

Special Meeting and Work Session  
Tuesday, January 23, 2024 6:00 PM

Dr. Matthew Prophet Education Center - Board  
Auditorium  
501 N. Dixon St  
Portland, OR 97227

## **Agenda**

1. 6:00 pm - Update on School Closures
2. 6:10 pm - Consent Agenda - Resolutions 6828 - 6830 *Vote - Public comment accepted*
  - 2.(a) Resolution 6828 - Adoption of the Index to the Minutes
  - 2.(b) Resolution 6829 - Expenditure Contracts that Exceed \$150,000 for Delegation of Authority
  - 2.(c) Resolution 6830 - Authorization of Off-campus Activities
3. 6:15 pm - Resolution to Approve the Student Investment Account Grant Agreement (Resolution 6831) *Vote - Public comment accepted*
4. 6:20 pm - Early Literacy Grant Agreement Presentation  
*Public comment accepted*
5. 6:30 pm - Jefferson Modernization Update
6. 6:40 pm - Presentation of a Proposal by Albina Vision Trust
7. 7:05 pm - Legislative Agenda
8. 7:25 pm - Bond Planning

**RESOLUTION No. 6828**

Adoption of the Index to the Minutes

The Following Index to the Minutes are offered for Adoption:

- January 04, 2024 – Special Meeting
- January 09, 2024 – Regular Meeting



## Index to the Minutes

*(Draft for Approval)*

### Special Meeting

January 04, 2024

*This document is a record of the actions taken by the Board of Education. In accordance with ORS 192.650, the District's official School Board Meeting Minutes are maintained via video recording and may be viewed at <https://youtu.be/6sySzFTSEGg?si=blAnvccVNq5oHzRY>*

*This meeting was held at the Dr. Matthew Prophet Education Center (Prophet Center) located at 501 N Dixon St. Portland, OR 97217 and streamed live at: <https://www.youtube.com/@ppsboardofeducation/live>*

#### Board Member Attendance

Present: Chair Gary Hollands; Vice-Chair Herman Greene; Directors Julia Brim-Edwards, Michelle DePass, Andrew Scott, Patte Sullivan, and Eddie Wang; Student Representative Frankie Silverstein

Absent: None

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### RESOLUTIONS

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## **Agenda**

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<i>Time Started</i>	<i>Agenda Title</i>
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5:35 pm	Appointment of an Interim Superintendent with transition effective starting February 12, 2024
5:58 pm	Adjourned

## **Action Items**

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- **Resolution 6826 - Approval of the Appointment of Sandy Husk as Interim Superintendent, transition effective starting February 12, 2023**

Chair Hollands moved and Director Scott seconded the motion to approve Resolution 6826. The motion was put to a voice vote and passed (7 yes – 0 no).

Director Julia Brim-Edwards: Yes, Director Michelle DePass: Yes, Director Herman Greene: Yes, Director Gary Hollands: Yes, Director Andrew Scott: Yes, Director Patte Sullivan: Yes, Director Eddie Wang: Yes, Student Representative Silverstein: NA

## RESOLUTION No 6826

### Approval of the Appointment of Sandy Husk as Interim Superintendent, transition effective starting February 12, 2023

#### Recitals

- A. Given that Superintendent Guadalupe Guerrero announced his resignation as Superintendent effective February 16, 2024, the Board indicated it would hire an interim superintendent until a permanent superintendent is hired.
- B. At a December 19, 2023 meeting, the Portland Public Schools Board of Education defined the desired characteristics for the Interim Superintendent. They were:
  - 1. Track record as an effective district leader
  - 2. Track record of supporting equitable educational systems
  - 3. Experience as a superintendent
  - 4. Oregon school district experience
  - 5. Mid- to large-size school district experience or other large system experience
  - 6. Understands that the job is to keep Portland Public Schools moving forward versus disrupting/changing course
  - 7. Not a candidate for the permanent position
  - 8. Availability from mid-February through June 30, 2024
- C. Portland Public Schools policy 1.50.10-P Superintendent states, "it is the policy of the Board to delegate to the superintendent the full responsibility and responsibilities of the:
  - 1. Chief Administrative Officer
  - 2. Chief School Administrator
  - 3. Chief Executive Administrator
  - 4. Education Leader for the Portland Public Schools
  - 5. Custodian of School Funds, and
  - 6. School Clerk"
- D. There are open positions and hiring may need to occur at PPS for senior positions at the Chief level and higher during the tenure of an Interim Superintendent.

#### Resolution

- 1. The Board of Education for Portland Public Schools finds that Dr. Sandy Husk meets the criteria defined by the Board for the Interim Superintendent position, including 18 years as a superintendent, 7.5 years of which were as a superintendent of a large Oregon school district with a focus on improving student achievement for students of color. Dr. Husk also has served as the chief executive officer of the AVID Center, a national non-profit organization working in approximately 7,500 school districts and with about 2.5 million students impacted annually. Dr. Husk also has a Doctorate of Education from the University of Colorado in Denver.
- 2. The Board of Education hereby approves the appointment of Dr. Husk as the Interim Superintendent, with the transition beginning February 12, 2024, with the terms contained in the January 4, 2024 offer letter.
- 3. The Board authorizes the Interim Superintendent, in their discretion, to hire for senior positions at the Chief level and higher as long as the terms of employment for the specific position are approved by the Board of Education before a candidate is hired.



## Index to the Minutes

*(Draft for Approval)*

### Regular Meeting January 09, 2024

*This document is a record of the actions taken by the Board of Education. In accordance with ORS 192.650, the District's official School Board Meeting Minutes are maintained via video recording and may be viewed at <https://youtu.be/ZnxifYPDh14?si=6RhcdYVyslse7rpt>*

*This meeting was held at the Dr. Matthew Prophet Education Center (Prophet Center) located at 501 N Dixon St. Portland, OR 97217 and streamed live at: <https://www.youtube.com/@ppsboardofeducation/live>*

#### Board Member Attendance

Present: Chair Gary Hollands; Vice-Chair Herman Greene; Directors Julia Brim-Edwards, Michelle DePass, Andrew Scott, Patte Sullivan, and Eddie Wang; Student Representative Frankie Silverstein

Absent: None

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### RESOLUTIONS

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**Agenda**

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<i>Time Started</i>	<i>Agenda Title</i>
6:02 pm	Opening
6:03 pm	Franklin High School Jazz Quartet
6:12 pm	Board Leadership - Resolutions 6824 and 6825
6:15 pm	Student Representative's Report
6:19 pm	Student Comment
6:29 pm	Dual Language Immersion (DLI) Residencies Trips
7:10 pm	Annual Comprehensive Financial Report (ACFR) - Resolution 6812
7:22 pm	Amendment No. 1 to the Fiscal Year 2023-24 Budget for School District No. 1J, Multnomah County, Oregon - Resolution 6813
7:24 pm	Second Reading of Policy Rescissions and Revisions- Resolutions 6814-6817
7:31 pm	Public Comment
7:42 pm	Board Committee Conference Reports and Superintendent Search Update
7:46 pm	Implementation of Math Curriculum Update
9:22 pm	Integrated Grant Application
9:30 pm	2024-2025 Calendar Discussion
9:34 pm	Southeast Guiding Coalition Update
9:50 pm	First Reading of Policies
9:53 pm	Consent Agenda - Resolutions 6818-6823
9:59 pm	Comments from Union Partners
10:23 pm	Adjourn

**Student and Public Comment**

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General Student Comment

- Sarah Faik
- Frankie Kassell

General Public Comment

- Yasmin Correa
- Dean Williams

## Action Items

- **Consent Agenda – Resolutions 6818 through 6823**

Director Scott moved and Director DePass seconded the motion to approve the Consent Agenda, including Resolutions Number through Number. The motion was put to a voice vote and passed (7 yes – 0 no).

Director Julia Brim-Edwards: Yes, Director Michelle DePass: Yes, Director Herman Greene: Yes, Director Gary Hollands: Yes, Director Andrew Scott: Yes, Director Patte Sullivan: Yes, Director Eddie Wang: Yes, Student Representative Silverstein: Yes (Unofficial)

- **Second Reading of Policy Rescissions and Revisions – Resolutions 6814-6817**

Director Scott moved and Director Sullivan seconded the motion to approve Resolution Numbers 6814 through 6817. The motion was put to a voice vote and passed (7 yes – 0 no).

Director Julia Brim-Edwards: Yes, Director Michelle DePass: Yes, Director Herman Greene: Yes, Director Gary Hollands: Yes, Director Andrew Scott: Yes, Director Patte Sullivan: Yes, Director Eddie Wang: Yes, Student Representative Silverstein: Yes (Unofficial)

- **Resolution 6812 - Acceptance of the Annual Comprehensive Financial Report, Reports to Management and the Report on Requirements for Federal Awards**

Director Scott moved and Director Brim-Edwards seconded the motion to approve Resolution 6812. The motion was put to a voice vote and passed (7 yes – 0 no).

Director Julia Brim-Edwards: Yes, Director Michelle DePass: Yes, Director Herman Greene: Yes, Director Gary Hollands: Yes, Director Andrew Scott: Yes, Director Patte Sullivan: Yes, Director Eddie Wang: Yes, Student Representative Silverstein: Yes (Unofficial)

- **Resolution 6813 - Amendment No. 1 to the Fiscal Year 2023-24 Budget for School District No. 1J, Multnomah County, Oregon**

Director Brim-Edwards moved and Director Scott seconded the motion to approve Resolution 6813. The motion was put to a voice vote and passed (7 yes – 0 no).

Director Julia Brim-Edwards: Yes, Director Michelle DePass: Yes, Director Herman Greene: Yes, Director Gary Hollands: Yes, Director Andrew Scott: Yes, Director Patte Sullivan: Yes, Director Eddie Wang: Yes, Student Representative Silverstein: Yes (Unofficial)

- **Resolution 6824 - Election of Board Chairperson**

Director DePass moved and Director Brim-Edwards seconded the motion to approve Resolution 6824. The motion was put to a voice vote and passed (7 yes – 0 no).

Director Julia Brim-Edwards: Yes, Director Michelle DePass: Yes, Director Herman Greene: Yes, Director Gary Hollands: Yes, Director Andrew Scott: Yes, Director Patte Sullivan: Yes, Director Eddie Wang: Yes, Student Representative Silverstein: Yes (Unofficial)

- **Resolution 6825 - Election of Board Vice-Chairperson**

Director Brim-Edwards moved and Director Scott seconded the motion to approve Resolution 6825. The motion was put to a voice vote and passed (7 yes – 0 no).

Director Julia Brim-Edwards: Yes, Director Michelle DePass: Yes, Director Herman Greene: Yes, Director Gary Hollands: Yes, Director Andrew Scott: Yes, Director Patte Sullivan: Yes, Director Eddie Wang: Yes, Student Representative Silverstein: Yes (Unofficial)

**RESOLUTION No. 6812**

Acceptance of the Annual Comprehensive Financial Report, Reports to Management and the Report on Requirements for Federal Awards

**RECITALS**

- A. The Board of Education is committed to accountability for how Portland Public Schools spends its tax dollars and other resources, and recognizes that transparency, accuracy, and timeliness in financial reporting are important components of financial accountability.
- B. The District Auditor, Talbot, Korvola & Warwick, LLP, has completed their independent audit of the financial reporting for the year ended June 30, 2023, and provides assurance that the District's accounting and reporting are in compliance with generally accepted accounting principles.

**RESOLUTION**

The Board of Education accepts the Annual Comprehensive Financial Report, Reports to Management, and Report on Requirements for Federal Awards of School District No. 1J, Multnomah County, Oregon for the fiscal year ended June 30, 2023, and authorizes the reports to be distributed to required state and federal agencies and filed for future reference.

**RESOLUTION NO. 6813**

Amendment No. 1 to the Fiscal Year 2023-24 Budget for  
School District No. 1J, Multnomah County, Oregon

**RECITALS**

- A. On June 13, 2023, the Board of Education (“Board”), by way of Resolution No. 6718, voted to adopt an annual budget for the Fiscal Year 2023-24 as required under Local Budget Law; and
- B. Board Policy 8.10.030-AD, “Budget Reallocations - Post Budget Adoption,” establishes the guidelines to ensure consistent and detailed communication on fiscal issues between the Superintendent and the Board; and
- C. Oregon Local Budget Law, ORS 294.471, allows budget changes after adoption under prescribed guidelines; and
- D. This Amendment No. 1 amends the budget to align with current projections. Budget changes are summarized in Attachment A and include the following major components:
  - i. \$15,152,000 - General Fund (Fund 100)
    - 1. Increase the beginning fund balance to reflect 2022-23 unaudited actuals
    - 2. Increase resources in Local Property Tax, Other Local Sources, State Sources, Federal Sources
    - 3. Decrease resources in Local Option Taxes and County and Intermediate Sources
    - 4. Increase requirements in Instruction and Support Services, including temporary rate increase for substitute educators December 18-22
  - ii. \$8,744,000 - Special Revenue Fund (Fund 200)
    - 1. Adjust resources in the Student Investment Account and Integrated Grant and Early Literacy Grant
    - 2. Increase requirements in Instruction, Support Services, Enterprise and Community Services, and Contingency
  - iii. \$37,083,000 - Capital Projects Fund (Fund 400)
    - 1. Increase resources in Beginning Fund Balance and State Sources to reflect 2022-23 unaudited actuals
    - 2. Decrease resources in Other Revenue from Local Sources and Bond Proceeds & Premiums (bond proceeds were included in 2022-23)
    - 3. Increase requirements in Facilities Acquisition and Construction to reflect actual funds available
  - iv. \$0 - Internal Service Fund (Fund 600)
    - 1. Decrease requirements in Contingency \$1,000,000 and increase requirements in Support Services \$1,000,000 to true up to actual spend
- E. This resolution is to enable the Board to approve Amendment No. 1 to the annual budget for Fiscal Year 2023-24, and is allowed under ORS 294.471(a) (b) (c) (d) & (h), which states that the budget may be amended at a regular meeting of the governing body; and
- F. The Superintendent recommends approval of this resolution.

**RESOLUTION**

BE IT RESOLVED that the Board of Directors of Portland Public Schools hereby amends budgeted expenditure appropriation levels as summarized by Fund and Appropriation Level in Attachment A for the fiscal year beginning July 1, 2023.

**RESOLUTION No. 6814**

Resolution to Rescind Board Policy

Rescission of:

- i. 0.10.010-P Strategic Plan

**RECITALS**

A. On October 11, 2023, the Board of Education's Policy Committee reviewed and considered the necessity and relevance of:

- i. 0.10.010-P Strategic Plan

B. On November 28, 2023, the Board presented the first reading of the policy for rescission.

C. The public comment period was open for at least 21 days, and no public comments were received.

**RESOLUTION**

The Board hereby rescinds the following policy:

- i. 0.10.010-P Strategic Plan

and instructs the Superintendent to rescind and/or revise any administrative directives that are no longer accurate or relevant as a result of rescinding these policies.

**RESOLUTION No. 6815**

Resolution to Adopt Revised Policy District Performance Auditing 1.60.040-P

**RECITALS**

- A. On November 30 2023, the Board Policy Committee reviewed and considered the proposed revisions of the District Performance Auditing 1.60.040-P policy.
- B. On December 12, 2023, the Board presented the first reading of the revised District Performance Auditing policy.
- C. District Performance Auditing 1.60.040-P that was first read on December 13, 2023, has since been corrected to reflect a technical amendment to comply with Board Policy 1.20.014-P Board Committees, attached hereto as Exhibit A.
- D. Pursuant to District policy, the public comment was open for at least 21 days, and there was no public comment received during the comment period.

**RESOLUTION**

The Board hereby adopts the revised District Performance Auditing 1.60.040-P policy with the technical amendment to conform to Board Policy 1.20.014-P and instructs the Superintendent to amend any relevant administrative directives to conform to this adopted policy.

**RESOLUTION No. 6816**

Resolution to Adopt Revised Policy Student Enrollment and Transfers 4.10.051-P

**RECITALS**

- A. On November 30 2023, the Board Policy Committee reviewed and considered the proposed revisions of the Student Enrollment and Transfers 4.10.051-P policy.
- B. On December 12, 2023, the Board presented the first reading of the revised Student Enrollment and Transfers policy.
- C. Pursuant to District policy, the public comment was open for at least 21 days, and there was public comment received during the comment period.

**RESOLUTION**

- 1. The Board hereby adopts the revised Student Enrollment and Transfers 4.10.051-P policy and instructs the Superintendent to amend any relevant administrative directives to conform to this adopted policy.

**RESOLUTION No. 6817**

Resolution to Adopt New Policy Religious and Cultural Observances x.xx.xxx-P

**RECITALS**

- A. On September 18, October 11, and November 30 2023, the Board Policy Committee reviewed and considered the proposed new Religious and Cultural Observances x.xx.xxx-P policy.
- B. On December 12, 2023, the Board presented the first reading of the new Religious and Cultural Observances policy.
- C. Pursuant to District policy, the public comment was open for at least 21 days, and there was no public comment received during the comment period.

**RESOLUTION**

- 1. The Board hereby adopts the new Religious and Cultural Observances x.xx.xxx-P policy and instructs the Superintendent to amend any relevant administrative directives to conform to this adopted policy.

