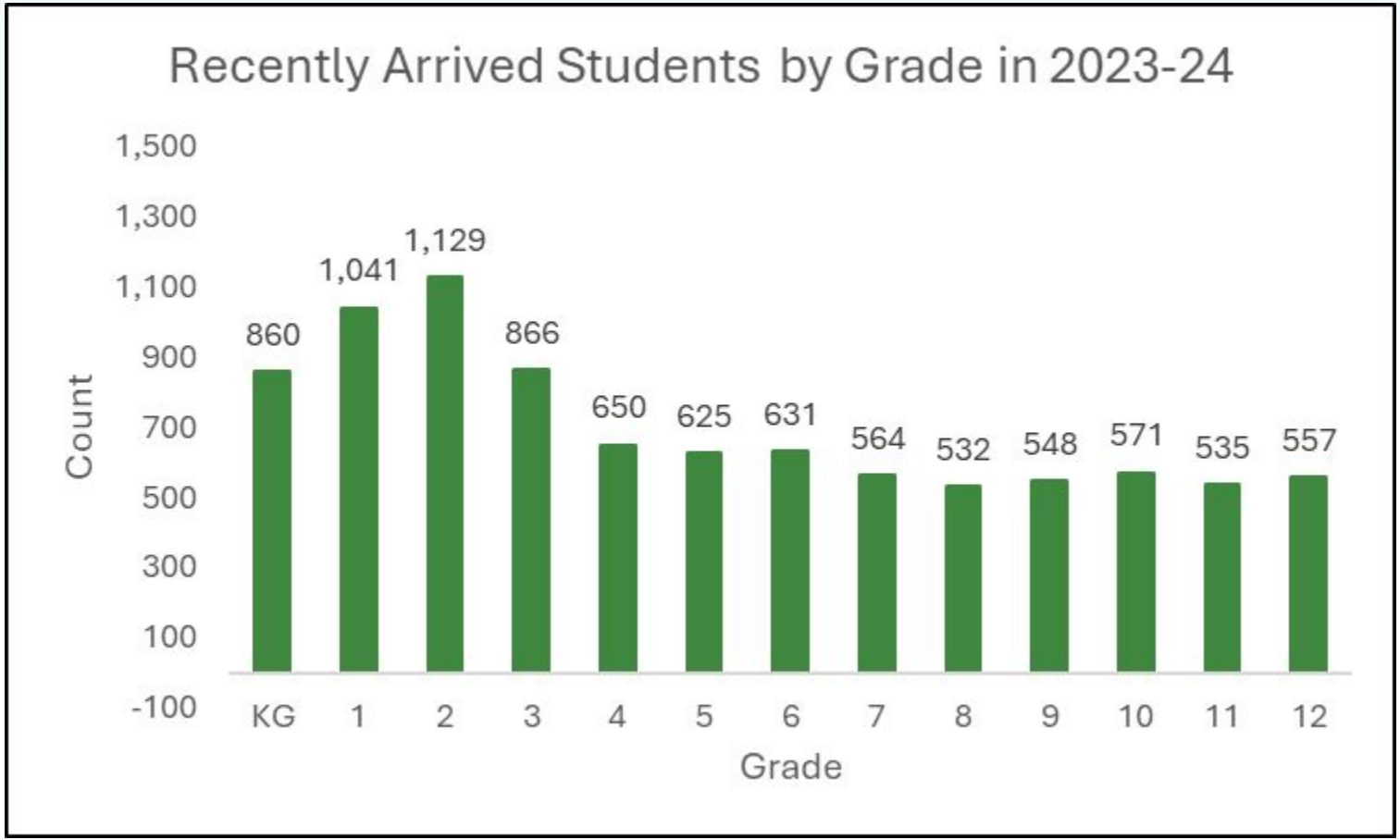
Oregon Department of Education

Languages Spoken by Recently Arrived Students in 2023-24



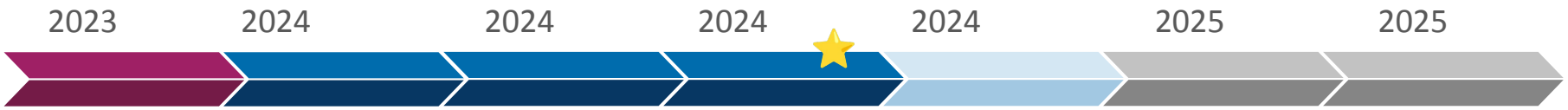
Racial/Ethnic Identity of Recently Arrived Students in 2023-24




Recently Arrived Students by Grade in 2023-24
Count
1,500
1,300
1,100
900
700
500
300
100
-100
860
1,041
1,129
866
650
625
631
564
532
548
571
535
557
KG
1
2
3
4
5
6
7
8
9
10
11
12
Grade

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Anchors and timeline



FTE

2 FTE for Ed Spec and 1 FTE for PA 3 provided in 2023 omnibus bill.

SB 1532

In early 2024, SB 1532 passed during the 2024 short session. ODE awarded Grant in Aid (GIA).

Temp Rule Engagement

We are currently engaging SSP advisory groups and in June, ODE went before the RAC with draft temporary rules.

Temp Rule Adoption

ODE is here before SBE in June for temp rule adoption.

Taskforce & Engagement

ODE will convene a task force and gather community voice from across the state to develop the interim SSP.

Grants

ODE intends to solicit awardees for aligned to interim SSP to expend $2mil in GIA provided for the 24-25 SY.

25-27 Biennium

Advisory group establishment, refining of interim plan, permanent rule adoption, and establishing of full grant program with $4 mil per biennium.

Immigrant/Refugee SSP Grant Program
Draft Temporary Rule Community Feedback

Immigrant/Refugee **students and families** have unique needs that make **entering or accessing education challenging** including:

- **Financial barriers** such as housing instability or earning income for older students.
- **Safety and confidentiality** concerns around immigration and asylum status.
- Less support for older newcomer and ELL students who are at or nearing 18 or have **recently graduated**.
- Lack of **language supports** in academic programs, specifically naming CTE.
- Supporting students who have been **pushed out** or are currently disengaged in education.
- Supporting **recent arriver students** with culturally and linguistically responsive matriculation into Oregon's K-12 public school system.
- Resources for **literacy intervention** at the secondary level that align to students' needs without decreasing rigor.

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Stay connected to the Immigrant/Refugee Student Success Program

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Carol Matsuzaki
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Mariana Praschnik-Enriquez
Director, Office of Equity, Diversity, and Inclusion
mariana.praschnik@ode.oregon.gov



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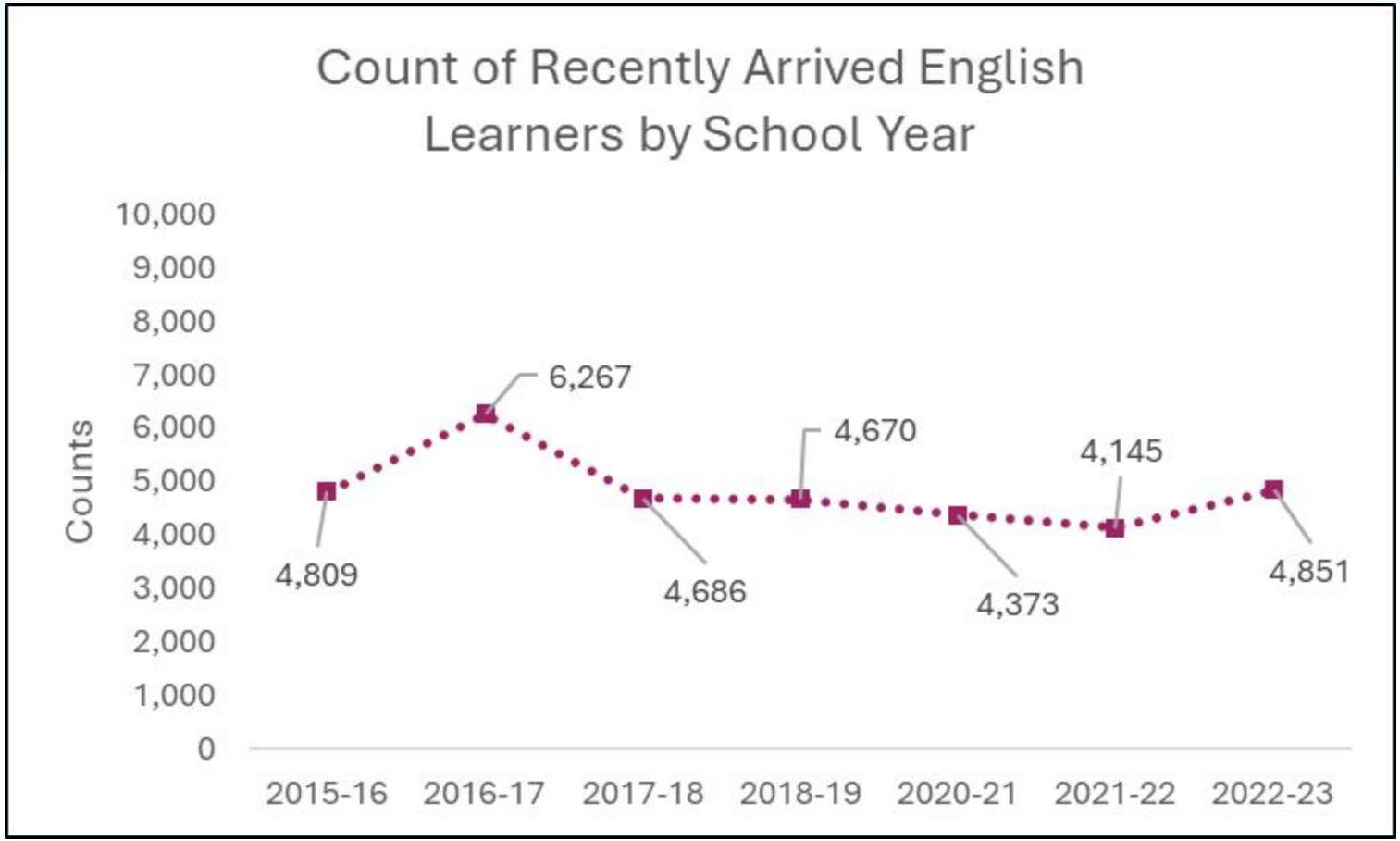
Subscribe to the Immigrant/Refugee Student Success Listserv to hear about upcoming opportunities!

OREGON
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Questions?

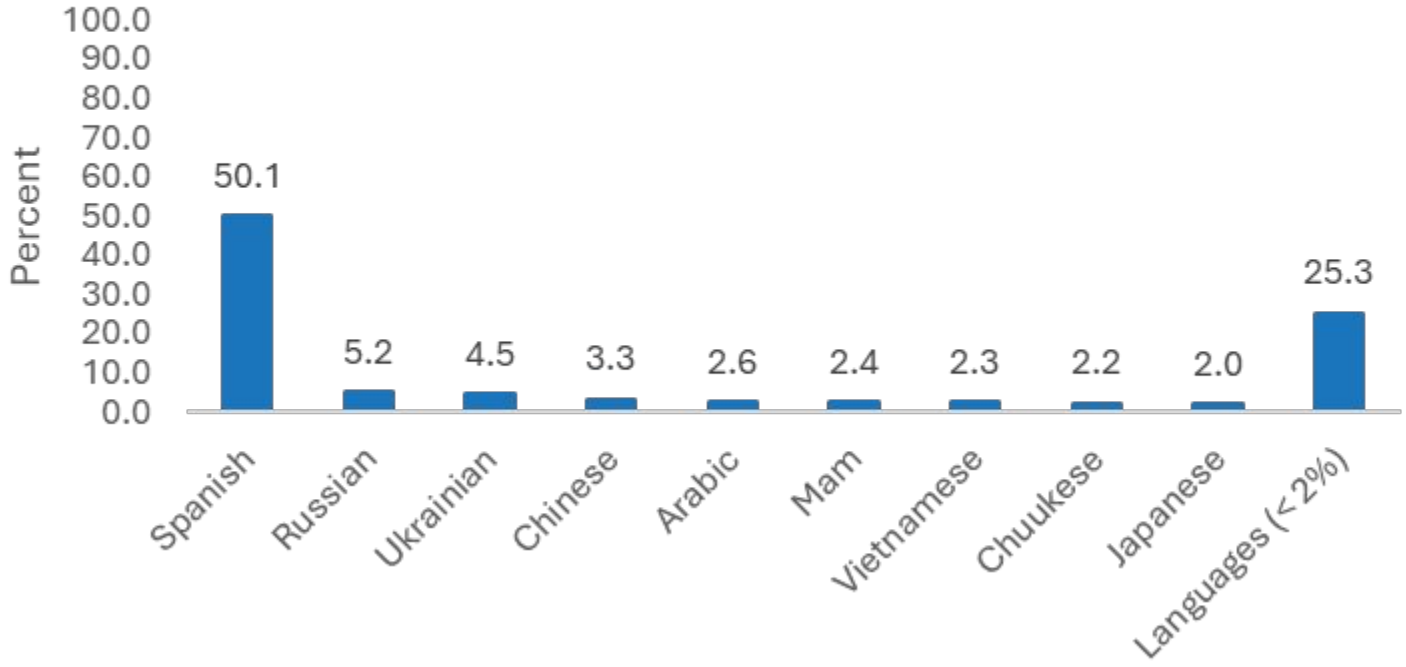
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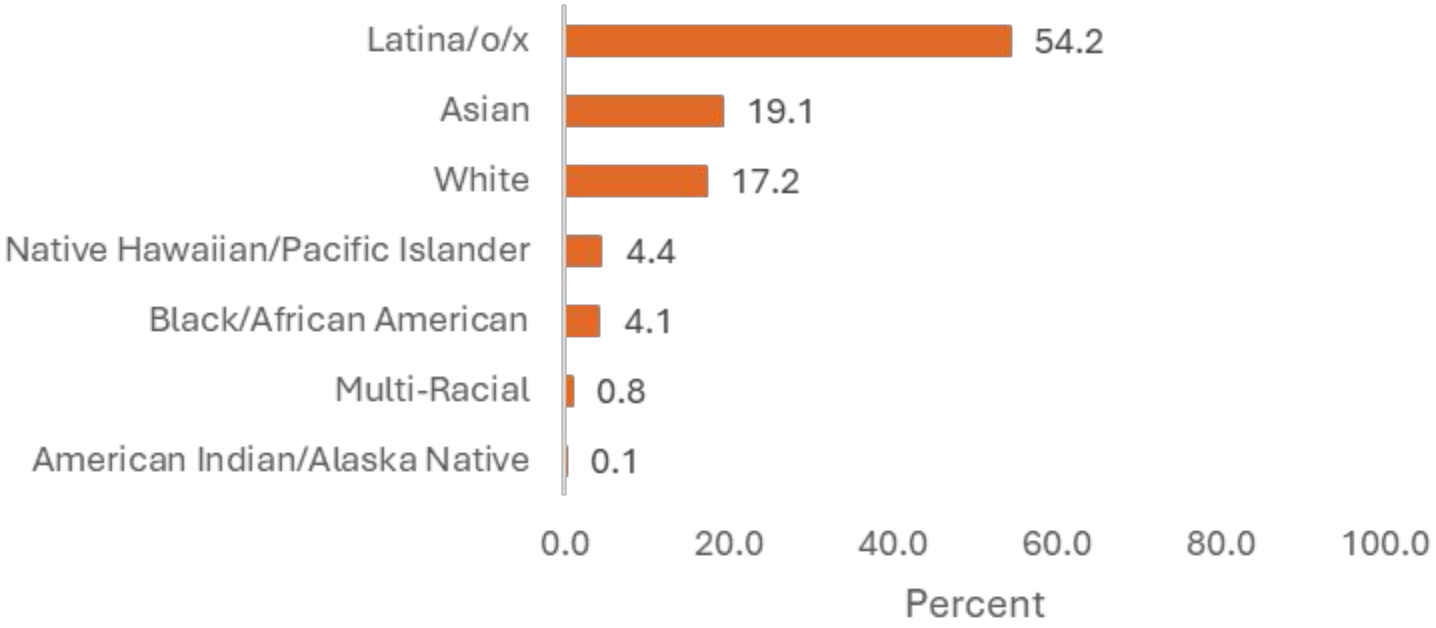