**RESOLUTION No. 6818**

The Following Index to the Minutes are offered for Adoption

- 12/12/23 – Regular Meeting

**RESOLUTION No. 6819**

Expenditure Contracts that Exceed \$150,000 for Delegation of Authority

**RECITAL**

Portland Public Schools (“District”) Public Contracting Rules PPS-45-0200 (“Authority to Approve District Contracts; Delegation of Authority to Superintendent”) requires the Board of Education (“Board”) enter into contracts and approve payment for products, materials, supplies, capital outlay, equipment, and services whenever the total amount exceeds \$150,000 per contract, excepting settlement or real property agreements. Contracts meeting this criterion are listed below.

**RESOLUTION**

The Superintendent recommends that the Board approve these contracts. The Board accepts this recommendation and by this resolution authorizes the Deputy Clerk to enter into the following agreements.

**NEW CONTRACTS**

<b>Contractor</b>	<b>Contract Term</b>	<b>Contract Type</b>	<b>Description of Services</b>	<b>Contract Amount</b>	<b>Responsible Admin, Funding Source</b>	<b>Certified Business</b>
IRS Environmental of Portland, Inc.	1/10/24 through 1/9/26 Option to renew for up to five additional one-year terms through 1/9/31	Services S 94390	On-call hazardous abatement services. Request for Proposals 2023-004	Not to Exceed \$3,000,000	D. Jung Funding Source Varies	No
Northstar CG, LP	1/10/24 through 1/9/26 Option to renew for up to five additional one-year terms through 1/9/31	Services S 94391	On-call hazardous abatement services. Request for Proposals 2023-004	Not to Exceed \$3,000,000	D. Jung Funding Source Varies	No
Performance Abatement Services, Inc.	1/10/24 through 1/9/26 Option to renew for up to five additional one-year terms through 1/9/31	Services S 94430	On-call hazardous abatement services. Request for Proposals 2023-004	Not to Exceed \$3,000,000	D. Jung Funding Source Varies	No
Professional Minority Group	1/10/24 through 1/9/26 Option to renew for up to five additional one-year terms through 1/9/31	Services S 94433	On-call hazardous abatement services. Request for Proposals 2023-004	Not to Exceed \$3,000,000	D. Jung Funding Source Varies	MBE, WBE
Pacific Northwest Environmental, LLC	1/10/24 through 1/9/26 Option to renew for up to five additional one-year terms through 1/9/31	Services S 94434	On-call hazardous abatement services. Request for Proposals 2023-004	Not to Exceed \$3,000,000	D. Jung Funding Source Varies	WBE
Rose City Contracting, Inc.	1/10/24 through 1/9/26 Option to renew for up to five additional one-year terms through 1/9/31	Services S 94436	On-call hazardous abatement services. Request for Proposals 2023-004	Not to Exceed \$3,000,000	D. Jung Funding Source Varies	No

\*A Certified Business is a for-profit business certified as a Minority-Owned Businesses (MBE), Women-Owned Businesses (WBE), Emerging Small Businesses (ESB), and/or Service-Disabled Veteran Businesses (SDV) by the State of Oregon Certification Office for Business Inclusion and Diversity.

**NEW COOPERATIVE PURCHASING AGREEMENTS**

<b>Contractor</b>	<b>Contract Term, Renewal Options</b>	<b>Administering Contracting Agency</b>	<b>Description of Goods or Services</b>	<b>Estimated Spend During Contract Term</b>	<b>Responsible Administrator, Funding Source</b>	<b>Certified Business</b>

**NEW INTERGOVERNMENTAL AGREEMENTS (“IGAs”)**

<b>Contractor</b>	<b>Contract Term</b>	<b>Contract Type</b>	<b>Description of Services</b>	<b>Contract Amount</b>	<b>Responsible Administrator, Funding Source</b>

**AMENDMENTS TO EXISTING CONTRACTS**

<b>Contractor</b>	<b>Amendment Term</b>	<b>Contract Type</b>	<b>Description of Services</b>	<b>Amendment Amount, Contract Amount</b>	<b>Responsible Admin, Funding Source</b>	<b>Certified Business</b>

New encumbered contracts: \$0

On-call, potential spend contracts: \$18,000,000

Amendments: \$0

**RESOLUTION No. 6820**

Revenue Contracts that Exceed \$150,000 Limit for Delegation of Authority

**RECITAL**

Portland Public Schools (“District”) Public Contracting Rules PPS-45-0200 (“Authority to Approve District Contracts; Delegation of Authority to Superintendent”) requires the Board of Education (“Board”) to enter into and approve all contracts, except as otherwise expressly authorized. Contracts exceeding \$150,000 per contractor are listed below.

**RESOLUTION**

The Superintendent recommends that the Board approve these contracts. The Board accepts this recommendation and by this resolution authorizes the Deputy Clerk to enter into the following agreements.

**NEW REVENUE CONTRACTS**

No New Revenue Contracts

**NEW INTERGOVERNMENTAL AGREEMENTS / REVENUE (“IGA/Rs”)**

<b>Contractor</b>	<b>Contract Term</b>	<b>Contract Type</b>	<b>Description of Services</b>	<b>Contract Amount</b>	<b>Responsible Administrator, Funding Source</b>
State of Oregon	7/1/23 through 6/30/25	Intergovernmental Agreement / Revenue IGA/R 94506	Funding for reengagement services.	\$250,000	C. Proctor Fund 205 Dept. 5485 Grant G2563

**AMENDMENTS TO EXISTING REVENUE CONTRACTS**

<b>Contractor</b>	<b>Contract Term</b>	<b>Contract Type</b>	<b>Description of Services</b>	<b>Contract Amount</b>	<b>Responsible Administrator, Funding Source</b>
State of Oregon	7/1/23 through 6/30/25	Intergovernmental Agreement / Revenue IGA/R 94417 Amendment 1	State funding for Head Start. Amendment adds FY24-25 funding.	\$8,157,302 \$16,314,605	C. Proctor Fund 205 Dept. 6303 Grant G2289

**RESOLUTION No. 6821**

Authorization for Off-Campus Activities

**RECITAL**

Portland Public Schools (“District”) Policy 6.50.010-P (“Off-Campus Activities”) requires the Board of Education (“Board”) consent to student out-of-state travel.

**RESOLUTION**

The Board has reviewed the request for out-of-state travel. All required documents have been submitted to the Risk Management Department. The Superintendent recommends that the Board consent to the student out-of-state travel for the below request:

**AUTHORIZATION FOR OFF-CAMPUS ACTIVITIES**

<b>Date(s)</b>	<b>School, Course, and Number of Students</b>	<b>Purpose of Travel</b>	<b>Travel Destination</b>	<b>Estimated Cost</b>	<b>Equitable Field Trip Fund; %</b>
1/13-1/16/24	BHS W Basketball, 12	Basketball tournament	Hiland High School in Berlin, Ohio	\$400	N/A

**RESOLUTION No. 6822**

Appointment of Custodial Civil Service Board Member

**RECITALS**

- A. The Portland Custodial Civil Service Board was established in 1937 following the passage of the Custodian Civil Service Bill (SB 260) by the Oregon Legislature.
- B. The Custodial Civil Service Board is an independent entity created under this law and is responsible for the oversight of the application and administration of the Custodial Civil Service Law (ORS 242.310 to 242.640 and ORS 242.990) in the Portland Public School District.
- C. Board Commissioners are appointed by the PPS Board of Education for a term of two, four or six years.
- D. There is a vacancy on the Custodial Civil Service Board.
- E. Paul Hathaway has been nominated to serve in Position 3 of the Custodial Civil Service Board for a term of six years.
- F. Paul Hathaway is an Oregon attorney who has been practicing for 5 years. He graduated from Lewis and Clark Law School in 2018 and began his career doing Social Security Disability work. For the last four years Mr. Hathaway has done insurance defense work in the construction defect realm, representing local and multi-state contractors in litigation matters and has a passion for labor and employment issues. Mr. Hathaway is a member of the Multnomah Bar Association's Professionalism Committee as well as recently joining the Oregon Association of Defense Counsel's leadership team for the Construction Practice Group as the publications liaison. A lifelong Oregon resident, Mr. Hathaway graduated from Hillsboro High School and has been a resident of Multnomah County since 2018.

**RESOLUTION**

- 1. Paul Hathaway is appointed to the Custodial Civil Service Board with an expiration date of January 9, 2030.

**RESOLUTION No. 6823**

Appointment of Community Budget Review Committee Student Representative Members

**RECITALS**

- A. The mission of the Community Budget Review Committee (CBRC) is to review, evaluate, and make recommendations to the Board of Education (Board) regarding the Superintendent's Proposed Budget and other budgetary issues identified by the CBRC or the Board. The CBRC receives its charge from the Board.
- B. On November 5, 2019, the voters of the Portland Public School (PPS) District passed a renewal Local Option Levy, Measure 26-207, which became effective in 2020, which mandated independent community oversight to ensure tax dollars are used for purposes approved by local voters, and the CBRC serves that function for PPS.
- C. The CBRC is composed of eight to twelve volunteer members. The Board appoints members to three-year terms with one or two student members appointed to one-year terms.
- D. The Board recognizes that District employees and community members bring specialized knowledge and expertise to the CBRC and budgetary review process. The Board instructs all CBRC members to employ discretion, avoid conflicts of interest or appearance of impropriety, and exercise care in performing their duties.
- E. In fall 2023, there was an open recruitment for three three-year terms and two one-year student representative terms. Three CBRC members were appointed by the Board to three-year terms on November 7, 2023. During this recruitment, no student applications were received.
- F. The application for student representatives remained open through November 30, 2023. Six students applied to join CBRC during the extended recruitment. All six students were interviewed.
- G. The CBRC Selection Committee members were: CBRC members Roger Kirchner and Tasz Ferguson, Alexandra Martin, Finance Program Manager, and Board Director Patte Sullivan.
- H. After the interview phase, the panel decided to advance two top-scoring students. The CBRC Selection Committee recommends the Board appoint: Mohammed (Mo) Damtew and Luke Susswood.

**RESOLUTION**

- 1. The Portland Public Schools Board of Education hereby appoints Mohammed (Mo) Damtew and Luke Susswood as student representative members of the Community Budget Review Committee for one-year terms through June 30, 2024.

January 09, 2024

**RESOLUTION No. 6824**

Election of Board Chairperson

Director Gary Hollands is hereby elected Chairperson of the Board for the period beginning January 9, 2024, until his successor is elected.

**RESOLUTION No. 6825**

Election of Board Vice-Chairperson

Director Herman Greene is hereby elected Vice-Chairperson of the Board for the period beginning January 9, 2024, until his successor is elected.

**RESOLUTION No. 6829**

Expenditure Contracts that Exceed \$150,000 for Delegation of Authority

**RECITAL**

Portland Public Schools (“District”) Public Contracting Rules PPS-45-0200 (“Authority to Approve District Contracts; Delegation of Authority to Superintendent”) requires the Board of Education (“Board”) enter into contracts and approve payment for products, materials, supplies, capital outlay, equipment, and services whenever the total amount exceeds \$150,000 per contract, excepting settlement or real property agreements. Contracts meeting this criterion are listed below.

**RESOLUTION**

The Superintendent recommends that the Board approve these contracts. The Board accepts this recommendation and by this resolution authorizes the Deputy Clerk to enter into the following agreements.

**NEW CONTRACTS**

Contractor	Contract Term	Contract Type	Description of Services	Contract Amount	Responsible Admin, Funding Source	Certified Business
Walter E Nelson Company	2/1/24 through 1/31/25  Option to renew for up to four additional one-year terms through 1/31/29	Materials Requirement MR 94570	Provide District with disposable products on an as-needed basis. Request for Proposals 2023-048	Original Term: \$550,000  Total through all renewals: \$2,750,000	D. Jung Fund 202 Dept. 5570	No

\*A Certified Business is a for-profit business certified as a Minority-Owned Businesses (MBE), Women-Owned Businesses (WBE), Emerging Small Businesses (ESB), and/or Service-Disabled Veteran Businesses (SDV) by the State of Oregon Certification Office for Business Inclusion and Diversity.

**NEW COOPERATIVE PURCHASING AGREEMENTS**

N/A

**NEW INTERGOVERNMENTAL AGREEMENTS (“IGAs”)**

N/A

**AMENDMENTS TO EXISTING CONTRACTS**

Contractor	Amendment Term	Contract Type	Description of Services	Amendment Amount, Contract Amount	Responsible Admin, Funding Source	Certified Business
PBS Engineering & Environmental, Inc.	1/24/24 through 12/31/25	Cooperative Contract COA 91023 Amendment 2	Funding for an additional year of project management/construction management for district-wide environmental health and safety projects.	\$278,400 \$1,551,400	D. Jung Funding Source Varies	No
Myonghoon Leigh	1/24/24 through 4/30/24	Personal Services PS 93710 Amendment 1	Deputy Superintendent of Business and Operations services. This amendment extends the contract and adds funds to contract.	\$75,000 \$220,000	S. Reese Fund 101 Dept. 5461	No

New encumbered contracts: \$0

On-call, potential spend contracts: \$2,750,000

Amendments: \$353,400



**RESOLUTION No. 6831**

**Resolution to Approve the Student Investment Account Grant Agreement**

**RECITALS**

- A. The Student Success Act requires that the Student Investment Account (SIA) Grant Agreement be presented to the Portland Public Schools Board of Education for approval with the opportunity for the public to provide comments.
- B. On January 9, 2023, the Portland Public Schools Board of Education reviewed the Student Investment Account (SIA) Grant Agreement in a public board meeting including the longitudinal performance growth targets.

**RESOLVED**

Following posting on the PPS website and the oral presentation and opportunity for public comment at a public meeting, the Board of Education approves the Student Investment Account Grant Agreement.



## PORTLAND PUBLIC SCHOOLS

501 North Dixon Street / Portland, OR 97227

Telephone: (503) 916-2000

Mailing Address: P. O. Box 3107 / 97208-3107

### STAFF REPORT

**To:** Portland Public Schools Board of Directors

**From:** Leslie O'Dell, Sr. Director of Funded Programs

**CC:** Superintendent Guadalupe Guerrero  
Dr. Cheryl Proctor, Deputy Superintendent Instruction & School Communities  
Myong Leigh, Interim Deputy Superintendent, Business & Operations  
Dr. Renard Adams, Chief of Research, Assessment & Accountability.  
Jonathan Garcia, Chief of Staff  
Kristina Howard, Interim Chief Academic Officer  
Dr. Jon Franco, Chief of Schools  
Jey Buno, Chief of Student Support Services

**Date:** December 27, 2023

**Subject:** **Grant Agreements for ODE's Aligning for Student Success: Integrated Guidance for Six ODE Initiatives (Integrated Grants)**

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The purpose of this memo is to present ODE's Integrated Grant Agreements for Board approval. Once approved, ODE will begin distributing the \$57.5 million in grant funds to PPS for the 2023-2024 school year. The grant funding is included in the Special Revenue fund.

#### **Background Information for the PPS Integrated Grant Plan and Priorities**

In March 2023, the Board approved the PPS Integrated Grant Plan.

The grant investments deepen and expand our work to disrupt inequities, foster inclusive partnerships and collaboration, and provide inclusive and differentiated learning opportunities. Our plan aligns investments, activities, and specific strategies from our [Strategic Plan](#). Key priorities for the plan were identified in our needs assessment – priorities also expressed by our community:

The plan includes investments in focal student groups and schools based on need, emphasizing improving culturally responsive, site-based learning experiences.

- Improved classroom experience
- Stronger multi-tiered systems of support, including wrap-around social, emotional, mental, and behavioral health services
- Racial equity and social justice (RESJ) partnerships with local nonprofit organizations to support Students of Color

- Restorative justice advocates, who build and strengthen community, and repair harm, as part of our work to reorient discipline
- Professional learning to complement and deepen our bond and general fund investments in new core curricula and instructional framework
- Personalized learning, with differentiated and flexible experiences that increase access to arts, interest-based electives, self-directed learning, and engagement
- Career-related programming that emphasizes real-world, hands-on learning
- Data-driven continuous improvement

Please find additional details on the PPS Integrated Grant Plan [here](#).

### Key Information & Updates

The Integrated Grant Agreements align with the PPS Integrated Grant Plan that the Board approved in March 2023 and also include two key updates to the Plan.

- The final allocation for PPS is \$57.5M, which represents a \$5.6M increase from the preliminary allocation of \$51.9M. (Note: while the strategies and outcome for the plan will remain the same, the level of grant investments in specific activities will continue to shift in alignment with the district’s budget amendment.)

Grant Program	Preliminary Allocation	Change in Allocation	Final Allocation
High School Success (HSS)	\$13,397,923	-\$1,133,891	\$12,264,032
Student Investment Account (SIA)	\$36,431,620	\$6,621,083	\$43,052,703
Continuous Improvement Planning (CIP)	\$1,507,230	\$0	\$1,507,230
Career Technical Education - Perkins V (CTE)	\$435,071	\$95,960	\$531,031
Every Day Matters (EDM)*	\$0	\$0	\$0
Early Indicators & Intervention Systems (EIS)	\$130,764	-\$1,079	\$129,685
<b>Total Allocation</b>	<b>\$51,902,608</b>	<b>\$5,582,073</b>	<b>\$57,484,681</b>

\* EDM is unfunded and requirements are embedded in the five other programs.

- The Integrated Grant Agreements include Longitudinal Performance Growth Targets (LPGTs).

### Longitudinal Performance Growth Targets & ODE’s New Statewide Evaluation Framework

As mentioned in the Staff Memo for the Student Investment Account (SIA) annual report, the statewide evaluation and reporting requirements for SIA are changing significantly under [ODE’s Integrated Grant Guidance](#).

ODE required districts to co-develop Longitudinal Performance Growth Targets (LPGTs) with them. The LPGTs are a statutory requirement based on the “5 common metrics”, which are:

- Third-grade reading proficiency rates
- Ninth-grade on-track rates
- Regular attendance rates
- Four-year or on-time graduation rates
- Five-year completion rates

The specific LPGTs are outlined in the presentation accompanying this memo. While they have similarities to the PPS Board Goals, there are distinct differences.

ODE Required LPGTs	PPS Board Goals
<ul style="list-style-type: none"> <li>● Required by the Student Success Act passed in 2019; implemented for 2023-2024</li> <li>● Focuses efforts on a super-group of students called the “combined focal group.”</li> <li>● Part of a statewide standardized evaluation framework</li> <li>● Co-developed with ODE</li> </ul>	<ul style="list-style-type: none"> <li>● Rigorous targets set with Board direction</li> <li>● Focus efforts for success on student racial groups most in need of academic acceleration to close predictable and persistent gaps in student outcomes</li> <li>● Aligned with our Strategic Plan</li> </ul>

### ODE’s Integrated Grant Agreements

ODE has the following approval requirements for the SIA Grant Agreements:

- Posted on the PPS website
- Presented at an open meeting with opportunity for public comment
- Approved by the Board

Once completed, ODE will begin distributing the grant funds.

Please find the PPS SIA Grant Agreement for your approval:

- [Portland Public Schools](#)

Included in the district agreement are the signed District Charter Program Agreements for the following schools.

- District-sponsored Charter Schools
  - Emerson School
  - Le Monde French Immersion Public Charter School
  - Portland Arthur Academy: Integrated Plan & Budget
  - Portland Village School
- State-sponsored Charter Schools
  - Cottonwood School of Civics and Science
  - The Ivy School

***Thank you for your support as we navigate the changes and complexities of ODE’s Integrated Grant Guidance requirements while also ensuring sound investments for our students.***



**FORWARD**  
**TOGETHER**

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# ODE Integrated Grant Guidance Plan

January 9, 2024

# Presentation Content

- Reground in scope and purpose of ODE's Integrated Guidance and Grants
- Allocation and Investment Updates
- ODE's Evaluation and Progress Monitoring Requirements
- Grant Agreements
- Questions and Comments

# Allocation & Investment Updates

# PPS Integrated Grant Plan



ODE's Aligning for Student Success: Integrated  
Guidance for Six ODE Initiatives

PPS Plan - March 2023



PORTLAND PUBLIC SCHOOLS

<https://www.pps.net/Page/20662>

- PPS Plan approved by the Board in March 2023
- Part of the Special Revenue Funds Restricted dollars from grants  
High School Success (M98)  
Student Investment Account (SIA)  
Career Technical Education (CTE)  
Early Indicator & Intervention System (EIS)
- ***ODE issued the Grant Agreements in Nov 2023. Once approved by the Board, ODE will begin distributing the \$57.5M.***

# 2023-2024 ODE Allocation Adjustments by Program

Program	Preliminary Allocation	Change in Allocation	Final Allocation
High School Success (HSS)	\$13,397,923	-\$1,133,891	\$12,264,032
Student Investment Account (SIA)	\$36,431,620	\$6,621,083	\$43,052,703
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\* EDM is unfunded and requirements are embedded in the five other programs.

# PPS Integrated Plan Investment Highlights

## Student Investment Account

- Instructional coaches K-12
- Improve class size across K-12 schools
- Improve arts education pathway
- Kindergarten education assistants
- Mental & behavioral health, substance abuse
- School counselors
- School-based social workers
- School-based restorative justice support
- Culturally-specific community partnerships
- Allocation to CBO **and** charter schools

## CSI/TSI Activity Budget

- Educator prof. development at CSI/TSI schools

## High School Success (Measure 98)

- High school college coordinators
- Student attendance coaches
- Student success team (SST) leads and instructional coaches
- SST Release time
- CTE teachers and other staff
- 8th grade transition & 9th grade success
- Expand college and career awareness, exploration and preparation
- AP coursework supports for students of color

**Since 2017-18, CTE enrollment at PPS has doubled (5,000 to over 10,000 students)!**

# ODE Evaluation & Progress Monitoring Requirements

# ODE Metrics for Statewide Evaluation Framework

## Longitudinal Performance Growth Targets (LPGTs)

- Data provided to PPS by ODE for longitudinal analysis
- Guidance established by ODE for the Student Success Act requirement
- LPGTs co-developed by PPS and ODE

### “5 Common Metrics”

- 3rd grade reading proficiency
- 9th grade on-track rates
- Regular attendance rates
- 4 year or on-time graduation
- 5 year completion rates

# ODE Requirements vs PPS Board Goals

## ODE Required Longitudinal Performance Growth Targets (LPGTs)

- Required by the Student Success Act passed in 2019, implemented for 2023-2024, Co-developed with ODE
- Focuses efforts on a super-group of students (“combined focal”)
- Part of a statewide standardized evaluation framework

## PPS Board Goals For Our Students

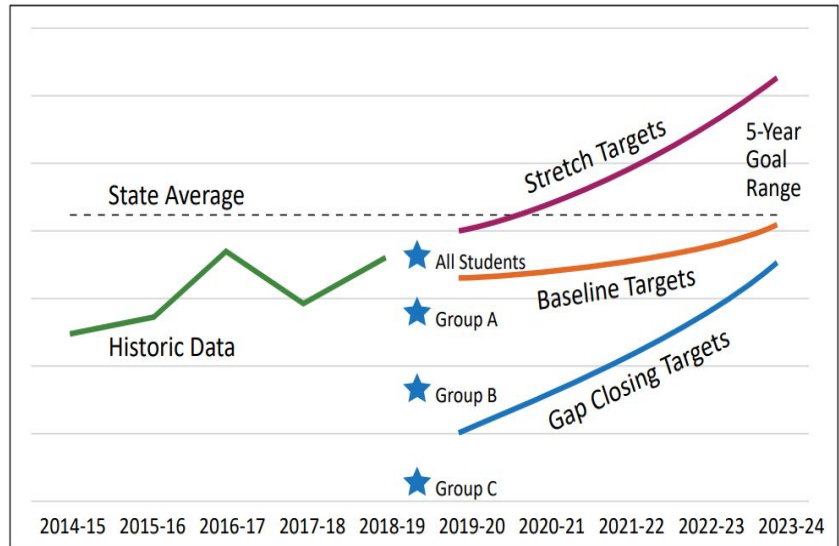
- Rigorous targets set with Board direction
- Focus efforts for success on student racial groups most in need of academic acceleration to close predictable and persistent gaps in student outcomes
- Aligned to our Strategic Plan

# ODE Requirements: Longitudinal Performance Growth Targets

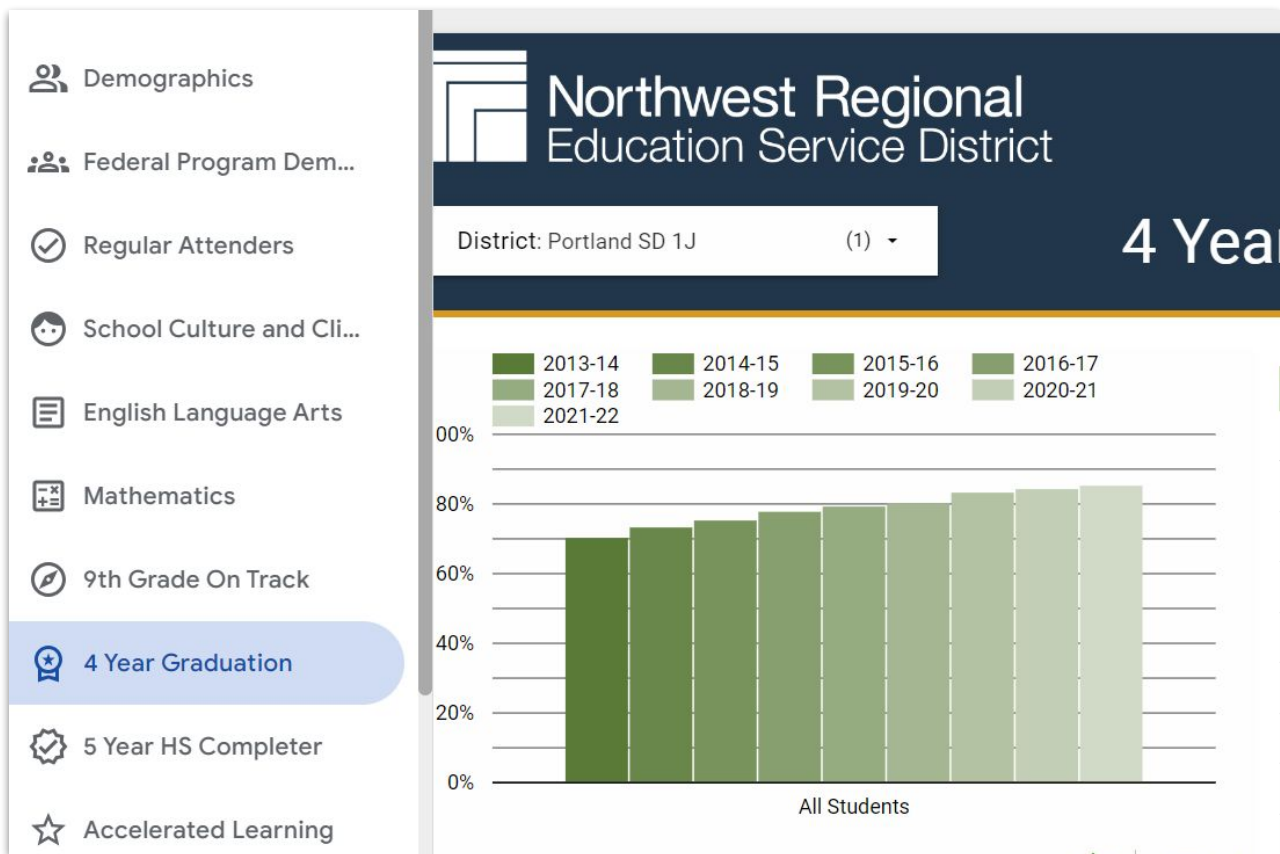
## 5 Year Targets

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

## Visual Example



# ODE Dashboard: Includes the 5 Common Metrics



Link to: [Oregon Data Dashboard - Portland](#)

# Grant Agreements

# PPS SIA Grant Agreement

ODE GRANT #34466 – 2023-24 SSA SIA

## STATE OF OREGON GRANT AGREEMENT

“Student Success Act – Student Investment Account”

Grant No. 34466

This Grant Agreement (“Grant”) is between the State of Oregon acting by and through its Department of Education (“Agency”) and Portland SD 1J (“Grantee”), each a “Party” and, together, the “Parties”.

### SECTION 1: AUTHORITY

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

### SECTION 2: PURPOSE

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

### SECTION 3: EFFECTIVE DATE AND DURATION

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

## ODE SIA Grant Agreement Approval Requirements

- ✓ Posted on the PPS website
- ✓ Presented at an open meeting with opportunity for public comment
- ✓ Approved by the Board

Thank you.

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### SECTION 4: GRANT MANAGERS

#### 4.1 Agency’s Grant Manager is:

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

**4.2** Grantee’s Grant Manager is:

Guadalupe Guerrero  
Portland SD 1J  
501 N. Dixon St.  
Portland, OR 97208-3107

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

## **SECTION 5: PROJECT ACTIVITIES**

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

## **SECTION 6: GRANT FUNDS**

In accordance with the terms and conditions of this Grant, Agency will provide Grantee up to \$43,052,702.87 (“Grant Funds”) for the Project. Agency will pay the Grant Funds from monies available in the Student Investment Account (“Funding Source”). A reduction in the monies in the Funding Source may result in a decrease in Grant Funds available to Agency.

## **SECTION 7: DISBURSEMENT GENERALLY**

### **7.1 Disbursement.**

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

deficiencies were corrected.

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

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

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

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

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

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

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

## SECTION 8: REPRESENTATIONS AND WARRANTIES

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

**8.1.1** Grantee is a District duly organized and validly existing;

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

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

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

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

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

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

## SECTION 9: OWNERSHIP

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

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

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

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

## **SECTION 10: CONFIDENTIAL INFORMATION**

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

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

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

## SECTION 11: INDEMNITY/LIABILITY

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

## SECTION 12: INSURANCE

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

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

## **SECTION 13: GOVERNING LAW, JURISDICTION**

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

## **SECTION 14: ALTERNATIVE DISPUTE RESOLUTION**

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

## **SECTION 15: DEFAULT**

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

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

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

## **SECTION 16: REMEDIES**

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

## **SECTION 17: WITHHOLDING FUNDS, RECOVERY**

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

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

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

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

## SECTION 18: TERMINATION

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

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

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

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

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

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

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

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

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

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

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

## SECTION 19: MISCELLANEOUS

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

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

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

## SECTION 20: SIGNATURES

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

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

### **STATE OF OREGON acting by and through its Department of Education**

By: Philip Hofmann  
Contracting Officer

11/08/2023  
Date

### **Portland SD 1J**

By: \_\_\_\_\_  
Authorized Signature

\_\_\_\_\_  
Date

\_\_\_\_\_  
Printed Name

\_\_\_\_\_  
Title

\_\_\_\_\_  
Federal Tax ID Number

### **Approved for Legal Sufficiency in accordance with ORS 291.047**

By: Jake Hogue  
Assistant Attorney General

November 8, 2023, via email  
Date

# EXHIBIT A THE PROJECT

## SECTION I – BACKGROUND AND GOALS

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

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

The SIA grants are for two purposes:

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

## SECTION II – PROJECT DEFINITIONS

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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

### SECTION III – PROJECT ACTIVITIES

#### Integrated Plan Implementation

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

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

Grantees must use the Grant Funds only for:

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

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

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

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

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

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

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

**Subsection 2. Charter School Relationships**

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

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

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

Charter School(s)		
	<input type="checkbox"/> Fully Administered	<input checked="" type="checkbox"/> Partially Administered
	<input type="checkbox"/> Fully Administered	<input checked="" type="checkbox"/> Partially Administered
	<input type="checkbox"/> Fully Administered	<input checked="" type="checkbox"/> Partially Administered
	<input type="checkbox"/> Fully Administered	<input checked="" type="checkbox"/> Partially Administered
	<input type="checkbox"/> Fully Administered	<input checked="" type="checkbox"/> Partially Administered
	<input type="checkbox"/> Fully Administered	<input checked="" type="checkbox"/> Partially Administered

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

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

**SECTION IV – REPORTING REQUIREMENTS**

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

**Financial Reports**

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

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

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

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

### **Integrated Plan Performance Reporting**

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

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

### **SIA Grant Monitoring**

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

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

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

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

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

**SECTION V – DISBURSEMENT and REPORTING PROVISIONS**

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

<b>Disbursement Date</b>	<b>Quarterly Amount</b>
<b>July 1</b>	<b>25% of funds allocated</b>
<b>October 1</b>	<b>25% of funds allocated</b>
<b>January 1</b>	<b>25% of funds allocated</b>
<b>April 1</b>	<b>25% of funds allocated</b>

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

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

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

**October 31**

**January 31**

**April 30**

**November 30 (Annual Report)**

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

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

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

## EXHIBIT B COMMON AND CUSTOMIZED PERFORMANCE FRAMEWORK PORTLAND SD 1J

### SECTION I – PROGRESS MARKERS FOR 2023-2025 BIENNIUM

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

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

#### A. Start to See: Early Signs of Progress

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

**B. Gaining Traction: Intermediate Changes**

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

**C. Profound Progress: Substantial and Significant Changes**

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

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

**SECTION II – FINALIZED CO-DEVELOPED LPGTS**

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

Target Type	2023-24	2024-25	2025-26	2026-27	2027-28
<b>Four Year Cohort Graduation</b>					
<b>Baseline Target: All Students</b>	<b>86.20%</b>	<b>86.70%</b>	<b>87.20%</b>	<b>87.70%</b>	<b>88.20%</b>
<b>Stretch Target: All Students</b>	<b>86.68%</b>	<b>87.68%</b>	<b>88.68%</b>	<b>89.68%</b>	<b>90.68%</b>
<b>Gap-Closing Target: All Focal Group Students</b>	<b>80.00%</b>	<b>81.00%</b>	<b>82.00%</b>	<b>83.00%</b>	<b>84.00%</b>
<b>Five Year Cohort Completion</b>					
<b>Baseline Target: All Students</b>	<b>90.20%</b>	<b>90.40%</b>	<b>90.60%</b>	<b>90.80%</b>	<b>91.00%</b>
<b>Stretch Target: All Students</b>	<b>90.60%</b>	<b>91.20%</b>	<b>91.80%</b>	<b>92.40%</b>	<b>93.00%</b>
<b>Gap-Closing Target: All Focal Group Students</b>	<b>86.10%</b>	<b>87.10%</b>	<b>88.00%</b>	<b>89.00%</b>	<b>90.00%</b>