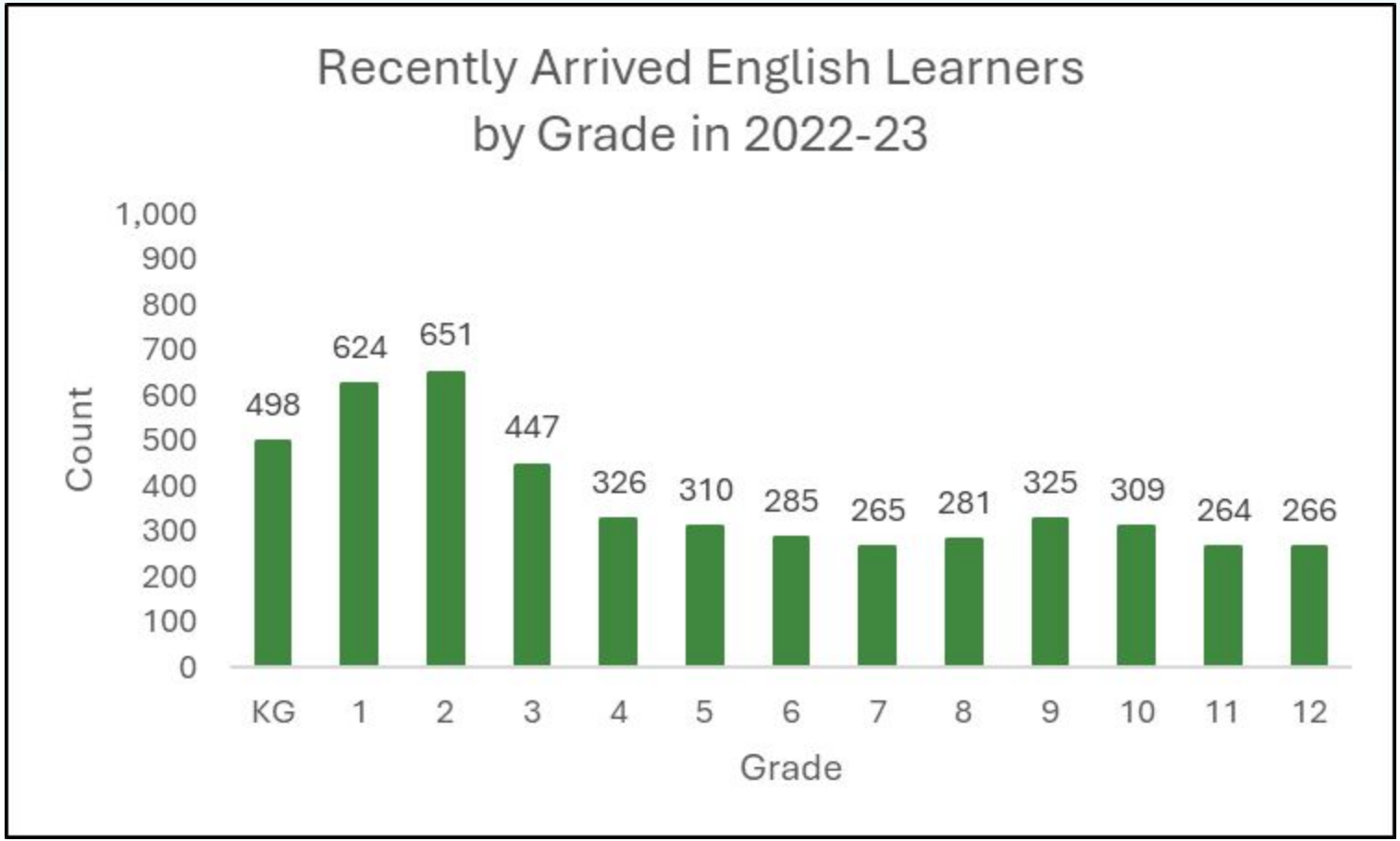
Oregon Department of Education

Languages Spoken by Recently Arrived English Learners in 2022-23



Racial/Ethnic Identity of Recently Arrived English Learners in 2022-23




Recently Arrived English Learners
by Grade in 2022-23
Count
1,000
900
800
700
600
500
400
300
200
100
0
498
624
651
447
326
310
285
265
281
325
309
264
266
KG
1
2
3
4
5
6
7
8
9
10
11
12
Grade

Pilot Grant to Improve Educational Outcomes of Foster Care Student

581-017-XXXX

Definitions

The following definitions apply to OAR 581-017-XXXX to 581-017-XXXX:

(1) "Foster Care Student Success Pilot Grant" means the grant established by Oregon Laws 2024, chapter 33, sections 1 to 6 pursuant to House Bill 4084 (2024).

(2) "Education advocate" means a person who:
   a. Provides advocacy, guidance, and support for a foster child student for educational purposes during the course of this grant; and
   b. May or may not be the same person as the designated foster care point of contact.

(3) "Foster child student" means a student enrolled in middle school or high school who is:
   a. In the care and custody of the Department of Human Services pursuant to the provisions of ORS chapter 418 or 419B and is placed in substitute care;
   b. A ward, as defined in ORS 419A.004, who remains in the legal custody of the ward's parent or who is in the care and custody of the Department of Human Services but who is residing with the ward's parent.

Selection

The Department of Education shall select three public middle or high schools in accordance with Oregon Laws 2024, chapter 33, sections 1 to 6 pursuant to House Bill 4084 (2024).