<b>9th Grade on-Track</b>					
<b>Baseline Target: All Students</b>	<b>90.36%</b>	<b>90.66%</b>	<b>90.96%</b>	<b>91.26%</b>	<b>91.56%</b>
<b>Stretch Target: All Students</b>	<b>90.81%</b>	<b>91.56%</b>	<b>92.31%</b>	<b>93.06%</b>	<b>93.81%</b>
<b>Gap-Closing Target: All Focal Group Students</b>	<b>85.83%</b>	<b>86.83%</b>	<b>87.83%</b>	<b>88.83%</b>	<b>89.83%</b>
<b>3rd Grade ELA Proficiency</b>					
<b>Baseline Target: All Students</b>	<b>56.80%</b>	<b>57.90%</b>	<b>58.90%</b>	<b>60.00%</b>	<b>61.00%</b>
<b>Stretch Target: All Students</b>	<b>57.40%</b>	<b>58.90%</b>	<b>60.50%</b>	<b>62.00%</b>	<b>63.60%</b>
<b>Gap-Closing Target: All Focal Group Students</b>	<b>39.60%</b>	<b>42.70%</b>	<b>45.90%</b>	<b>49.00%</b>	<b>52.10%</b>
<b>Regular Attenders</b>					
<b>Baseline Target: All Students</b>	<b>70.00%</b>	<b>71.00%</b>	<b>72.00%</b>	<b>73.00%</b>	<b>74.00%</b>
<b>Stretch Target: All Students</b>	<b>71.00%</b>	<b>74.00%</b>	<b>77.00%</b>	<b>80.00%</b>	<b>83.00%</b>
<b>Gap-Closing Target: All Focal Group Students</b>	<b>50.00%</b>	<b>53.00%</b>	<b>56.00%</b>	<b>59.00%</b>	<b>62.00%</b>

**SECTION III – APPROVED LOCAL OPTIONAL METRICS (IF APPLICABLE)**

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

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

## **EXHIBIT C INSURANCE**

### **INSURANCE REQUIREMENTS**

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

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

### **WORKERS' COMPENSATION & EMPLOYERS' LIABILITY**

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

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

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

### **COMMERCIAL GENERAL LIABILITY**

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

### **AUTOMOBILE LIABILITY INSURANCE**

**Required**  **Not required**

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

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

**PROFESSIONAL LIABILITY**

**Required**  **Not required**

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

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

**EXCESS/UMBRELLA INSURANCE**

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

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

**ADDITIONAL INSURED**

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

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

**WAIVER OF SUBROGATION**

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

**CONTINUOUS CLAIMS MADE COVERAGE**

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

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

**CERTIFICATE(S) AND PROOF OF INSURANCE**

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

**NOTICE OF CHANGE OR CANCELLATION**

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

**INSURANCE REQUIREMENT REVIEW**

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

**STATE ACCEPTANCE**

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

**Additional Coverages That May Apply:**

**DIRECTORS, OFFICERS AND ORGANIZATION LIABILITY:**

**Required**    **Not required**

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

**PHYSICAL ABUSE AND MOLESTATION INSURANCE COVERAGE:**

**Required**    **Not required**

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

# PPS Early Literacy Success Grant Application



PORTLAND  
Public Schools

January 23, 2024

# Presentation Overview

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## Agenda:

- Overview of ODE's Early Literacy Success District Grant
- PPS Early Literacy Plan (current state & next steps)
  - Research-Aligned Curriculum
  - Professional Development & Coaching
  - Extended Learning Programs
  - High-Dosage Tutoring
  - Hiring
- Budget Review

## Presenters:

- Kristina Howard, Interim Chief Academic Officer
- Dr. Emily Glasgow, Senior Director PreK-5 Core Academics
- Melissa Schachner, Director K-5 English Language Arts & Social Studies
- Darcy Soto, Director Learning Acceleration

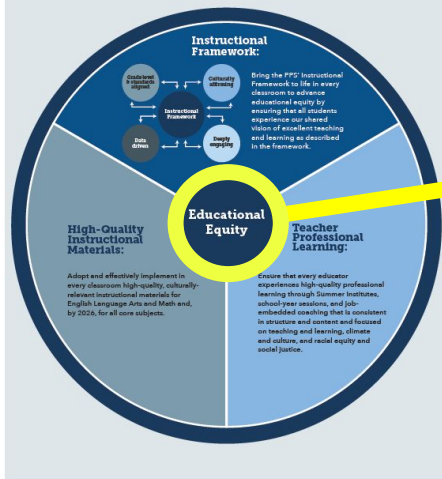
# Our Why: Educational Equity



## Our Roadmap Toward Educational Equity for All PK-12 Students

PPS is committed to providing all students with high-quality teaching and learning in every classroom, every day - instruction that helps them achieve our Graduate Portrait and closes persistent gaps in outcomes based on race.

In partnership with teachers, school leaders, and staff from across the district, we're taking several important steps to make this vision a reality for all students: collaborating around a new instructional framework that articulates a shared vision of highly effective teaching and learning, adopting new curricula to support that instruction, and offering improved professional learning experiences for teachers aligned to both.



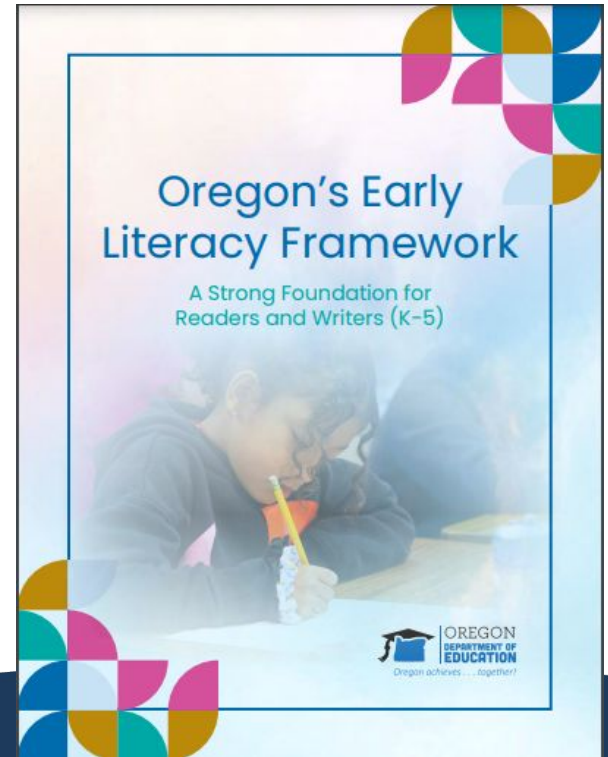
## Our Why: Educational Equity

Raising the achievement of all students while (1) eliminating the gaps between the lowest and highest performing students and (2) eliminating the racial predictability and disproportionality of which student groups occupy the highest and lowest achievement categories.

# OR Early Literacy Success Initiative (HB 3198)

In 2023, the OR Legislature established early literacy as a top priority. In creating the **Early Literacy Success Initiative**, they identified four goals:

1. Increase early literacy for children from **birth to third grade**;
2. Reduce literacy **academic disparities** for student groups that have historically experienced academic disparities;
3. Increase **support to parents and guardians** to enable them to be partners in the development of their children's literacy skills and knowledge; and
4. Increase access to early literacy learning through support that is **research-aligned, culturally responsive, student-centered and family-centered**.



# Early Literacy Success School District Grant

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## Overall ODE Information:

[\(application guidance\)](#)

What: Non-competitive, application-based, annual grant-in-aid for school districts

Why: To support comprehensive early literacy plans that are research-based and culturally responsive

When: Application due Jan. 8, 2024 (Board review/approval submitted by Feb. 28, 2024)

How much: \$90 mil for 2023-25 biennium

## PPS Information:

What: Use of funds to supplement and extend existing investments in early literacy

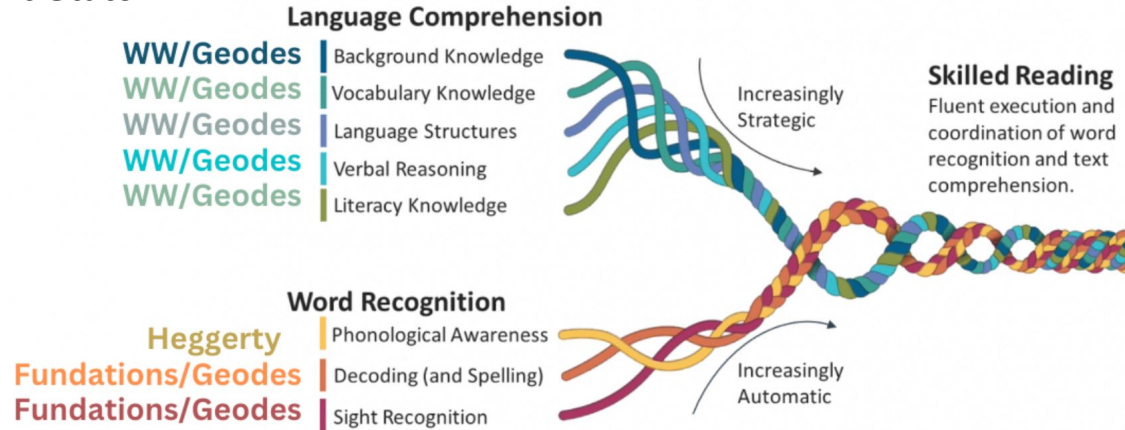
When: Application submitted on Jan. 5, 2024 (Board review on Jan. 23, 2024/Vote on Feb. 6, 2024)

How much: \$6,697,684 for 2023-25 biennium (split evenly across two years with option to roll funds)

# Research-Aligned Curriculum

## Allowable Expense Category #1

### Current State



Scarborough, H. 2001. Connecting early language and literacy to later reading (dis)abilities: Evidence, theory, and practice. Pp. 97-110 in S. B. Neuman & D. K. Dickinson (Eds.) *Handbook of Early Literacy*. NY: Guilford Press.

### Grant Extension

- Heggerty for PreK

# Professional Development & Coaching

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## Allowable Expense Category #2

### Current State:

- K-5 teachers trained in core curriculum materials;
- Ongoing professional learning cycles to internalize and implement the curriculum;
- School-based coaches to support planning and implementation;
- 143 PPS educators fully LETRS-trained ([LETRS study](#))

### Grant Extension:

- PreK PD on phonological awareness/Heggerty;
- Year-long intensive Science of Reading PD and bridge to practice coaching for approx. 20 schools/year;
- Funds to support Wit & Wisdom module unpacking at school sites

# Extended Learning Programs

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## Allowable Expense Category #3

### Current State:

- Early Kindergarten Transition at 18 Title I sites;
- 2023 Summer Acceleration Academy served 2,278 students at 17 sites--majority of students were rising first and second graders (funded by ESSER and SIA)

### Grant Extension:

- Maintain funding of Early Kindergarten Transition (with enhanced literacy focus);
- Maintain funding of Summer Acceleration Academy for identified 1st-3rd grade students

# High-Dosage Tutoring

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## Allowable Expense Category #4

### Current State:

- Launched High Dosage Tutoring in 2021-22 (ESSER funded);
- Expanded tutoring model 2022-23 yielding promising results (ESSER funded);
- Paused implementation in Nov 2023 due to teachers' strike and budget uncertainty

### Grant Extension:

- Develop resources and supports to implement High Dosage Tutoring embedded in the school day (through WIN Block) as well as after school
- Fund High Dosage Tutoring supports for after school tutoring for 2nd and 3rd grade students

# Hiring

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## Allowable Expense Category #5

### Current State:

- School-based instructional coaches at each K-5 school (generalists);
- 38 school-based interventionists;
- 1 Director of K-5 English Language Arts & Social Studies

### Grant Extension:

- 6 school-based Early Literacy Coaches to provide 1:1 bridge to practice coaching in Science of Reading K-3 classrooms;
- 7 additional school-based interventionists;
- 1 Early Literacy Specialist to support cadre of Early Literacy Coaches

# Grant Budget (2023-25)--[link here](#)

Investment	FY24-FY25 (Total: \$6,697,684)
PreK Phonological Awareness Curriculum & PD	\$126,320
Year-Long Science of Reading PD (~20 schools)	\$2,008,000
Wit & Wisdom Unpacking/Internalization sessions	\$195,364
Early Literacy Coaches (~6, school-based)	\$750,000
Early Literacy Specialist (1, central)	\$150,000
Early Literacy Interventionists (7, school-based/student-facing)	\$840,000
Early Kindergarten Transition (18 sites/summer)	\$650,000
Summer Acceleration Academy (450 students/summer)	\$650,000
High-Dosage Tutoring	\$1,000,000
Indirect Costs	\$328,000

Tab: START HERE

Select your institution from the drop down list to the right: 2180-Portland SD 1J

Please provide contact information for the person completing this budget

Name Emily Glasgow

Phone 503-729-4763

Email [eglasgow@pps.net](mailto:eglasgow@pps.net)



Grant Allowable Use Category						Overall Literacy Budget (23-24)	
		--	--	--	--	Total Allocation 2023-24 (Autofill from Start Here tab):	\$3,281,865.69
		--	--	--	--	Total Budgeted Amounts (Autosum):	\$3,281,865.69
						Unbudgeted (Autocalculate):	(\$0.00)
	Proposed Investment	FTE	FTE Type	Allowable Use Code	Object Code	4th or 5th Grade Expenditure	Literacy Budget (23-24)
Purchasing Curricula & Materials	Initial purchase of Heggerty <b>phonemic awareness curriculum</b> (digital and hard copy) for 51 PreK classroom teachers and PreK coaching staff			CRCM	4XX		\$110,000.00
Professional Development & Coaching	Initial <b>Heggerty PD</b> for PreK pilot teachers			CTPD	31X		\$850.00
Professional Development & Coaching	Initial <b>Heggerty PD</b> for PreK pilot teachers (extended hours)			CTPD	13X		\$1,800.00
Professional Development & Coaching	Year-long sequence of asynchronous and synchronous <b>Science of Reading PD</b> for up to 20 PK-5 school staffs, instructional coaches, and PreK educators (research modules and research-to-practice modules applying knowledge to adopted HQIM)-- <i>PK-3 staff only</i>			PDC	31X		\$1,168,000.00
Professional Development & Coaching	Year-long sequence of asynchronous and synchronous <b>Science of Reading PD</b> for up to 20 PK-5 school staffs and PreK educators (research modules and research-to-practice modules applying knowledge to adopted HQIM)-- <i>4-5 staff only</i>			PDC	31X	Yes	\$340,000.00
Professional Development & Coaching	Substitute coverage in participating <b>Science of Reading</b> schools to allow for monthly completion of asynchronous modules			PDC	12X		\$500,000.00
Extended Learning Programs	Curriculum and home reading supplies in preparation for Summer 2024 <b>Early Kindergarten Transition</b> program @ 18 PPS sites			ELPO	4XX		\$150,000.00
Extended Learning Programs	Literacy curriculum for <b>Summer 2024 Acceleration Academies</b> @ PPS sites (grades 1-3)			ELPSS	4XX		\$50,000.00
Extended Learning Programs	Professional development for <b>Summer 2024 Acceleration Academies</b> educators @ PPS sites (grades 1-3)			ELPSS	13X		\$100,000.00
High-Dosage Tutoring	<b>High-dosage tutoring</b> for up to 200 students in need of Tier 3 intervention (2nd & 3rd grade, two 10-week cycles)			SGHDT	13X		\$697,215.69
Administrative Costs	<b>Indirect charge</b> (PPS Grants Accounting support)				690		\$164,000.00

Tab: Budget 24-25

Grant Allowable Use Category							Overall Literacy Budget (24-25)
		--	--	--	--	Total Allocation 2024-25 (Autofill from Start Here)	\$3,415,819.39
		--	--	--	--	Total Budgeted Amounts (Autosum):	\$1,534,034.39
						Unbudgeted	\$1,881,785.00
	Proposed Investment	FTE	FTE Type	Allowable Use Code	Object Code	4th or 5th Grade Expenditure	Literacy Budget (24-25)
Purchasing Curricula & Materials	Heggerty <b>phonemic awareness curriculum</b> for 51 PreK teachers and PreK coaches (annual digital licenses)			CRCM	4XX		\$6,000.00
Professional Development & Coaching	<b>Heggerty PD</b> for all PreK teachers			CTPD	31X		\$850.00
Professional Development & Coaching	<b>Heggerty PD</b> for all PreK teachers (extended hours)			CTPD	13X		\$6,820.00
Professional Development & Coaching	Substitute coverage for school-based <b>Wit &amp; Wisdom unpacking/internalization days</b> led by school-based instructional coaches (sub days/school to be used at discretion of Principal/ILT)-- <i>K-3 staff only</i>			CTPD	12X		\$195,364.39
Hiring	6	Literacy Coach	PDC	111			\$552,600.00
Hiring			PDC	2XX			\$197,400.00
Hiring	1	Literacy Specialist	PDC	111			\$110,520.00
Hiring			PDC	2XX			\$39,480.00
Extended Learning Programs			ELPO	111			\$202,620.00
Extended Learning Programs			ELPO	112			\$110,520.00
Extended Learning Programs			ELPO	2XX			\$111,860.00

# Application Guidance: *Early Literacy Success School District Grants*

## Part I: Grant Overview & Program Details for the Jumpstart Biennium 23-25

### **Introduction**

- Aligning to Integrated Guidance
- The Role of Oregon's Early Literacy Framework

### **Allowable Uses of Funding**

#### **Funding**

- Eligibility
- Consortia
- Allocations & Claims
- Matching Funds

### **Overview of the Application Process**

#### **Application Requirements**

#### **School Board or Governing Body Approval**

#### **Meaningful Reporting**

#### **Prioritization**

## Part II: Planning & Applying for the Jumpstart Biennium 23-25

### **Detailed Application Planning Instructions**

1. Program Review
2. Professional Development and Coaching
3. Extended Learning Programs
4. High-Dosage Tutoring
5. Student Growth Assessment
6. Communication Plan
7. Matching Funds
8. Assurances

### **Detailed Literacy Inventory and Budget Instructions**

9. Inventory
10. Budget 23-24/24-25

### **Appendix A: Definitions and Helpful Terms**

### **Appendix B: Evaluation Criteria**



### Revision Summary: Version 1.1 – Updated 10/23/2023

Page	Revision Summary
9-10, 19, 26-30, 34, 50-53	Updated language in guidance, Application Question, Evaluation Criteria, and Assurances clarifying what is required of allowable use planning, reporting, and implementation.
13	Typo corrected in the Allocation & Claims table.  Date for timeline of funding corrected.
27	Clarifying language added about professional development and coaching reporting.
32	Updated language to clarify communication versus engagement for the communication plan.





# Part I: Grant Overview & Program Details for the Jumpstart Biennium 23–25

## Introduction

In 2023, through the leadership of Governor Kotek, the Oregon Legislature established early literacy as a top priority. In creating the Early Literacy Success Initiative, they identified four goals:

1. Increase early literacy for children from birth to third grade;
2. Reduce literacy academic disparities for student groups that have historically experienced academic disparities;
3. Increase support to parents and guardians to enable them to be partners in the development of their children’s literacy skills and knowledge; and
4. Increase access to early literacy learning through support that is research-aligned, culturally responsive, student-centered and family-centered.



These goals will be accomplished through four programs: the Early Literacy Success School District Grants, the Early Literacy Success Community Grants, the Early Literacy Success Tribal Grants, and the Birth through Five Literacy Plan.

**Early Literacy  
Success  
Tribal Grants**



**Early Literacy  
Success  
Community Grants**



**Early Literacy  
Success School  
District Grants**



**Birth  
through Five  
Literacy Plan**



This guidance focuses on the Early Literacy Success School District Grants.

### **Roles and Authority for the Early Literacy Success School District Grants**

**Legislature:** The requirements of the grants were established in the Early Literacy Success Initiative legislation (House Bill 3198) passed by the legislature and signed into law by Governor Kotek.

**State Board of Education:** The bill requires the State Board of Education to develop rules in specific sections to add clarity to the policy. The State Board of Education's authority is constrained to fit within the scope of the bill and it cannot alter the contents of the bill or the requirements it establishes.

**Oregon Department of Education:** ODE has the authority to administer the grants, monitor and support grantees, and report on implementation. ODE's authority is tied to statutory authority, administrative rules, and grant administration.

*Stated simply, the requirements for the Early Literacy Success School District Grants were established by the legislature and the Oregon Department of Education is functioning in an administrative role to communicate those requirements and support districts in meeting them.*



The overall requirements for the Early Literacy Success School District Grants are that applicants must:

- **Develop and submit an early literacy plan** which includes:
  - Four-year goals for improving early literacy outcomes for students (*not required for the Jumpstart biennium.*)
  - A review of their early literacy program<sup>1</sup>, including their early literacy curriculum<sup>1</sup>.
  - A student growth assessment to measure student progress in early literacy, disaggregated by student groups that have historically experienced academic disparities<sup>2</sup>.
  - A description of how they will provide:
    - “professional development and coaching”<sup>2</sup> to teachers and administrators;
    - extended learning<sup>2</sup> by teachers or qualified tutors<sup>2</sup>; and
    - high-dosage tutoring<sup>2</sup> by qualified tutors (in addition to instruction, two or more times each week over at least a 10-week period).
- **Provide an inventory** of early literacy assessments, curriculum, and other instructional tools and materials.<sup>2</sup>
- **Provide a plan to communicate** with school districts, elementary schools<sup>2</sup> of the school district, families of the school district, and members of the school district community.
- **Match funding** at 25% (except for applicants <50 ADMw).
- **Report on required elements**, including but not limited to:
  - student participation in extended learning and tutoring (disaggregated),
  - staff participation in professional development (disaggregated),
  - updates to the inventory,
  - the curricula in use, and
  - fidelity of use of materials submitted in the inventory.
- **Generally, ensure that allowable uses and required activities use researched-aligned literacy strategies**, meaning they are literacy-focused, culturally responsive and relevant to diverse learners, and based on the long-term research derived from the science of reading and writing, specifically:
  - The teaching of phonemic awareness, phonics, fluency, vocabulary and comprehension through explicit and systematic instruction, which is
  - Differentiated to meet the needs of individual learners through developmentally appropriate practices.<sup>2</sup>

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<sup>1</sup> See Appendix A for the definitions of these important terms

<sup>2</sup> See Appendix A for the definitions of these important terms.



The requirements above are more fully explained in the rest of this document, specifically how they pertain to the application and planning process for the first biennium of the grant, or the “Jumpstart Biennium” as described below. The Application (in Smartsheet) will open December 1st and closes on January 8th.

## Document Purpose & Scope

This document provides district and charter school applicants with information to help inform planning for the grant. Part I contains information to support strategic and operational planning. Part II contains explanations, definitions, and requirements for applying as well as detailed requirements for each allowable use. For the purposes of this document, “applicant” refers to districts and eligible public charter schools<sup>3</sup> (see Part I: Eligibility).

### Jumpstart Biennium (2023–2025)

The Early Literacy Success Initiative passed at the end of the 2023 session and went into effect immediately when Governor Kotek signed it on August 2nd, 2023. The timeline for districts to build a plan and apply for funds is very fast. As a result, the first biennium of implementation--and especially the first year--serves as a jumpstart for districts, a “Jumpstart Biennium.” To that end, the application and application process for the Jumpstart Biennium:

- Serve as an on-ramp for districts beginning to implement early literacy changes and provide space for collective statewide learning, adjustment, and growth.
- Provides clarity while honoring a longer, thoughtful timeline to develop more specificity through public engagement and input, including through the permanent rule making process with the State Board of Education.
- Allows for time and space for community engagement and input on district early literacy plans and mid- to long-term strategy, while honoring the urgency of the moment and timeline set forth in the legislation.
- Accommodates the business and programmatic need of districts beginning a new grant partway through a school year and biennium, laying the groundwork for alignment with Integrated Guidance ultimately.

The Jumpstart Biennium may feel different for grantees than future bienniums. This application cycle is a baseline for practices and planning. As we move into future bienniums, early literacy programming will be more mature and progress towards goals will be well underway--as this occurs, the expectations for future applications and district plans will likely be more rigorous as well. State Board permanent rulemaking will also factor into the evolution of the evaluation criteria and requirements.

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<sup>3</sup> See Appendix A for the definition of this important term.



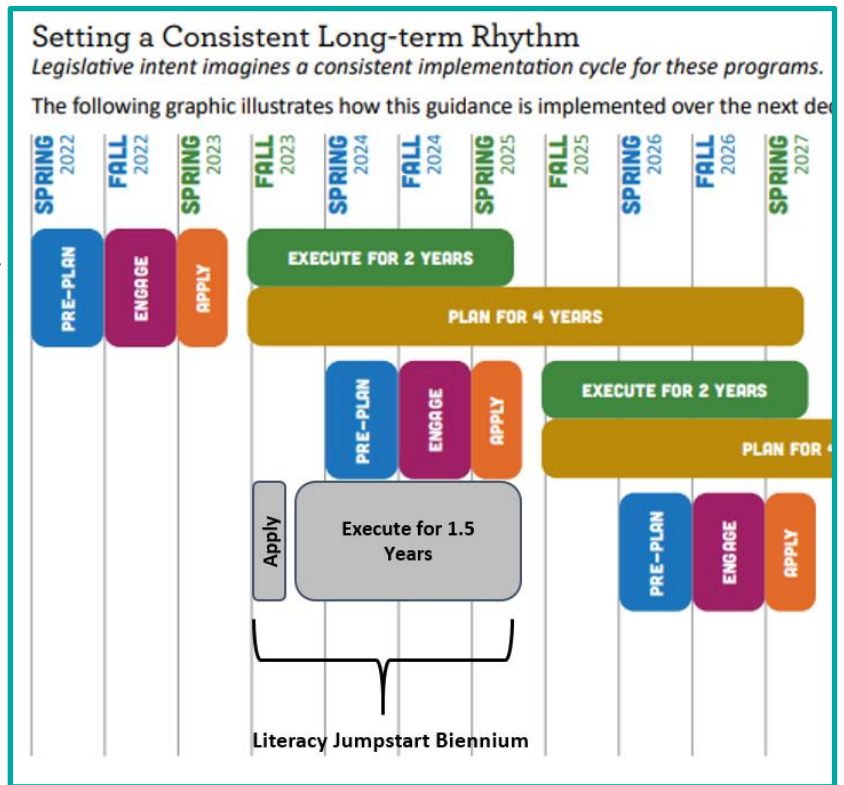
Image 1. Jumpstart Biennium superimposed on the Integrated Guidance timeline. [Click here for full alt text.](#)

## Aligning to Integrated Guidance

The Early Literacy Success School District Grants were designed to align with “[Aligning for Student Success: Integrated Guidance for Six ODE Initiatives.](#)” Application and reporting for the Early Literacy Success School District Grants will be fully integrated in March of 2025. Throughout the Jumpstart Biennium, applicants should include planning for these grants as part of their Integrated Guidance planning efforts in anticipation of that alignment date.

## The Role of Oregon’s Early Literacy Framework

[Oregon’s Early Literacy Framework](#) sets a vision for research-aligned, culturally responsive early literacy instruction. It is an anchor resource for districts planning for their Early Literacy Success School District Grants and is the basis of the required program review, determining local strengths and areas of need (see Part II: Program Review). In addition, through the Framework, applicants can build a clearer vision of how the investments from the Early Literacy Success School District Grants might look and sound in action.



## Definitions & Helpful Terms

A few of the most overarching definitions and terms follow with a full list included in Appendix A: Definitions and Helpful Terms.

### Definitions

The Early Literacy Success School District Grant legislation defines “research-aligned literacy strategies” as strategies that are:

- literacy focused; culturally responsive and relevant to diverse learners; based on long-term research derived from the science of reading and writing; and apply instructional practices that are developmentally appropriate and specifically designed for students with disabilities and students who are English language learners.

Additionally, the “science of reading and writing” is defined as the:

- convergence of findings from research on reading and writing processes, development and instruction; and
- teaching of phonemic awareness, phonics, fluency, vocabulary and comprehension through explicit and systematic instruction that can be differentiated to meet the needs of individual learners through developmentally appropriate practices.

### Helpful Terms

A few of the additional terms for applicants include:

- “Early literacy program” should be considered as the entirety of the curriculum, assessments, instructional materials, practices, systems, staffing, and structures in place to support comprehensive early literacy across the district.
- “Professional development” for this grant can be considered similarly to its definition as articulated in the Oregon Department of Education’s Integrated Guidance: *learning opportunities that support educators and administrators in instructional strategies for equity-centered, research-aligned, and culturally responsive literacy instruction that considers the context of each district, may elevate critical topics in system change strategies for early literacy, and support educators in leveraging high-quality, research-aligned instructional materials and curriculum to serve all students.*
- “Coaching” – Where this law names “coaching” it should be understood as an array of practices that support teachers through regular feedback and practice, formally or informally, to support implementation of research-aligned literacy practices and student learning.



Where definitions have not yet been specified through permanent rule making, the Framework provides direction for activities and ideas relevant to the grant program. Definitions will also be clarified through the permanent rulemaking process for future applications.

Oregon's Early Literacy Framework serves as a connection between these definitions and how they operationalize in the allowable uses of grant funds. It supports district planning by informing answers to questions such as:

- What does "researched-aligned" look like in literacy instruction?
- What does it mean for assessments, curriculum, and instruction to be "culturally responsive" and to serve students who are emergent bilingual or experiencing disabilities?
- What is the "convergence of findings from research on reading and writing"?
- How do we make choices about our grant activities that are aligned to the language and vision of the legislation?

## Allowable Uses of Funding

The Early Literacy Success School District Grants allow funding of the following research-aligned activities:

- Adoption and implementation of curricula;
- Employment of literacy specialists, coaches, or interventionists;
- Professional development and coaching;
- Extended learning programs; and
- High-dosage tutoring.

These activities provide opportunities to actualize the ideas, practices, and concepts in Oregon's Early Literacy Framework.

One of the grant application requirements is that applicants must submit a plan to provide and ultimately report on professional development and coaching, extended learning programs, and high-dosage tutoring. The information shared in planning and reporting is about an applicant's overall literacy implementation and is not narrowed just to this new fund source. Applicants may use other fund sources to operationalize these activities and will report on the status of implementation regardless of fund source



For the Jumpstart Biennium, applicants describe their plan to implement professional development and coaching, extended learning programs, and high-dosage tutoring. If applicants are not yet able to implement all three activities, applicants must submit a rationale and describe how they will plan to do so in the future.

For additional information and examples, see the [Early Literacy Success School District Grant FAQ](#).

The details of each of these allowable uses are described in Part II of this guidance, in the section of the application where the planning of that allowable use is most relevant, as shown in the table below:

Allowable Use <sup>4</sup>	Section within Part II of Guidance
Adoption and implementation of curricula	Detailed Literacy Inventory and Budget Instructions: <i>Budget</i>
Employment of literacy specialists, coaches, or interventionists.	Detailed Literacy Inventory and Budget Instructions: <i>Budget</i>
Professional development and coaching*	Detailed Application Requirements Instructions: <i>Professional Development &amp; Coaching</i>
Extended learning programs*	Detailed Application Requirements Instructions: <i>Extended Programs</i>
High-dosage tutoring*	Detailed Application Requirements Instructions: <i>High-dosage tutoring</i>

**Note:** Reporting will be required on each category of allowable use, including the use of matching funds, even if funding is not directed for each allowable use. Example: A recipient gets \$85K for the biennium and directs all investment into one of the allowable use areas. Reporting will still include updates related to any activities with other fund sources in the other areas, even if not investing dollars from this initiative into that area.

<sup>4</sup> It should be noted that the scope and definitions for many of the allowable uses require additional specificity and clarification. This guidance provides recommendations for applicants to support planning in the Jumpstart Biennium, recognizing that further clarification will come through the permanent rulemaking process for future implementation.



## Administrative Costs

A grant recipient may use funds for administrative costs, including indirect costs, directly related to allowed expenditures as provided in the grant agreement. Administrative costs are limited to 5 percent of the total expenditures. Administrative costs may be put towards costs associated with applying.

## Allowable Grade Levels

The grant funds must be used to support elementary grades, which are defined as any grade from pre-kindergarten<sup>5</sup> through 3rd grade. There is an allowance for funds to support literacy in 4th grade and 5th grade, which comes with additional requirements and limitations (see Part 1: Matching Funds and Part II: Matching Funds). Applicants may focus on one grade level, though applying and reporting requires information to be provided for kindergarten–3rd grade and pre-kindergarten, 4th grade, and 5th grade as applicable.

# Funding

This section provides program details related to funding, eligibility, and considerations for how applicants may collaborate in an effort to be efficient in applying and maximize impact on students through shared programmatic efforts.

## Eligibility

Any school district or public charter school with students in pre-kindergarten through grade three may apply for this noncompetitive grant. Virtual public charter schools are not eligible for Early Literacy Success School District Grants.

## Consortia

Any district or charter school that applied as an Aligned Program Consortium,<sup>6</sup> must apply in that same consortium for the Early Literacy Success School District Grants. A charter that is sponsored by a district is not considered an Aligned Program Consortium and will need to apply on their own.

Aligned Program Consortium members will:

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<sup>5</sup> See Appendix A for the definition of this important term.

<sup>6</sup> As defined under Oregon Department of Education's [Aligning for Student Success: Integrated Guidance for Six ODE Initiatives](#).



- submit one application
- provide an amended Memorandum of Understanding (MOU) to include Early Literacy Success School District Grants,
- receive one grant agreement, and
- report on the Early Literacy Success School Grant program implementation as one grantee.