Funding

1) Each biennium, the Department of Education will determine the funds available for the Foster Care Student Success Pilot Grant and the distribution of grant funding to eligible grant recipients.
2) Funds received by a grant recipient under this section must be separately accounted for and may be used only for the purposes described in the grant agreement.
3) A grant recipient may use up to five percent for administrative costs, including indirect costs, as determined by the grant agreement.

Reporting

1) Grant recipients must report on the grant in the manner and form required by the Department of Education.
2) The Department may require grant recipients to submit a final report prior to receiving their final request for funds.

Stat. Auth. Section ___, House Bill 4084 (2024)

Oregon State Board of Education
June 12, 2024
AGENDA ITEM: 7.D.

SUBJECT: OAR 581-017-XXXX Pilot Grant to Improve Educational Outcomes of Foster Care Student **STAFF NAME & OFFICE**: Marlie Magill and Vanessa Martinez; Office of Teaching, Learning, and Assessment With the passage of House Bill 4084, temporary rules are needed to implement a pilot grant program to meet the educational needs of students in foster care. ☒ New Rule ☐ Amend Existing Rule ☐ Repeal Rule	☐ **First Reading** ☐ **Presentation** ☐ **No Presentation** ☒ **Action** ☒ **Temp Rule** ☒ **Presentation** ☐ **No Presentation**

BACKGROUND

HB 4084, which was passed in March 2024, requires the department to use moneys in the Statewide Education Initiatives Account to provide funding for a pilot program that is aimed at meeting the educational needs of students in foster care and improving educational outcomes. The bill directs ODE to select three schools (middle or high schools) to participate in the pilot. These schools will be required to ensure that students in foster care are provided access to an educational advocate who will provide guidance and support for educational purposes. The Department of Education shall also submit reports concerning the pilot program to the interim committees of the Legislative Assembly related to education in September of 2025 and 2027.

The pilot program shall be considered a statewide education plan, consistent with what is outlined in ORS 327.254 (in effect since 2021). There are currently no other funding mechanisms in rule for foster care youth; there are state and federal laws which govern and articulate the rights of students in foster care, but the program itself does not receive dedicated funding, aside from transportation. The funding for transportation is facilitated through the Oregon Department of Human Services (ODHS) as part of the Social Security Act Title IV-E funding for specially accommodated routes. Additionally, there are currently no grant rules for foster care. In terms of existing rules related to the education of students in foster care, ORS 339.133 (in effect since 2015) defines foster care youth and determines residency of students for school purposes.

The draft rules were written by an internal cross-agency team within ODE and external partners including the ODE Foster Care Team, ODE Grant Consolidation Team, and ODHS's Child Welfare Education Program Coordinator. The ODHS Coordinator assisted with the Definitions rule, ensuring that the pilot program's definition of "foster child student" is in alignment with definitions used by ODHS and ODE. The Office of Indian Education provided feedback on the bill

analysis during session, indicating there would be no tribal impact from this bill and pilot program directly. The Foster Care Team intends to remain in communication with the Office of Indian Education should any new developments warrant potential inclusion of tribal child welfare communities who experience high mobility.

The timeline established by HB 4084 requires that participating districts receive grant funds by **July 1, 2024**, with the grant sunsetting **June 30, 2025**. This constitutes an immediate need for temporary rules to be passed and results in a timeline that limits opportunity for community engagement. Further opportunities for community engagement will be identified through the permanent rulemaking process. Although the scope of the program may be limited, ODE will reflect on all available results while writing the reports to identify programmatic needs and guide future actions that support students in foster care.

SUMMARY OF PREVIOUS BOARD ACTION

This issue has not yet been before the board.

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

Students in foster care disproportionately experience high chronic absenteeism, exclusionary discipline, and special education designations compared to their peers. Despite these areas of need, this population of students has not previously had any fiscal assistance specifically targeted at improving their educational experiences or outcomes. This program brings additional awareness to the unique needs of this population and may highlight current gaps in district and community services. Ideally, this pilot program will produce learnings that inform longer-term efforts to address educational disparities experienced by students in foster care.

The proposed rules provide clearer definitions for key terms such as "foster child student" and "education advocate," which are critical to understanding who may participate in the pilot program and who may facilitate it. The rules also provide insight on the selection process, appropriate use of funds, and expectations for reporting. Within the space of required reporting, the selected districts, aided by this guidance, will have discretion to implement a program that reflects the unique needs of their students in child welfare foster care.

Because the pilot program is for just two years and students in foster care may need support through graduation, the proposed rules were written to allow districts greater flexibility in their program implementation. As the experts in their communities, they will be able to determine what program design will best serve their specific community of students. The rules provide the districts with additional specificity on who the funds will serve and provide autonomy on how those funds are implemented. Through the report-writing process, ODE plans to pursue opportunities for engagement and youth voice, to identify how future supports can build upon this program and expand services to improve the educational experiences for students experiencing foster care.

Because the rules allow for autonomy and discretion in the districts' implementation of the pilot program, the participating schools can target needs related to graduation and school completion; they could make these decisions based on their own direct work with students and assessment of student needs. This is important because data suppression policies and confidentiality measures might significantly limit what academic outcome data can be analyzed and/or shared in the legislative reports. Although this might make it hard to determine if this program will advance Oregon's 40/40/20 goal, individual students who participate may still demonstrate improved outcomes as a result of this direct, school-level support.

While this pilot program does have the potential for positive impact, it is also critical to anticipate potential barriers to its success. Federal mandates regarding education rights for foster care students are vague in interpretation and application. Consequently, there may be differing opinions about whether this pilot program aligns with federal requirements related to privacy and confidentiality, equal educational opportunities, and special support programs. ODE's Foster Care Team will continue to train and advise districts on relevant state and federal guidance, which may help mitigate some of the impacts.

Additionally, students in foster care have only recently been identified as a student group for whom data and outcomes should be independently collected and evaluated. As a result, funding priorities have not historically included this population. These limitations on both resources and data have affected ODE's ability to develop historical context to pull from when drawing conclusions about areas of need. It has also limited the means by which these needs, when identified, may be addressed.

The amount of money allotted for this pilot program may also create limitations, as it is a relatively small grant. Consequently, identified areas of need for students in foster care may extend beyond what can be addressed and supported by the current allocation of funds. The proposed rules will support selected districts in effective implementation of the pilot program, which may act as an important step in larger-scale efforts to address the educational needs of students in foster care.

Non-participating school districts may have questions about the selection process and why they did not have the opportunity to participate, as this pilot is not a competitive formula grant. Because an ideal result of this pilot program is an overall emphasis on foster care student support, ODE plans to communicate long-term student success goals from the pilot to all qdistricts, and to stress that diverse representation and stakeholder voice will be a vital contribution to future efforts.

It is important to consider the potential for barriers within the Foster Care Program as a whole. The Foster Care Team at ODE is robust, despite being relatively new in its conception. ODE's communication and partnership with district Foster Care Points of Contact/Liaisons is a critical aspect of preserving the educational rights and opportunities of students in foster care. Through monthly Office Hours, Federal Programs Monitoring, and direct case-management, ODE program staff work hard to ensure districts are aware of foster care student rights under the Every Student Succeeds Act (ESSA), and that their policies and protocols reflect that. Because these technical assistance and support efforts are still underway, there is potential for programmatic barriers if the roles and operations associated with the pilot program conflict with those of the existing Foster Care Program.