## MOU

An amended Memorandum of Understanding (MOU) to include the Early Literacy Success School District Grants must be revised and signed by all eligible members<sup>7</sup> of the consortium to:

- define consortium operations as it relates to Early Literacy, and
- articulate the reporting structure as it relates to Early Literacy.

This amended MOU will be uploaded as an additional attachment required as part of the submission for the Early Literacy Success School District Grant application.

Please keep in mind that:

- A single joint application from an Aligned Program Consortium for the Early Literacy Success School District Grants *must be approved by each partnering school district's or applicant's governing board* and meet all other application requirements.

## Collaboration

It is important to understand the differences between participating in an Aligned Program Consortium and collaborating. Those in an Aligned Program Consortium formally combine their allocations under one grant agreement with one lead organization ultimately responsible for all deliverables and expenditures under the grant. However, if the applicants are not a part of an Aligned Program Consortium this biennium, the Oregon Department of Education encourages applicants to collaborate with other applicants in their regions and/or their ESD partners. Through collaborative efforts, grantees can pool resources together through contracts, agreements, or other means, while each grantee remains independently responsible for submitting an application and receives their own grant agreement and is independently responsible for all grant deliverables and expenditures.

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<sup>7</sup> If a member of the Aligned Program Consortium is not eligible to receive Early Literacy Success School District Grant funds, they will be excluded from plans and expenditures.



## Allocations & Claims

The following table provides a state-level picture of the funding for the Early Literacy Success School District Grants. Preliminary allocations for each district, school, or eligible grantee are provided on the [Early Literacy Success Initiative website](#).

Statewide Total for the 23-25 Jumpstart Biennium	Allocation Calculation	Allocation Method	Administrative Costs	Timeline for Spending
\$90,567,594.00	Based on Second Period Extended ADMw; calculated yearly	Disbursement	Limited to 5 percent of the total expenditures	For the Jumpstart Biennium – October 1, 2023– Sept 30, 2025. Funds roll from Year One to Year Two, unless an applicant does not apply. <sup>8</sup>

As indicated on the table above, these are formula grants based on Second Period Extended ADMw. In addition to the formula, a funding floor supporting Oregon’s smallest districts was set at approximately \$85,000 for the Jumpstart Biennium.

The Early Literacy Success School District Grants are disbursement grants, thereby allowing grantees to claim a percentage of funds in advance of expenditures. Taking into account the administrative burden of grantees to continuously submit claims in EGMS, the Oregon Department of Education proposes all fiscal agents submit their claims during the following designated windows:

Claim Window Year 1, 2023-2024	Amount of Claim
March 1 – March 31, 2024 <sup>9</sup>	65% of allocation
April 1 – April 30, 2024	35% of allocation (up to 100%)

<sup>8</sup> A Universal Summer Extension was approved in temporary rules and anticipated in permanent rules.

<sup>9</sup> Claims may be made as soon as the grant agreement is fully executed.



Claim Window Year 2, 2024–2025	Amount of Claim
July 1–July 30, 2024 <sup>10</sup>	25% of allocation
October 1 – October 31, 2024	25% of allocation (up to 50%)
January 1 – January 31, 2025	25% of allocation (up to 75%)
April 1 – April 30, 2025	25% of allocation (up to 100%)

For the Jumpstart Biennium, grantees are allowed to backdate expenditures to October 1, 2023, ahead of grant agreements being fully executed.

Any allocated funds that are not used by a grant recipient at the end of the biennium will be returned to the Statewide Education Initiatives Account. Grant recipients must initiate a Fiscal Return to the Oregon Department of Education when their fourth quarter report is complete.

## Matching Funds

The Early Literacy Success School District Grants require a match of 25% of each district’s total allocation. This match can be from any fund source. Fund sources can include Federal Title Funds, State School Funds, or any other funding source available to the applicant.

### In Support of Small & Rural Districts

For districts with an ADMw <50, the 25% match and any additional matches for 4th/5th grade expenditures will be waived.

Applicants are not limited to spending matching funds on the allowable uses described above, though are highly encouraged to do so. Matching funds for the Jumpstart Biennium, pending permanent rule making, can be used broadly to support literacy across pre-kindergarten through 5th grade.

<sup>10</sup> Claims may be made as soon as the grant agreement is fully executed.



For the Jumpstart Biennium, there is an allowance to spend funds supporting 4th and 5th grade students. This allows applicants to consider the strengths and needs of multilingual students, students experiencing disabilities, students whose learning was impacted by school closures during COVID, and other students who may need additional support in later grades as their early literacy develops. This allowance is unlikely to continue beyond the Jumpstart Biennium.

Grantees are limited on how much of their allocation can be used to support 4th and 5th grade students and there is an additional match required.

- **Limitation:** Up to 20% of a district’s overall allocation can be spent on supporting 4th and 5th grades in the first year, and up to 10% in the second year. This allowance is only made for the Jumpstart Biennium (2023–2025).
- **Match:** Any funds up to the amounts named above must be matched. Similar to the overall 25% match, these match requirements can come from any fund source. The match requirement for 4th and/or 5th grade expenditures is the same as the limitation: 20% in 2023–2024 and 10% in 2024–2025.

The overall 25% match on the total allocation is *inclusive* of the 4th and/or 5th grade match requirement. For example, if a district uses the full 20% limitation supporting 4th and/or 5th grades in the first year and provides the 25% match for the total allocation as required, the 20% match for 4th/5th grade is fulfilled; there is no additional matching requirement.

The following table offers a visual of the limitations and match requirements described above:

	Match Requirement	Limitation
Overall Allocation	25% of the overall allocation	
4th & 5th Grade 2023–2024 <sup>11</sup>	Met by the 25% match requirement	20% Limitation
4th & 5th Grade 2024–2025 <sup>12</sup>	Met by the 25% match requirement	10% Limitation

<sup>11</sup> Grantees are not *required* to spend funds on 4th and 5th grade literacy.

<sup>12</sup> Grantees are not *required* to spend funds on 4th and 5th grade literacy.



## Overview of the Application Process

The requirements for the grant application (described in the next section) have been incorporated into six resources for applicants:

- I. [Oregon's Early Literacy Framework](#) and the [Early Literacy Playbook](#) provide the content to engage in deep learning and frame the big picture of effective early literacy.
- II. The [Program Review Tool](#) guides applicants through applying the Framework to their given setting and includes eight questions that will be required in the Application.
- III. The [Application Planning Template](#) is a practical tool in which an applicant lays out what they will be required to submit alongside the Inventory and Budget.
- IV. The [Literacy Inventory and Budget](#) includes the template for the inventory required by the legislation and provides pre-populated budget cells that help to plan for allowable expenses. This will be required as an attachment in the Application.
- V. This **Guidance** document helps summarize the legislation and lays out how the grant program works, while providing clarity in what will be expected and reviewed.
- VI. The **Application** holds all of the questions in the Template as well as the questions in the Program Review Tool and will be the location for uploading the Literacy Inventory and Budget. It comes via Smartsheet on **December 1st (and closes on January 8th)** and will align with the Integrated Guidance tools and reporting infrastructure.

The questions in the Application Planning Template will be submitted by copying them into the Application (in Smartsheet). Similarly, to complete the Program Review Tool questions in the Application, applicants will need to complete the Program Review Tool then copy them into the Application. The Literacy Inventory and Budget is separate because it contains additional application elements that are best represented in a table format.



## An Important Note about Tribal Consultation

Honoring the sovereignty of Native American and tribal students, families, communities, and Nations in Oregon is central to effective planning and outreach. In the 2025–27 biennium, the Early Literacy Success School District Grants will become a part of Integrated Guidance and applicants will be expected to engage Native American and/or tribal students as focal student groups; in some cases, applicants will also be required to engage in formal Tribal consultation processes as outlined in the [ODE Tribal Consultation Toolkit](#). Information about Oregon’s nine federally recognized tribes is on the [Oregon Tribal Website’s page](#).

## Application Requirements

To be eligible for an Early Literacy Success School District Grant, a district must submit an application that includes specific components. The table below shows how these requirements will be submitted.

Required Components of Application	How Each Component is Submitted
1. A <b>Early Literacy Plan</b> , containing:	
<ul style="list-style-type: none"> <li>○ Four-year goals (not applicable for the Jumpstart Biennium)</li> </ul>	Not applicable this biennium
<ul style="list-style-type: none"> <li>○ A review of the applicant’s early literacy program</li> </ul>	Program Review Tool (questions 1–8) that will be entered in the Application
<ul style="list-style-type: none"> <li>○ A review of the applicant’s early literacy curriculum</li> </ul>	Inventory in the Literacy Inventory and Budget that will be uploaded into the Application



Required Components of Application	How Each Component is Submitted
<ul style="list-style-type: none"> <li>○ A student growth assessment for all students, disaggregated by student groups that have historically experienced academic disparities.</li> </ul>	<p>Inventory in the Literacy Inventory and Budget that will be uploaded into the Application</p> <p>Student Growth Assessment question in the Application Planning Template and the Application</p>
<ul style="list-style-type: none"> <li>○ A description of how the applicant will provide professional development and coaching, extended learning programs, and high-dosage tutoring.</li> </ul>	<p>Professional Development and Coaching, Extended Learning Programs, and High-Dosage Tutoring questions in the Application Planning Template and the Application</p>
<p>2. An <b>Inventory</b> which must be accurate and up-to-date, including literacy assessments, tools, curricula and digital resources used to support literacy in the applicant’s early elementary grades.</p>	<p>Inventory in the Literacy Inventory and Budget that will be uploaded into the Application</p>
<p>3. A <b>Communication Plan</b> for efforts to support engagement between school districts, elementary schools of the school district, families, and members of the school district community.</p>	<p>Communication Plan question in the Application Planning Template and the Application</p>
<p>4. Submission of board minutes as evidence that the Early Literacy Plan was <b>presented and approved by the applicant’s school board</b> or governing body, at an open meeting, with opportunity for public comment (this cannot be a consent agenda item).</p>	<p>Board minutes uploaded into the Application Planning Template and the Application</p>
<p>Identification of <b>matching funds</b>, as described in later sections.</p>	<p>Matching Funds question in the Application</p>



## Three Important Points of Clarification

- For the Jumpstart Biennium, applicants describe their plan to implement professional development and coaching, extended learning programs, and high-dosage tutoring. If applicants are not yet able to implement all three activities, applicants must submit a rationale and describe how they will plan to do so in the future.
- The Program Review Tool provides the criteria by which applicants must review their early literacy program.
- For the Jumpstart Biennium, the Application and Literacy Inventory and Budget serve as a district's Early Literacy Plan.

## School Board or Governing Body Approval

Applications must be presented to and approved by the school district board or the governing body of the public charter school at an open meeting with opportunity for public comment.

As evidence of this requirement, applicants must submit a copy of the board minutes when this presentation and approval occurred.

For the Jumpstart Biennium, applicants will have through February 28th, 2024 to submit these board minutes; however, the review of applications will not be complete until the board minutes are received.

## Meaningful Reporting

### Quarterly Reporting

Reporting will be completed through a quarterly report submission, where grantees will detail their spending on the activities in their plan. This reporting will be submitted via Smartsheet, and will align with the Integrated Quarterly report to the maximum extent possible. Detailed guidance for this quarterly report will be released at a later date; however, grantees should be prepared to include the expenses for each budgeted activity.



For the Jumpstart Biennium, the quarterly reports are due on the following dates:

Due Date	Reporting Period	Included in the Report
<b>April 30, 2024</b>	Quarter 2 & Quarter 3 (October 1, 2023 – March 30, 2024)	Expenditure Report
<b>November 30, 2024</b>	Quarter 4 (April 1, 2024 – September 30, 2024)	Expenditure Report  AND  Annual Report, inclusive of an inventory of literacy assessments and curricula, and the participation rates in extended learning programs, high-dosage tutoring, and professional development and/or coaching
<b>October 31, 2024</b>	Quarter 1 (July 1, 2024 – September 30, 2024)	Budget Update to actual allocation.
<b>January 31st, 2025</b>	Quarter 1 & Quarter 2 (July 1, 2024 – December 31, 2024)	Expenditure Report
<b>April 30, 2025</b>	Quarter 3 (January 1, 2025 – March 30, 2025)	Expenditure Report
<b>November 30, 2025</b>	Quarter 4 (April 1, 2025 – September 30, 2025)	Expenditure Report  AND  Annual Report, inclusive of an inventory of literacy assessments and curricula, and the participation rates in extended learning programs, high-dosage tutoring, and professional development and/or coaching



## Annual Reporting

Grantees are required to submit an annual report. As with the quarterly report, the annual report will be submitted via Smartsheet, and will align with the Integrated Annual Report to the maximum extent possible.<sup>13</sup> The annual report will include:

- The grantee’s progress toward achieving the goals established in their Early Literacy Success Plan<sup>14</sup>;
- An inventory of literacy assessments, tools, curricula and digital resources used by the grantee;
  - Evidence that the literacy assessments, tools, curricula, and digital resources in the inventory are used with fidelity to research-aligned literacy strategies;
  - Evidence that teachers and administrators are provided with professional development for using and implementing (with fidelity and research-aligned literacy strategies) the literacy assessments, tools, curricula, and digital resources in the inventory;
- The number and percentage of teachers for early elementary grades receiving professional development and coaching *disaggregated by grade level*;
- The number and percentage of students participating in early literacy extended learning programs and their outcomes disaggregated by student group and by grade level;
- The number and percentage of students participating in high-dosage tutoring and their outcomes disaggregated by student group and by grade level; and
- The curricula being used by the grantee.

The annual report offers a chance to review and reflect on the whole of what has been learned and any impact. It is also an opportunity to share updates with students, parents, and community.

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<sup>13</sup> The Oregon Department of Education plans to have grantees use the same Integrated Reporting Dashboard from the start of this initiative.

<sup>14</sup> Waived for the Jumpstart Biennium (2023–2025).



## Prioritization

As permanent rules are developed with the State Board of Education, the statute says, “to the greatest extent practicable, prioritize schools with the lowest rates of proficiency in literacy and assist in the operational alignment of grant programs and improvement strategies administered by the Department of Education.” It also calls for aligning implementation with improvement strategies developed under the Integrated Guidance, including the SIA and continuous improvement planning.

Applicants are encouraged to consider this focus in determining how to utilize their funds in the Jumpstart Biennium with awareness of more detailed guidance likely to follow permanent rulemaking over the remainder of this school year.





## Part II: Planning & Applying for the Jumpstart Biennium 23–25

### Detailed Application Planning Instructions

This section provides instructions for completing each section of the Application (within Smartsheet) and the [Application Planning Template](#). It is intended to be used while either is being completed.

Each section below corresponds to a question in the Application and includes, where applicable, some or all of the following elements:

- **Application Item(s)** corresponding to that section.
- **Evaluation Criteria** that will be used to evaluate the responses to the item.
- **Reporting requirements** from the bill so applicants will be able plan for and anticipate what will be required to report.
- **Notes** highlighting important information for decision-making related to that item, including exceptions.
- **Recommendations** for how to plan for each element of the grant activities and requirements.
- **Definitions and helpful terms** to provide clarity of what is required for each item.



## 1. Program Review

Item	Description
<b>Application Items</b>	Complete questions 1–8 for the <a href="#">Program Review Tool</a> .  (Reflection questions in Appendix A of the tool, “Readiness for Implementation”, are optional.)
<b>Evaluation Criteria</b>	Program review includes a reflection for each section with evidence of clear reflection and connection to indicators.

The Early Literacy Success School District Grant requires a review of the early literacy program, including the English Language Arts (ELA) curricula used in elementary schools of the applicant, using criteria established by the Oregon Department of Education.

“Early literacy program” should be considered as the entirety of the curriculum, assessments, instructional materials, practices, systems, staffing, and structures in place to support comprehensive early literacy across the district. A review of a district’s early literacy curriculum is captured in the Inventory section of the application. However, the curriculum should be taken into consideration when conducting the program review.

The Program Review Tool provides the criteria by which applicants must review their early literacy program. This tool articulates indicators of a research-aligned and culturally responsive literacy program and readiness for implementation based on each section of [Oregon’s Early Literacy Framework](#) and the Early Literacy Playbook. The [Program Review Tool](#) is developed for applicants to help them think deeply into the design of their efforts and should be completed before the [Application Planning Template](#), Application, or [Literacy Inventory and Budget](#).

Applicants need to review the entirety of the early literacy program using the indicators provided in the tool, which are derived from Oregon’s Early Literacy Framework. The Program Review Tool is designed not as a quantitative measure, but a holistic reflection guide related to each section of the Framework. Applicants have discretion in determining how they conduct their program review.



This portion of the application requires a short (up to 250 word) response related to each of eight sections of the program review tool. The questions in the appendix of the Program Review Tool are aligned with the Early Literacy Playbook and are optional, but encouraged.