For example, the district Foster Care Liaison is the appropriate district point of contact to receive foster care identification notices and forms. If an additional foster care education advocate is brought in as part of the pilot program and their role is confused or conflated with that of the liaison, critical information may not end up with the correct parties. The ODE Foster Care Team will work with Foster Care Points of Contact in participating schools to support any training and communication that may help address, or ideally prevent this kind of confusion.

EQUITY IMPACT ANALYSIS

HB 4084 focuses on providing educational support and advocacy for students in foster care. Foster care youth are a historically underserved population. Additionally, students in foster care are also statistically more likely to receive special education services, experience housing instability, receive exclusionary discipline, experience chronic absenteeism, and to be members of the LGBTQ2SIA+ community. Thus, students who will be participating in this pilot program are more likely to represent multiple identities within underserved communities. While implementing the grant and developing permanent rules, community engagement will inform ODE's efforts to address the potential impact to these groups.

FISCAL ANALYSIS

A total of $450,000 may be distributed for the implementation of the grant. The rules authorize ODE to distribute these funds to the three selected districts. The Funding section of the proposed rules specifically will offer guidance on the appropriate use of funds and fund distribution.

Oregon State Board of Education
June 12, 2024
AGENDA ITEM: 7.D.

EFFECT OF A "YES" OR "NO" VOTE

A yes vote will provide a set of rules that will guide the implementation of the grant program outlined in House Bill 4084. This pilot program is intended to provide support for foster care students to improve their educational outcomes.

Should the board vote no, the absence of rules may prevent ODE from implementing the grant program and fulfilling the bill requirements.

STAFF RECOMMENDATION

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

ATTACHMENTS

- DRAFT RULES: Pilot Grant to Improve Educational Outcomes of Foster Care Student - 581-017-XXXX
- ORS 327.254
- ORS 339.133
- Foster Care Race Statistics | The Annie E. Casey Foundation - The Annie E. Casey Foundation (aecf.org)

Oregon State Board of Education
June 13, 2024
AGENDA ITEM: 8.A.

SUBJECT: Oregon State Seal of Biliteracy informational update **STAFF NAME & OFFICE**: Ben Wolcott, Office of Research, Assessment, Data, Accountability, and Reporting This presentation will update the State Board of Education on the 2023-24 Oregon State Seal of Biliteracy award season. There is no requested decision point or action by the Board.	☒ **Informational Presentation** ☐ **Written Report**

BACKGROUND

The State of Oregon has awarded a State Seal of Biliteracy for 10 years. This informational presentation will summarize Seal of Biliteracy awards and actions in 2023-24.

SUMMARY OF PREVIOUS BOARD ACTION

This informational presentation is not following up on previous Board action.

POLICY ISSUE OR CONCERNS

This informational presentation is not a request for any Board action or decision.

EQUITY IMPACT ANALYSIS

This informational presentation contains updates for an ongoing program. Because there is no requested action or decision, no equity impact analysis was conducted.

FISCAL ANALYSIS

This informational presentation contains updates for an ongoing program. Because there is no requested action or decision, no fiscal analysis was conducted.

ATTACHMENTS

Presentation slides will cover the following topics:

- Seal of Biliteracy overview
- Eligibility to earn the Seal (including what it means to say a student is “Proficient”)
- Recent changes to the program
- 2023-24 award data (high points only)
- The Seal in 2024-25
- Space for questions or comments

Oregon State Board of Education
June 13, 2024
AGENDA ITEM: 8.B.

SUBJECT: OAR 581-022-2130 **Community Informed Information Gathering Process at Kindergarten** **STAFF NAME & OFFICE**: Sody Fearn, Corine Tyler, Andrea Lockard The Early Learning Transition Check-In (ELTC) completed its second pilot in 2023, the Family Conversation. Following these conversations, ODE and the Department of Early Learning and Care, collaborated with Oregon's Kitchen Table and held feedback sessions with kinder educators, families, culturally specific groups, and early learning partners. Our team would like to provide an update to the State Board about the ELTC process, share information about what we are learning through community engagement, our plans for future implementation based on these engagements and the data analysis process that is currently underway using a mixed method research approach.	☒ **Informational Presentation** ☐ **Written Report**

BACKGROUND

1. History:
    a. What prompted this update to the board?

    The process to redesign Oregon's Kindergarten Assessment is currently underway. The first component, the Family Conversation, was piloted first in Fall 2022 with nine schools and again in Fall 2023 with over 30 schools across Oregon. On February 16, 2023, Oregon's State Board of Education adopted the amended rule OAR 581-022-2130, Community Informed Information Gathering Process at Kindergarten. The amended rule fully supports the kindergarten assessment redesign process called the Early Learning Transition Check In: A Collaborative Engagement with Community. Our team would like to provide an update to the State Board about the ELTC process, share information about what we learned through community engagement, some themes that emerged, and our plans for future implementation based on these engagements.
2. Purpose
    a. What function does this policy or update hold?
        i. How long has this policy in place?

    Adopted February 16, 2023, OAR 581-022-2130, Community Informed Information Gathering Process at Kindergarten establishes that the Department of Education shall implement a community-informed process at the kindergarten level as part of the statewide assessment system implemented pursuant to ORS 329.485. The process shall allow for information collection that will inform state-level decisions about Oregon's early education and child care programs and policies to improve quality and access to programs and promote relationship building among educators, children, and families.

3. Does the board have any areas of discretion on this policy and/or update?
    The board established the OAR that defines the Community Informed Information Gathering Process at Kindergarten and has full authority in establishing that rule.

4. Stakeholder voice/input (individual and collective i.e., groups)
    a. Who was involved in bringing this to the Board?

b. What did engagement in this process entail?
c. Who may be affected by this?
d. Whose voice is missing?
e. What more information does the Board need prior to moving forward?

The Department of Education (ODE) and Department of Early Learning and Care (DELC) are collaborating with an advisory panel to redesign the assessment process. The advisory panel consists of early educators, kindergarten educators, early learning system partners, and researchers. The selection process ensured that panel members have:

- A strong equity lens
- Represent Oregon's diverse communities, including those who identify as Black, American Indian/Alaska Native, Latino/a/x and other people of color
- Represent different regions around the state
- Have experience delivering the Kindergarten Assessment and/or have used the Kindergarten Assessment data to inform classroom practices and educational systems

ODE and ELD, now known as DELC, conducted Family Listening Sessions with a small number of families to gain initial feedback in May and June of 2022. ODE and DELC wanted to know if the questions were clear and meaningful and if the process was welcoming to families. In consultation with the advisory panel, adjustments were made to the questions and process of the Fall 2022 Family Interview pilot based on feedback from these families.

The revised version was used during a Fall 2022 Pilot to try out the new tool with a larger number of kindergarten educators and families. We collaborated with Oregon's Kitchen Table to conduct engagement with pilot participants, both families and educators. With the input from the Early Learning Transition Check-In Advisory Panel, ODE and DELC used the recommendations from that report to adjust the 2023 pilot which included over 20 additional schools across different parts of the state. The family interview, now known as the Family Conversation, is the first component of this process. Other components could be included based on broader community engagement. ODE and DELC are intentionally seeking input from communities that have been historically and currently underserved by our school systems through an engagement process that has just concluded.

In addition, a ELTC Data Team was established in October 2023 that is continuing to study and build on the work on the attached Tech Report using a mixed method analyzation approach.