## 2. Professional Development and Coaching

Item	Description
<b>Application Item</b>	<p>Describe how you will provide professional development and coaching in research-aligned literacy strategies to teachers and administrators to improve early literacy instruction. Include how you will provide professional development to teachers and administrators on using and implementing literacy assessments, tools, curricula, and digital resources with fidelity to research-aligned literacy strategies.</p> <p>If you are not yet able to implement professional development and coaching, you must submit a rationale and describe how you plan to do so in the future.</p>
<b>Evaluation Criteria</b>	<p>The description of how the applicant will provide professional development and coaching in research-aligned strategies includes:</p> <ul style="list-style-type: none"> <li>• the research-aligned literacy strategies that the professional development and coaching will focus on (required);</li> <li>• the target audience (including roles) for the professional development and coaching (required); and</li> <li>• the literacy assessments, tools, curricula or digital resource(s) the professional development will focus on (as applicable).</li> </ul> <p>If the applicant is not yet able to implement professional development and coaching, applicants have submitted a rationale and description of how they plan to do so in the future.</p>
<b>Annual Reporting Requirement<sup>15</sup> (November 30th, 2024)</b>	<ul style="list-style-type: none"> <li>• Evidence that teachers and administrators are provided with professional development plans for using and implementing, with fidelity to research-aligned literacy strategies, the literacy assessments, tools, curricula, and digital resources in the inventory.</li> <li>• The number and percentage of teachers for early elementary grades receiving professional development and coaching disaggregated by grade level.</li> </ul>

<sup>15</sup> See Part 1: Meaningful Reporting section for additional detail.



**Note:** One of the grant application requirements is that applicants must submit a plan to provide and ultimately report on professional development and coaching. If applicants are not yet able to implement professional development and coaching, applicants must submit a rationale and describe how they plan to do so in the future.

**Note:** The information shared in planning and reporting is about an applicant’s overall literacy implementation and is not narrowed just to this new fund source. Applicants may use other fund sources to operationalize this activity and will report on the status of implementation regardless of fund source.

Districts will report on professional development and coaching as a single reporting category for the following purposes:

- implementing curriculum and other instructional materials with fidelity (reporting for both teachers and admin)
- research-aligned literacy strategies (reporting for teachers only)

For additional information, see Part I: Allowable Uses of Funding (pg. 8)

**Note:** While professional development specific to supporting fidelity to curriculum and other instructional materials is not a requirement for application, it is a required reporting category.

Recommendation: Use the Oregon’s Early Literacy Framework and the definitions provided in Appendix A: Definitions and Helpful Terms when determining whether or not professional development and coaching meet the research-aligned standard.

Recommendation: When designing professional development and coaching consider including activities that:

- Are “sustained (not stand-alone, one-day, or short-term workshops), intensive, collaborative, job-embedded, data-driven, and classroom-focused.”<sup>16</sup>
- Are aligned to high-quality instructional materials.
- Are leveraged to impact core instruction for all students and when applicable, to support high quality tutoring and intervention/acceleration instruction.
- Include specific outcomes on what educators will know and be able to do as a result of the learning.
- Include measures of effectiveness to determine if the learning was effective.
- Are planned to consider teacher time.

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<sup>16</sup> As described in the [Every Student Succeeds Act](#).



Recommendation: When planning professional development and coaching, consider the following questions:

- What is the need the professional development or coaching is trying to address? Why that area?
- What did our program review illuminate?
- What research-aligned strategies are our focus?
- What educator knowledge, skills, and practice are we hoping to support? How will that directly impact students' literacy learning and well-being?
- What would we expect to see change as a result of this professional development and coaching? What in Oregon's Early Literacy Framework can we identify that coaching and professional development will lead to?
- What conditions for adult learning must we ensure so that professional development and coaching are successful?
- How will we know if the professional development and coaching was effective?
- Who will provide oversight for the implementation, monitoring and evaluation of the PD and coaching?

### 3. Extended Learning Programs

Item	Description
<b>Application Item</b>	<p>Describe how you will provide extended learning programs that use research-aligned literacy strategies and that are made available by licensed teachers or by qualified tutors.</p> <p>If you are not yet able to implement extended learning programs, you must submit a rationale and describe how you plan to do so in the future.</p>
<b>Evaluation Criteria</b>	<p>The description of how the applicant will provide extended learning programs that use research-aligned literacy strategies and that are made available by licensed teachers or by qualified tutors includes both:</p> <ul style="list-style-type: none"> <li>• a description of how literacy is included as the focus of the program, and</li> <li>• who will provide the extended learning and their qualifications</li> <li>•</li> </ul>



	If the applicant is not yet able to implement extended learning programs, applicants have submitted a rationale and description of how they plan to do so in the future.
<b>Annual Reporting Requirement<sup>17</sup> (November 30th, 2024)</b>	The number and percentage of students participating in early literacy extended learning programs, at the school and the school district level, with their outcomes disaggregated by student group and grade level.

**Note:** One of the grant application requirements is that applicants must submit a plan to provide and ultimately report on extended learning programs. If applicants are not yet able to implement extended learning programs, applicants must submit a rationale and describe how they plan to do so in the future.

**Note:** The information shared in planning and reporting is about an applicant’s overall literacy implementation and is not narrowed just to this new fund source. Applicants may use other fund sources to operationalize this activity and will report on the status of implementation regardless of fund source.

For additional information, see Part I: Allowable Uses of Funding (pg. 8)

The scope and further clarifications of extended learning programs will be addressed through the permanent rulemaking process for future applications. Currently, extended programs need not be limited to summer programming as described above, but must still meet the research-aligned, grade level, and qualified educator quality standards.

Applicants should also consider equity implications of extended learning programs, such as access, scheduling, and well-rounded summer and after-school opportunities. For more information on high-quality afterschool and summer programs, please visit the Oregon Department of Education’s [Summer Learning Webpage](#).

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<sup>17</sup> See Part 1: Meaningful Reporting.



## 4. High-Dosage Tutoring

Item	Description
<b>Application Item</b>	<p>Describe how you will provide high-dosage tutoring that integrates reading and writing and that is delivered by a qualified tutor using developmentally appropriate practices.</p> <p>If you are not yet able to implement high-dosage tutoring, you must submit a rationale and describe how you plan to do so in the future.</p>
<b>Evaluation Criteria</b>	<p>The description of how the applicant will provide high-dosage tutoring that integrates reading and writing and that is delivered by a qualified tutor using developmentally appropriate practices includes all four details:</p> <ul style="list-style-type: none"> <li>● the domains of language<sup>18</sup> addressed (at least reading and writing);</li> <li>● who will provide the high dosage tutoring and their qualifications;</li> <li>● duration and frequency; and</li> <li>● how the tutoring is developmentally appropriate, including how it is responsive to student need.</li> </ul> <p>If the applicant is not yet able to implement high-dosage tutoring, applicants have submitted a rationale and a description of how they plan to do so in the future.</p>
<b>Annual Reporting Requirement<sup>19</sup> (November 30th, 2024)</b>	<p>The number and percentage of students participating in high-dosage tutoring, with their outcomes disaggregated by student group and grade level.</p>

**Note:** One of the grant application requirements is that applicants must submit a plan to provide and ultimately report on high-dosage tutoring. If applicants are not yet able to implement high-dosage tutoring, applicants must submit a rationale and describe how they will plan to do so in the future.

<sup>18</sup> Reading, Writing, Speaking, and Listening.

<sup>19</sup> See Part 1: Meaningful Reporting.



**Note:** The information shared in planning and reporting is about an applicant’s overall literacy implementation and is not narrowed just to this new fund source. Applicants may use other fund sources to operationalize this activity and will report on the status of implementation regardless of fund source.

For additional information, see Part I: Allowable Uses of Funding (pg. 8)

The scope (such as a required group size) and other details of these definitions will be further clarified through the permanent rulemaking process for future implementation.

Recommendation: Effective and impactful high-dosage tutoring programs:<sup>20</sup>

- have tutors that are well-trained and supported, or are teachers, retired teachers, or teaching candidates;
- have tutors that have time for planning and collaboration with classroom teachers;
- tutors use high-quality instructional materials in high-frequency sessions (offer tutoring at least three times per week, for 30 minutes per session) with three or fewer students in each session;
- align with an evidence-based curriculum;
- occur at school during the school day whenever possible;
- include instruction that is supplemental and focused on acceleration, not remediation;
- are built into the school day and engages teachers and caregivers; and
- use data to inform and individualize instruction and continuously improve program design.

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<sup>20</sup> <https://www.edworkingpapers.com/ai20-267>



## 5. Student Growth Assessment

Item	Description
<b>Application Item(s)</b>	If you do not have a current student growth assessment that allows for data to be disaggregated by student groups who have historically experienced academic disparities, describe how you will provide one. (It must allow for data to be disaggregated by student groups that have historically experienced academic disparities.)
<b>Evaluation Criteria</b>	<p>A student growth assessment for literacy is submitted in the Inventory.</p> <p>If not, a description is provided of how a student growth assessment will be obtained and administered</p> <p><b>Note:</b> The “disaggregation of data” requirement for this application requirement is evaluated through an assurance.</p>

The grant application requires a student growth assessment for all students for which data is disaggregated by student groups that have historically experienced academic disparities. If a district does not yet have a student growth assessment for literacy or uses one that has not yet been disaggregated as described above, include a description of the plans for obtaining a new student growth assessment.

Applicants need not submit student data for the application, only information about the student growth assessment in use for the purposes of measuring student growth in literacy.

Information about the student growth assessment is collected in two places: as a description in the Application Planning Template (and Application), if applicable, and in the Inventory tab of the Literacy Inventory and Budget. It is included with other inventory items (see Part II: Inventory) and is indicated with a “Yes” entry under the “Is this your student growth assessment?” column.



## 6. Communication Plan

Item	Description
<b>Application Items</b>	What communication strategies will be used to communicate with: <ul style="list-style-type: none"> <li>● other school districts?</li> <li>● elementary schools in the school district?</li> <li>● families of the school district?</li> <li>● members of the school district community?</li> </ul>
<b>Evaluation Criteria</b>	At least one communication strategy for each community group is provided: <ul style="list-style-type: none"> <li>● School districts;</li> <li>● Elementary schools of the school district;</li> <li>● Families of the school district; and</li> <li>● Members of the school district community</li> </ul>

Applicants need only select the communication strategies they plan to use as they communicate and execute the early literacy plan. The communication efforts themselves need not be completed before the application is submitted.

**Note:** Every family deserves to know their district’s approach and early literacy strategy. The communication plan described above is a minimum requirement for this application related to, but distinct from, deep community engagement. As applicants engage communities for Integrated Guidance, they should include the development and continuous improvement of their early literacy approach and strategy into those efforts throughout the Jumpstart Biennium.



## 7. Matching Funds

Item	Description
<b>Application Item</b>	Name the fund source(s) for the 25% match. If applicable, is any part of your match going towards 4th and/or 5th grade expenditures?
<b>Evaluation Criteria</b>	At least one source to match 25% of the total allocation is named and at least one category is selected for its use. If applicable, a fund source is named for the 4th and/or 5th grade match.

Applicants are not limited to spending matching funds on the allowable uses described above, though are highly encouraged to do so. Matching funds for the Jumpstart Biennium, pending permanent rule making, can be used broadly to support literacy across grades pre-kindergarten–fifth grade.

For this part of the application, name the fund source(s) for the 25% match. If applicable, name the fund source(s) for the matching 4th and/or 5th grade expenditures.

Also indicate which category best describes how the match funds will be spent.

**Note:** For districts with an ADMw <50, the 25% match will be waived pending temporary rule adoption by the State Board of Education. This includes additional matches for 4th or 5th grade expenditures.



## 8. Assurances

Item	Description
<b>Evaluation Criteria</b>	The applicant has verified all of the required assurances.

### Early Literacy Success School District Grant – Specific Assurances

*By checking the following boxes, the applicant agrees that they:*

- Have reviewed their early literacy programs to identify areas of alignment with Oregon’s Early Literacy Framework: A Strong Foundation for Readers and Writers (K–5) and the applicant’s work will align with the definitions included in the [Early Literacy Success Initiative](#)\*
- Have reviewed the reporting requirements in Section 6 (2) of the [Early Literacy Success Initiative](#) and included in the Early Literacy Success School District Grants Application Guidance. \*
- Use literacy assessments, tools, curricula and digital resources that are reflected in the inventory and that they are based on research–aligned literacy strategies and are formative, diagnostic and culturally responsive; and if not, have indicated planned changes to ensure this requirement is met.\*
- Will provide professional development and coaching in research–aligned literacy strategies to teachers and administrators in early elementary grades to improve early literacy instruction; and if not, have provided a rationale and description of how they will plan to do so in the future.\*
- Will provide extended learning programs that use research–aligned literacy strategies to students in early elementary grades by licensed teachers or by qualified tutors; and if not, have provided a rationale and description of how they will plan to do so in the future.\*
- Will provide high–dosage tutoring to students in early elementary grades that integrates reading and writing and that is delivered by a qualified tutor using developmentally appropriate practices; and if not, have provided a rationale and description of how they will plan to do so in the future.\*
- Have a student growth assessment (or have described that they will obtain one) that produces data that can be disaggregated by student groups who have historically experienced academic disparities (as defined in the [Early Literacy Success Initiative](#)).\*



## Overarching Assurances

- By checking this box, the applicant agrees to comply with all applicable state and federal civil rights laws, to the effect that no person shall be excluded from participation in, be denied benefits of, or otherwise be subject to discrimination under any program or activity on the basis of race, color, national origin, sex, sexual orientation, marital status, gender identity, religion, age, or disability.\*

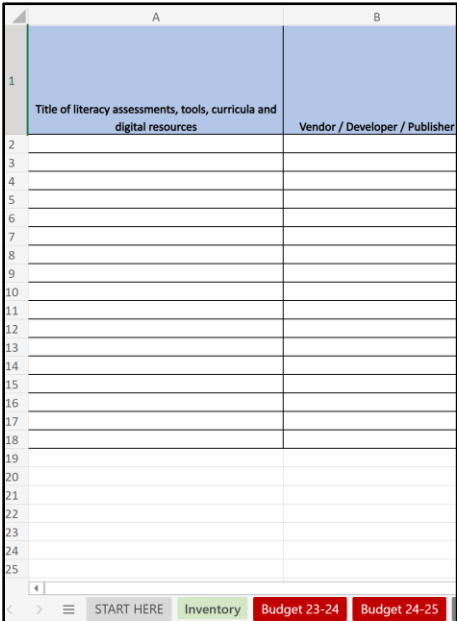


## Detailed Literacy Inventory and Budget Instructions

This section provides instructions for completing each section of the [Literacy Inventory and Budget](#). It is intended to be used while the Literacy Inventory and Budget is being completed.

Each section below corresponds to a tab on the Literacy Inventory and Budget and includes, where applicable, some or all of the following elements:

- **Application Item(s)** corresponding to that section.
- **Evaluation Criteria** that will be used to evaluate the responses to the item.
- **Reporting requirements** from the bill so applicants will be able plan for and anticipate what will be required to report.
- **Notes** highlighting important information for decision-making related to that item, including exceptions.
- Recommendations for how to plan for each element of the grant activities and requirements.
- Definitions and helpful terms to provide clarity of what is required for each item.



	A	B
1	Title of literacy assessments, tools, curricula and digital resources	Vendor / Developer / Publisher
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## 9. Inventory

Item	Description
<b>Application Item</b>	Complete the Inventory (table).
<b>Evaluation Criteria</b>	<p>Application includes a core (or basal)<sup>21</sup> ELA curriculum for kindergarten–3rd grade identified in the Inventory. If applicable, inventory includes curriculum for pre-kindergarten.</p> <p>Application includes a core (or basal) ELA curriculum for 4th grade and/or and/or 5th grade identified in the Inventory, if funds are budgeted for 4th/5th grade.</p> <p>For districts, only: The adoption date of the core curriculum is on or after February 2020. If no, there is a description explaining anticipated changes and anticipated date of new adoption.</p> <p>For charters, only: A review or evaluation process of the core curriculum using the state criteria adopted in 2020 is indicated in the Inventory. If no, description is provided explaining when and how a review using the criteria will occur or intent to use curriculum from the SBE list.</p> <p>For any material types other than core/basal curriculum, all applicable information is complete (Title, Vendor, Type, Grades, Date of Adoption, Print or Digital)</p> <p>If applicable, there is a description of any planned changes in order to ensure an item in the inventory will meet the research-aligned criteria in the future.</p> <p>A student growth assessment for literacy is submitted in the Inventory. If not, a description is provided of how a student growth assessment will be obtained and administered.</p> <p><b>Note:</b> The “disaggregation of data” requirement for this application requirement is evaluated through an assurance.</p>

<sup>21</sup> See Appendix A for the definition of these important terms.



Item	Description
<b>Annual Reporting Requirement<sup>22</sup> (November 30th, 2024)</b>	<ul style="list-style-type: none"> <li>• Inventory of literacy assessments, tools, curricula and digital resources used by the school district or charter to support literacy.</li> <li>• Evidence that the literacy assessments, tools, curricula, and digital resources are used with fidelity to research-aligned literacy strategies.</li> <li>• Curricula being used by the school district or public charter school.</li> </ul>

The application requires an accurate, up-to-date inventory of all literacy assessments, tools, curricula and digital resources used to support literacy in early elementary grades.