SUMMARY OF PREVIOUS BOARD ACTION

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

Yes, On October 19, 2023, the ELTC team provided an update to the pilot process. The board provided comments around the authentic family engagement and asked ODE staff to come back to provide an update to the project.

Oregon State Board of Education
June 13, 2024
AGENDA ITEM: 8.B.

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?
    In addition to what was learned in the family listening sessions and fall pilot above, ODE and DELC presented to the following groups to collect feedback about the direction, process and questions:
        - Oregon Early Learning Conference 2024
        - Oregon Association for Comprehensive Education 2024
        - Oregon School Board Annual Convention November 2023
        - Oregon School Board Summer Conference August 2023
        - English Learner Advisory Committee May 2023
        - AI/AN, Latino/a/X and Indigenous, AAB Student Success Advisory Committee Monthly Meetings in April 2023
        - Oregon Early Learning Conference April 2023
        - Oregon Head Start Association April 2023
        - Oregon State Board Rules Advisory Committee in September 2022 and January 2022
        - COSA conferences: Summer 2022 Conference and Annual Principals Conference 2022
        - Preschool/K12 Summit Summer 2022
        - Migrant Education Summit Fall 2022 about the family interview for the fall 2022 pilot
    b. Who are the historically underserved groups affected?
    Historically Underserved groups include:
        - children who are navigating poverty
        - children of color, including Black/African American, American Indian/Alaska Native, and Latino/a/x, Pacific Islander, and communities who experienced a disproportionate impact of the pandemic.
        - children who are emerging bilingual or multilingual
        - children whose families are in the migrant education program
        - children on an Individualized Family Service Plan (IFSP) or Individualized Education Program (IEP)
        - children who have not yet had a formalized education experience
        - children in the care of an adult other than the parent or guardian
        - children who are unhoused or are experiencing housing instability
    c. Has there been consultation or collaboration with tribes in this rule change or policy decision?

In spring 2021, a representative from the Department of Early Learning and Care, worked directly with Tribes and connected the project with families who participated in the listening sessions. The team is also engaging in regular conversations with representative members of ODE's Office of Indian Education to connect us with different school districts with Title VI officers. We are beginning the process to plan collaboration with DELC's Tribal Affairs Committee. In addition, several members of our advisory panel identify as American Indian or Alaskan Native.

d. How has the Oregon Department of Education modified or enhanced the rule change or policy decision to address the needs of historically underserved communities?
The ODE and DELC team have received multiple recommendations from community members. The input from the Spring 2022 listening sessions, migrant education educators/families, feedback from the Fall 2022/2023 pilots and SSA Advisory Committees have been most impactful to this project. The team intentionally seeks opportunities to engage and ask for input from communities that are currently and historically underserved in our school system.

2. Negative/Positive Effects
   a. What is the impact on the population most affected by this rule that the board should consider?
      The ELTC would support these goals:
      - Incorporate anti-racist practices in assessment approach
      - Elevate community voice in assessment design
      - Strengthen connections between families and educators
      - Inform early learning and care programs, practices, and policies
      - Improve efforts to meet the needs of Oregon children and families
   b. What possible opportunities, assets or access could this rule provide?
      The process honors the whole child and the assets they bring and allows for stronger relationships to be built between educators, families, and students starting at the beginning of a student's K-12 career as opposed to an assessment that may ultimately serve as a barrier that also has long-term impact on the connection between school and home. In addition, the rule change intentionally advances equity, by taking a more holistic view of children, by giving families an opportunity to share important contextual information about themselves, and by shifting away from focusing on children's "readiness."
   c. What is the impact on eliminating the opportunity or achievement gap?
      Establishing and building relationships with families will create welcoming and inclusive environments, creating communication pathways to improve student success. Learning about children's experiences prior to kindergarten and how to improve access to publicly-funded programs for families, will also help the early learning and care sector increase both the quality and reach of the services that it makes available in Oregon.
   d. Have all the potential unintended consequences been considered?
      ODE and DELC will continually develop and improve training that accompanies the family conversation protocols and scripts so that local education agencies (LEAs) and educators know how to implement with fidelity, feel confident in engaging with

families through conversation at the beginning of the school year, work with translators and guard against implicit bias.
ODE and DELC will also need to provide training to partners around how to interpret and use the information gathered (especially around community funds of knowledge) to adapt their curriculum, instruction, and assessment practices.

e. Does this rule advance the ESSA goals?
Through this approach, we believe users at the Department of Early Learning and Care and its partners will better understand all families' experiences before kindergarten, and gain insight on better ways to support families who choose other types of experiences prior to kindergarten such as home care. In addition, kindergarten educators and families will begin to develop positive relationships.

3. What are the barriers to more equitable outcomes:
   - Funding for meaningful teacher training and engagement
   - Compensation by vendor to families that provide feedback to assist in revising the tool
   - Staffing demands to support scheduling for parents and parent work schedules
   - Translations and access to interpreters
   - Traditional school calendaring
   - Conversations counting toward instructional time
   - Implicit biases in interactions and interpretations of responses with families
   - Safe and welcoming environment for families who have historically had limited access to educational settings
   - Confidentiality and misuse of information
   - Sustainable data collection system that will support cross-agency collaboration on data analysis
   - FTE dedicated to analyzing ELTC data using qualitative or mixed methods research approach
   - Streamlined way for agencies to collaborate securely using software

These barriers must be addressed if the ELTC process is to be scaled up statewide and expanded to include other sources of information that is critical to supporting students and families.

EQUITY IMPACT ANALYSIS

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

1. How are historically underserved populations impacted by this docket item?
   a. Demonstrate how the rule changes, policy, or action could produce other unintended consequences not listed in the docket.

   The Community Informed Information Gathering Process centers community and education partner voice and is implemented in accordance with anti-racist assessment practices. The first component of the new information gathering process is a family

conversation, where Kindergarten teachers sit with families and ask them important questions about their child's experiences and the conditions that create the best learning environments for them. ODE and DELC are intentionally connecting with families and students who have been historically marginalized by our education systems to ensure that the approach we are taking is respectful, accessible, and provides meaningful information for both families and educators, regardless of the child's background.

b. Refer to *Policy Issue or Concerns* and identify the historically underserved populations affected. Conduct a reflection and examination, which will and should answer 1a.

2. Examine the 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.
ODE and DELC are intentionally connecting with families and students who have been historically marginalized by our education systems to ensure that the approach we are taking is respectful, accessible, and provides meaningful information for both families and educators, regardless of the child's background.

3. Explain how the rule change, policy or action works toward improving achievement, opportunities and a sense of worthiness for underserved students?
Establishing and building relationships with families will create welcome and inclusive environments, creating communication pathways to improve student success.
Learning about children's experiences prior to kindergarten and how to improve access to publicly-funded programs for families will also help the Department of Early Learning and Care increase both the quality and reach of the services that it makes available in Oregon.

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?
The pilot of the Early Learning Transition Check In was allotted $250,000 for the 2023-24 school year in the Assessment Team's budget. A similar level of ODE funds will be leveraged to support a pilot administration of the Early Learning Transition Check In process in the fall of 2024; DELC's investment for the 2024-25 school year is not certain at this time. Substantial, additional investment will be required to develop and sustain the Family Conversation at scale in Oregon, including supporting educator time to participate in the engagement process, time spent training to conduct the family conversation, and articulating data review, reporting, and interpretive meetings in order to inform systems.

ATTACHMENTS

Attachment 1:

Early Learning Transition Check-In: Family Conversation

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State Board of Education

Sody Fearn, Andrea Lockard & Dan Farley

June 13, 2024

Outcomes

Early Learning Transition Check-In:
A Collaborative Engagement with Community

Where have we been?

- Purposes of the Early Learning Transition Check-In
- Links to other Oregon initiatives

Where are we now?

- Pilot process
- Data analysis plan

Where are we going?

Questions?

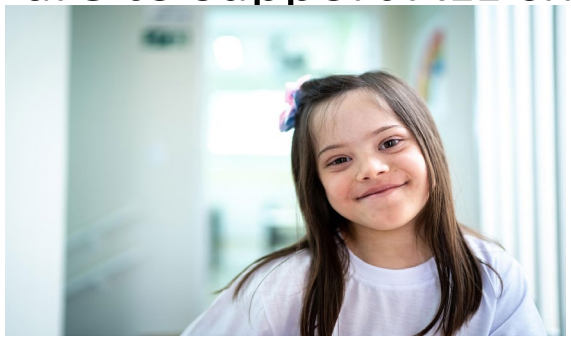


Early Learning Transition Check-In: A Collaborative Engagement with Community

Early Learning Transition Check-In:
A Collaborative Engagement with Community

- Pursuant OAR 581-022-2130
- Community engagement in **co-creation, a reimagined process**
- ODE and DELC are working in **collaboration** to respond to historical concerns about the former Kindergarten Assessment
- **Shifting focus away** from children's "readiness" for Kindergarten
- Creating a way to look at how **prepared** educators, schools, districts, communities, and **systems** are to support ALL children and families

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Family Conversation

- Each fall, Kindergarten educators will meet individually with each family entering their classes.
- The Family Conversation is a tool to support educators' conversations with families.



What it does:

- Collects information about families' early learning and care experiences
- Builds relationships among educators, parents/caregivers, and children

How it advances equity:

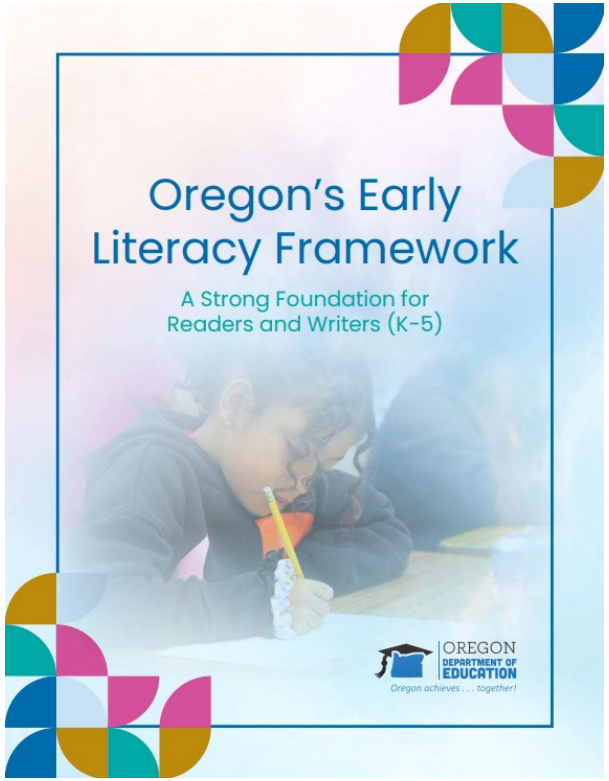
- Takes a more holistic view of children
- Provides context about families
- Shifts focus off children's "readiness"

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Links to Oregon Initiatives

Early Learning
Transition Check-In:
A Collaborative Engagement with Community

Student Success Act



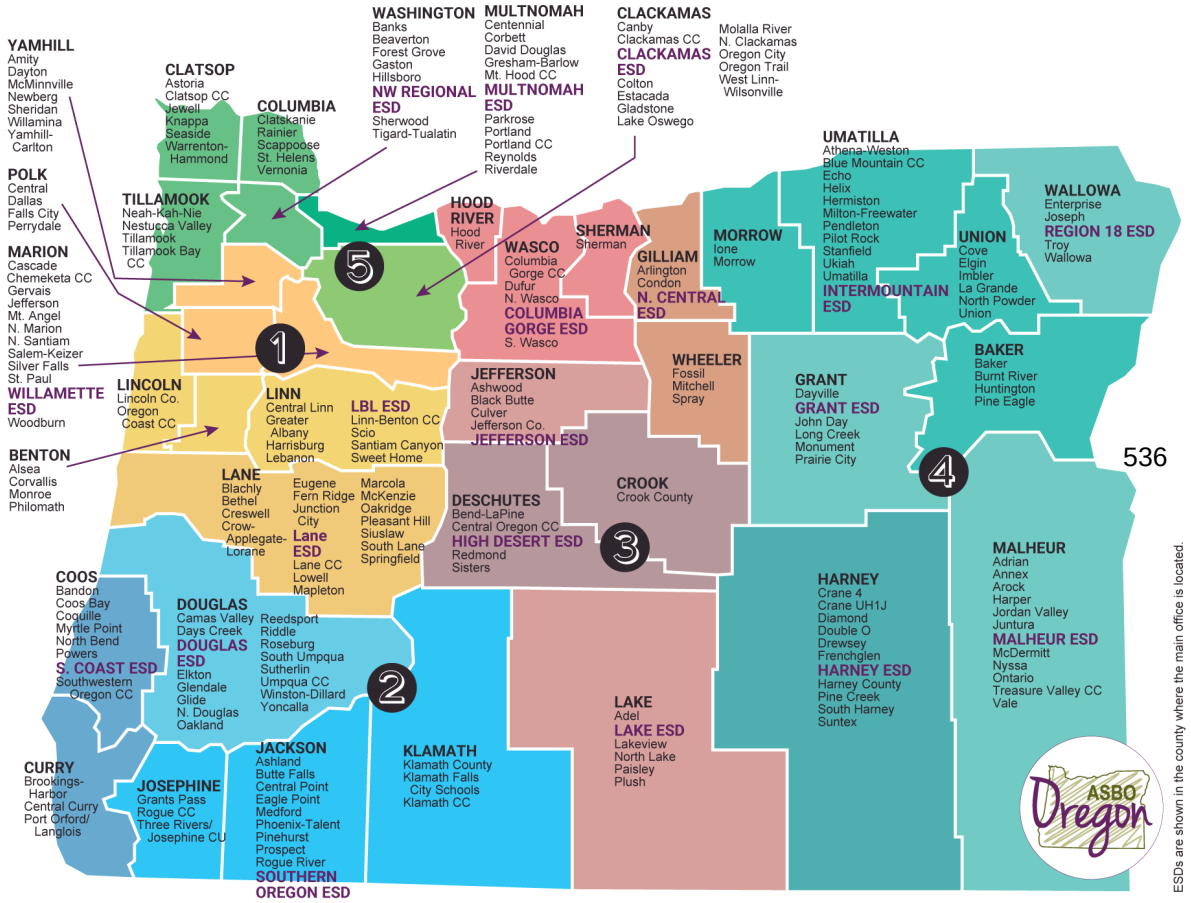


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Pilot Schools 2023

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- 12 School Districts; 34 Schools
- All Five OASBO Zones
- Over 1000 responses



Data Collection Overview

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Pre-data collection

- Training materials for teachers (manual, recordings, example script, office hours, etc.)
- Recruitment of families (communication materials sent to families using culturally responsive guidelines etc.)

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When data were collected and how

- Data collection period (August to September 25 ,2023)
- Data entry by October 6, 2023
- Teachers collect the data; take notes
- Teachers or other staff input the data into data collection form

Fall 2023 Pilot Family Conversation Questions to Inform Educators

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Questions designed to help educators **connect with and learn about the children and families** entering their class:

- What are your hopes and dreams for your child?
- What brings your child joy?
- What else would you like for me to know and understand about your child or your family?
- What questions do you have for me?

DRAFT

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Family Conversation Questions to inform Oregon

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Questions designed **to inform DELC and ODE about families' experiences** prior to starting Kindergarten:

- What kinds of child care did your family have for your child?
- What experiences, programs or services did your child receive or participate in to help them learn and grow?
- Of the experiences, programs and/or services you just mentioned, which one would you say was the most helpful to your child and your family?
- Which experiences, programs and/or services do you wish your child had received?

DRAFT

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2023 Data Analysis

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Mixed methods: combining numerical data with family voice data to provide a fuller story of children's and families' experiences.

Analyzing the close-ended questions:

- The number of families that accessed certain early learning supports, services, and systems
- Which families accessed these supports, services, and systems
- What supports, services, and systems were not available or accessible to which families

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Analyzing the open-ended questions:

- How early learning supports, services, and systems have impacted families and children
- The personal, familial, and community strengths of entering kindergarteners

Preliminary Findings: Close-Ended

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Child Care Use Prior to Kindergarten

	N	% of total
Child was cared for in a center or school	552	54
Child was cared for in someone else's home	219	22
Child was cared for in their own home	397	39
Child was only cared for by parent or legal guardian	564	56
Other	172	17
None of the above	*	*

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Future steps: examine responses to other close-ended questions, disaggregate responses by key characteristics (e.g., race / ethnicity)

Preliminary Findings: Open-Ended

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Early Learning Supports and Services

Example Codes

Early childhood education
Individualized services
Attributes of services
Negative experiences
Barriers

"Soccer has helped her be independent and challenged her at first"

Personal, Familial, and Community Strengths

Example Codes

Social connections
Emotion regulation
Culture and identity
Family connections

"She is biracial and her languages and culture are very important to her and family."

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Future steps: search for themes across codes, examine how codes interact with one another and speak to underlying processes, examine variation in codes by key characteristics (e.g., race / ethnicity)

Early Learning Transition Check-In

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Families' responses will be used…

- **By educators** – to get to know them better and to inform how you work with the children and families in their class
- **By DELC, its Hubs and ODE** – to better understand families' experiences before kindergarten and to inform how the state makes changes to state-funded programs

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By conducting Family Conversation, we ultimately hope to…

- Improve children and families' experiences during kindergarten
- Improve the future of children and families' experiences in care and education before kindergarten

Next Steps

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Engagement with community partners, educators and families

Analyze and Report

Support ELTC for fall 2024; Plan for Future Implementation

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Needs for Statewide Implementation

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- Statewide Data Collection Tool
- Finalized reporting architecture
- Additional engagement to identify potential constructs to add
- Expanded professional learning
- Additional staffing to support qualitative analysis and reporting

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Final Thoughts

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What questions do you have for us?

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Many thanks!

Early Learning Transition Check In Website:
https://oregonearlylearning.com/PreKCheckin

Email: PreKCheckin@ode.oregon.gov

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Oregon State Board of Education
June 13, 2024

AGENDA ITEM: 8.C.

SUBJECT: Students Experiencing Poverty Definition/OAR 581-014-0001 **STAFF NAME & OFFICE**: Jon Wiens, Director of Reporting, Accountability, and Data & Dan Farley, Assistant Superintendent for Research, Assessment, Data, Accountability, and Reporting HB 2060 (2021) amended the Student Success Act to require the State Board to adopt a definition of Economically Disadvantaged by rule. The Board adopted a definition at its December 2022 meeting. Staff are presenting an implementation update, as requested by the Board.	**Informational Presentation** **Written Report**

BACKGROUND

History and Purpose

Federal and state law require that the Oregon Department of Education (ODE) report information on students who are "economically disadvantaged." Federal law does not define this group. Oregon, along with almost all states, has historically reported a student as economically disadvantaged if the student is eligible to receive free or reduced price (FRP) school meals.

HB 2060 (2021) required the state board to adopt a definition of economically disadvantaged in rule, which the Board did at its December 2022 meeting. The new rule is effective July 1, 2023 and defines a student as Economically Disadvantaged if they meet one or more of the following requirements:

- Are eligible for Supplemental Nutrition Assistance Program (SNAP) or Temporary Assistance for Needy Families (TANF) benefits;
- Are in foster care;
- Are migrant; or
- Are experiencing houselessness

We are using the term "Students Experiencing Poverty" (SEP) for this group, to help distinguish it from the old definition that was based on free or reduced priced lunch eligibility. We shall use this terminology throughout the rest of this docket.

When adopting the rule, the State Board asked that ODE continue to look into additional students to include in this group, including students receiving Medicaid. The concern shared was that the current definition did not include students who are Compacts of Free Association (COFA) eligible, whom the Medicaid dataset could help incorporate.

ODE is implementing this definition for 2023-2024 school year reporting, and the purpose of this presentation is to provide an update on our implementation work.

SUMMARY OF PREVIOUS BOARD ACTION

In December 2022 the Board adopted the definition above as part of OAR 581-014-0001.

POLICY ISSUE OR CONCERNS

Implementation Progress Update

ODE and DHS have signed an initial data sharing agreement that allows specific ODE staff access to SNAP and TANF data for use in the SEP definition. This agreement allows ODE to calculate data for this student group for both federal and state reporting. The agency is still working with DHS to determine what district-level access might be feasible and defensible. These agreements take some time to complete, since there are several student privacy and security considerations that must be carefully worked out and specified in the agreements.

ODE staff are also working with OHA to gain access to Medicaid data. OHA has been working with the federal government to determine a response.

Communications

ODE staff will be developing communications tools to help district staff and the public understand any impacts of the new SEP definition. Here are some key points:

- State School Fund: The State School Fund is not affected. The poverty weight in the State School Fund is determined by the Small Area Income and Poverty Estimate (SAIPE) provided by the U.S. Census Bureau, as described in OAR 581-023-0102
- Student Investment Account: Allocations are not affected. These data are based on the weighted Average Daily Membership (ADMw) used for the State School Fund, as described in OAR 581-014-0004. As noted above, the State School Fund uses SAIPE data for its poverty weighting.
- District Title I: Allocations are not affected. Federal allocations of Title I dollars is also based on U.S. Census data poverty estimates.
- School Title I Designations: The percentage of students experiencing poverty is an allowed method for determining which schools receive federal Title I dollars, but it does not replace the existing options for determining which schools receive Title I funds.

ODE staff will be developing and publishing FAQs related to the transition to the new SEP metric.

EQUITY IMPACT ANALYSIS

Gaining access to Medicaid data will increase the number of students included in the group, and allow the data to better represent Oregon students navigating poverty, such as students from Compact of Free Association (COFA) nations. COFA students are not currently eligible for SNAP or TANF benefit, but are eligible for Medicaid.

FISCAL ANALYSIS

None.

ATTACHMENTS

None.