Applicants must ensure that the literacy assessments, tools, curricula and digital resources of the inventory are based on research-aligned literacy strategies, culturally responsive and, where applicable, formative and diagnostic. If, however, applicants identify they are using literacy assessments, tools, curricula, and/or digital resources that do not meet this standard, these should still be submitted. The applicant must provide a description of any planned changes to ensure that the standard is met in the future in the last column of the Inventory.

**Note:** The Inventory includes only materials and curriculum that are currently being used by the applicant. Future or planned purchases, or monies being budgeted for that allowable use, should be entered in the Budget tab, and described in the Notes column on the Inventory tab.

## Research-Aligned Materials

The following recommendations support applicants in determining whether or not instructional materials required for the inventory meet the research-aligned standard described in the Definitions & Helpful Terms (pg.7) for the purposes of this grant, only. This determination will be further clarified through the permanent rulemaking process for future applications.

- **Oregon’s State Board Adopted K-2 and K-3 ELA Adoption Criteria** are required for the adoption of core or basal curriculum and can be used as a tool to evaluate other instructional materials. Applicants should use the criteria adopted by the State Board of Education most recently in 2020.

<sup>22</sup> See Part 1: Meaningful Reporting.



- **Oregon’s Early Literacy Framework** includes additional information to inform evaluation and use of assessments, tools, and other instructional materials.

## Grades

Applicants must include materials used for:

- Grades kindergarten–3rd grade; and
- Pre-kindergarten, 4th grade, and 5th grade, if applicable.

Applicants must include materials in the inventory for grades kindergarten through 3rd grade even if grant funds are not budgeted for those grade levels. For example, if a district is putting grant funds towards 3rd grade only, they must still submit curricula and materials for kindergarten, 1st grade, 2nd grade, 3rd grade, and pre-kindergarten (if applicable).

## Scope of Inventory

The following definitions are recommendations to support applicants in determining the scope of what to include in the inventory for the purposes of this grant, only. These definitions will be further clarified through the permanent rulemaking process for future applications.

- **Literacy curriculum** – Any instructional materials used in practice and/or formally adopted by the local school board for core or basal instruction.
- **Core or basal instructional materials** – Instructional materials that are intended to be a substantial and ongoing component of literacy instruction. These might include adaptive or personalized programs, digital, or print materials. Applicants are required to adopt basal instructional materials in order to teach the academic content standards for English Language Arts.
- **Literacy Tools and Digital Resources** – Any supplemental materials, devices, programs, or curriculum used as either core or supplemental to students' literacy instruction. This includes intervention, acceleration, tutoring, or supplemental materials that are used to a substantial degree across elementary schools in student literacy instruction and in addition to the core curriculum.
- **Literacy Assessments** – Summative, benchmark, diagnostic, interim assessments, and purchased systems of formative assessment practices used to measure student learning across any or all of the four domains of literacy. For definitions, see pages 26–35 of [The Right Assessment for the Right Purpose](#).



## Date of Adoption

- For core or basal curriculum, “Date of Adoption” is the date on which the materials were adopted by the local school board.
- For all other materials, tools, or assessments, “Date of Adoption” is the date on which the district began its use.

## Plans for Updating

If the content in the applicant's inventory does not yet meet the “research-aligned” standard, complete the prompt in the last column of the inventor (“Please describe any planned changes or updates for materials that are not research-aligned.”)

**Note:** If the adoption date for an applicant’s core or basal curriculum is before 2020, or if an independent adoption did not use the State Board of Education Adoption Criteria for ELA, a description of plans for updating is required in the last column of the Inventory.

## 10. Budget 23-24/24-25

Item	Description
<b>Evaluation Criteria</b>	<p>Two years of budget tabs are complete.</p> <p>No more than 20% of the 23-24 budget is allocated to 4th and/or 5th grade, if applicable.</p> <p>No more than 10% of the 24-25 budget is allocated to 4th and/or 5th grade, if applicable.</p> <p>Proposed investment descriptions align with the associated allowable use category selected.</p> <p>Any FTE type submitted is one of:</p> <ul style="list-style-type: none"> <li>- Literacy specialist</li> <li>- Interventionist</li> <li>- Coach</li> </ul> <p>No more than 5% of total allocation is budgeted for administrative (or</p>



Item	Description
	<p>indirect) costs.</p> <p>For each budget tab, the total budgeted amount does not exceed the total allocation.</p> <p>Each activity on both budget tabs:</p> <ul style="list-style-type: none"> <li>- Connects to an allowable use</li> <li>- Has a description of the Proposed Investment</li> <li>- Specifies:               <ul style="list-style-type: none"> <li>- FTE, if applicable</li> <li>- FTE Type, if applicable</li> <li>- Appropriate allowable use code</li> <li>- 4th/5th Expenditure, if applicable</li> <li>- A budget amount</li> </ul> </li> </ul> <p>Any proposed changes indicated in the Inventory are reflected in the budget, if applicable.</p> <p>a) This is not applicable if:</p> <ol style="list-style-type: none"> <li>i) The applicant description names a different funding source to address the change</li> <li>ii) There are no proposed changes.</li> </ol>
<b>Quarterly Reporting Requirement<sup>23</sup></b>	Provide actual expenditures and plan changes, as necessary.

The budget tabs are separated into 23–24 and 24–25 as these grants are annual grants, and it is important to track expenditures discreetly between each year of the biennium. Both tabs will need to be completed as part of this application.

These budget tabs are designed for applicants to articulate specific investments using their Early Literacy Success School District Grant funds to support the overall aims of their early literacy plan.

The top three rows (indicated in gray) are automatically populated from other sections, or sources of information; these include the following cells:

- Total Allocation
- Total Budgeted Amounts
- Unbudgeted

<sup>23</sup> See Part 1: Meaningful Reporting.



While completing the expenditures, review these three rows and their autocalculations as a planning support.

All expenditures must be aligned to the allowable uses in Section 3 of the [Early Literacy Success Initiative](#).

Applicants are limited on how much of their allocation they can use to support 4th and 5th grade learning. Only 20% of a district’s overall allocation can be spent on supporting 4th and 5th grades in the first year, and only 10% in the second year.

The following table offers a visual of the limitations for 4th and 5th grade expenditures by year:

School Year	Limitation
2023–2024 <sup>24</sup>	20% Limitation
2024–2025 <sup>25</sup>	10% Limitation

Application Item	Grant Allowable Use Category
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From the drop-down menu, select the Grant Allowable Use Category that most closely aligns with the investment. Your options are:

- Professional Development & Coaching
- Extended Learning Programs
- High-Dosage Tutoring
- Purchasing Curricula & Materials
- Hiring

Three allowable uses (professional development & coaching, high-dosage tutoring, and extended learning) were described as narratives in previous application items. The remaining two allowable uses (purchasing curricula & materials and hiring) are included in the budget and do not require a narrative description.

<sup>24</sup> Applicants are not *required* to spend funds on 4th and 5th grade literacy.

<sup>25</sup> Applicants are not *required* to spend funds on 4th and 5th grade literacy.



## Purchasing Curricula & Materials

Grant funds may be used for the adoption of curricula that uses research-aligned literacy strategies and the implementation of that curricula. Funding for this allowable use may be used to:

- Purchase curricula and materials that are culturally relevant
- Provide professional development and time for teachers and administrators to attend training related to the curricula (described further in section professional development and coaching)

The scope (such as the scope of “materials”) and other details of these definitions will be further clarified through the permanent rulemaking process for future implementation. The purchase of a student growth assessment is an allowable use (see Part II: Student Growth Assessment).

The following recommendations support applicants in determining whether or not instructional materials required for the inventory meet the research-aligned standard described in the Definitions & Helpful Terms (pg.7) for the purposes of this grant, only. This determination will be further clarified through the permanent rulemaking process for future applications.

- **Oregon’s State Board approved [Adoption Criteria for ELA Instructional Materials](#)** offer a strong framework for applicants to evaluate instructional materials as being research-aligned and culturally responsive. Additional resources on high-quality instructional materials can be found on Oregon Department of Education’s [High-Quality Instructional Materials](#) webpage.
- **Oregon’s Early Literacy Framework** includes additional information to inform evaluation and use of assessments, tools, and other instructional materials.

## Hiring: Employment of Literacy Specialists, Interventionists, and Coaches

Funds for the employment of literacy specialists, coaches or interventionists are an allowable use of these grant funds. The scope (such as the definition of each of the roles named above) and other details of this allowable use will be further clarified through the permanent rulemaking process for future implementation.

Application Item	Proposed Investments
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Provide a brief description of the proposed investment. For example, “Provide PD to K-1 teachers on new writing curriculum,” or “Hire Literacy Coaches.” Applicants should consider how literacy specialists, coaches, and interventionists support the implementation of the other allowable uses and how their roles will have a direct impact on student learning and teacher practice.



<b>Application Item</b>	FTE & FTE Type
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If there is FTE associated with the investment, indicate how much FTE and the Type of FTE from the dropdown that most closely aligns to the investment.

<b>Application Item</b>	Allowable Use Code
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Select the more granular allowable use code connected to the investment. Options for Allowable Use Code follow:

Allowable Use Code	Description
<b>CRCM</b>	Purchase Culturally Relevant Curricula & Materials
<b>CTPD</b>	Curricula Training & Professional Development
<b>PDC</b>	Professional Development and Coaching
<b>1:1HDT</b>	1:1 High Dosage Tutoring
<b>SGHDT</b>	Small Group High Dosage Tutoring
<b>ELPH</b>	Extended Learning Programs - Home-based Summer Reading
<b>ELPSS</b>	Extended Learning Programs - Intensive Summer School
<b>ELPO</b>	Extended Learning Programs - Other

<b>Application Item</b>	Object Code
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Select the appropriate object code connected to the investment.

<b>Application Item</b>	4th or 5th Grade Expenditure
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If applicants are choosing to invest in 4th or 5th grade, add those expenditures as individual investments so the Oregon Department of Education can accurately calculate expenditures to ensure adherence to the 20% limitation for 2023-24 and 10% for 2024-25.



<b>Application Item</b>	Literacy Budget
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Add the dollar amount that is budgeted from the Early Literacy Success School District Grant for the specific investment. When the budget is finished, the sum of this column should equal the applicant's total allocation for each year.

<b>Application Item</b>	Employment of Literacy Specialists, Interventionists, and Coaches
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Funds for the employment of literacy specialists, coaches or interventionists are an allowable use of funds. The scope (such as the definition of each of the roles named above) and other details of this allowable use will be further clarified through the permanent rulemaking process for future implementation.

Applicants should consider how literacy specialists, coaches, and interventionists support the implementation of the other allowable uses and how their roles will have a direct impact on student learning and teacher practice.



# Appendix A: Definitions and Helpful Terms

## Definitions

The following definitions come from the [Early Literacy Success Initiative](#):

- “Early elementary grades” means any grade from pre-kindergarten through grade three.
- “Elementary school” means a school of a school district, or a public charter school, with students in early elementary grades.
- “Extended learning programs” are programs that use research-aligned literacy strategies and that are made available to students in early elementary grades by licensed teachers or by qualified tutors. Extended learning programs may include, but are not limited to:
  - Home-based summer reading activities for students who need additional support and enrichment; and
  - An intensive summer school program for students who need the most additional support and who receive at least 60 hours of direct literacy instruction by an instructional assistant or a licensed teacher trained in research-aligned literacy strategies.
- “High-dosage tutoring” means one-on-one tutoring or tutoring in small groups, as determined by rule of the State Board of Education, that:
  - Is provided in addition to daily instruction;
  - Is provided two or more times each week over at least a 10-week period; and
  - Uses a research-aligned tutoring model that is administered in a culturally responsive manner and that is combined with the training necessary for tutors to implement the model effectively.
- “Pre-kindergarten” means a preschool or pre-kindergarten program that is:
  - Provided by a school district or public charter school; or
  - Delivered in partnership between a school district and another organization.
- “Preschool” means a high-quality program that serves children at least three years of age but not older than five years of age.



- “Public charter school” means a public charter school that: (a) Is established under ORS chapter 338; and (b) Is not a virtual public charter school, as defined in ORS 338.005.
- “Qualified tutor” means an individual who is trained to implement a program providing high-dosage tutoring.
- “Research-aligned literacy strategies” means strategies that:
  - Are literacy focused;
  - Are culturally responsive and relevant to diverse learners; (c) Are based on long-term research derived from the science of reading and writing; and (d) Apply instructional practices that are developmentally appropriate and specifically designed for students with disabilities and students who are English language learners.
- “Science of reading and writing” means:
  - The convergence of findings from research on reading and writing processes, development and instruction; and
  - The teaching of phonemic awareness, phonics, fluency, vocabulary and comprehension through explicit and systematic instruction that can be differentiated to meet the needs of individual learners through developmentally appropriate practices.
- “Student groups that have historically experienced academic disparities” means:
  - Economically disadvantaged students, as determined under rules adopted by the State Board of Education;
  - Students from racial or ethnic groups that have historically experienced academic disparities, as determined under rules adopted by the State Board of Education;
  - Students with disabilities;
  - Students who are English language learners;
  - Students who are foster children, as defined in ORS 30.297; (f) Students who are homeless, as determined under rules adopted by the State Board of Education;
  - Students who attend an elementary school that:
    - Is identified for comprehensive support and improvement or for targeted support and improvement under the federal Every Student Succeeds Act (P.L. 114-95, 129 Stat. 1802); or
    - Qualifies for assistance under Title I of the federal Elementary and Secondary Education Act of 1965; or



- Any other student groups that have historically experienced academic disparities, as determined under rules adopted by the State Board of Education by rule.

## Helpful Terms

Additional terms developed to support applicants. Note that these and other definitions will be further clarified through the permanent rulemaking process for future implementation.

- “Coaching” – Where this law names “coaching” it should be understood as an array of practices that support teachers through regular feedback and practice, formally or informally, to support implementation of research-aligned literacy practices and student learning.
- “Core or basal instructional materials” are instructional materials that are intended to be a substantial and ongoing component of literacy instruction. These might include adaptive or personalized programs, digital, or print materials. Applicants are required to adopt basal instructional materials in order to teach the academic content standards for English Language Arts.
- “Developmentally appropriate”<sup>26</sup> can be thought of as “an approach to teaching grounded in the research of how children develop and learn and in what is known about effective early education ... developmentally appropriate practice involves teachers meeting young children where they are (by stage of development), both as individuals and as part of a group.” The National Association for the Education of Young Children also identifies three core considerations of developmentally appropriate practice:
  - knowledge of child development and learning,
  - knowledge of children as individuals, and
  - knowledge of children’s cultures.
- “Early literacy program” should be considered as the entirety of the curriculum, assessments, instructional materials, practices, systems, staffing, and structures in place to support comprehensive early literacy across the district.
- “Literacy Assessments” can be considered summative, benchmark, diagnostic, interim assessments, and purchased systems of formative assessment practices used to measure student learning across any or all of the four domains of literacy. For definitions, see pages 26–35 of [The Right Assessment for the Right Purpose](#).

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<sup>26</sup> [Oregon’s Early Learning & Kindergarten Guidelines](#)



- “Literacy curriculum” can be considered any instructional materials used in practice and/or formally adopted by the local school board for core or basal instruction.
- “Literacy Tools and Digital Resources” can be considered any supplemental materials, devices, programs, or curriculum used as either core or supplemental to students' literacy instruction. This includes intervention, acceleration, tutoring, or supplemental materials that are used to a substantial degree across elementary schools in student literacy instruction and in addition to the core curriculum.
- “Professional development” for this grant can be considered similarly to its definition as articulated in the Oregon Department of Education’s Integrated Guidance: learning opportunities that support educators and administrators in instructional strategies for equity-centered, research-aligned, and culturally responsive literacy instruction that considers the context of each district, may elevate critical topics in system change strategies for early literacy, and support educators in leveraging high-quality, research-aligned instructional materials and curriculum to serve all students.



## Appendix B: Evaluation Criteria

This appendix is intended to be transparent with how applications will be reviewed by the Oregon Department of Education starting in January 2024. Applicants can choose to use this as a form of self-assessment, but it is not required. Multiple reviewers will read and evaluate each application and their attachments.

### Intake Checklist

Required Attachments	Yes	No
1. Board Approval Meeting Minutes		
2. Literacy Inventory and Budget		
3. Amended MOU (for those in an Aligned Program Consortia)		
Completion Check	Yes	No
1. Are all questions on the application answered?		
2. Have all assurances been verified?		

### Program Review

For All Applicants	Meets	Does Not Meet
Program review includes a reflection for each section with evidence of clear reflection and connection to indicators.		



## Descriptions of Professional Development & Coaching, Extended Learning, and High-Dosage Tutoring

For All Applicants	Meets	Does Not Meet
<p>The description of how the applicant will provide professional development and coaching in research-aligned strategies includes:</p> <ul style="list-style-type: none"> <li>the research-aligned literacy strategies that the professional development and coaching will focus on (required);</li> <li>the target audience (including roles) for the professional development and coaching (required); and</li> <li>the literacy assessments, tools, curricula or digital resource(s) the professional development will focus on (as applicable).</li> </ul> <p>If the applicant is not yet able to implement professional development and coaching, applicants have submitted a rationale and description of how they plan to do so in the future.</p>		
<p>The description of how the applicant will provide extended learning programs that use research-aligned literacy strategies and that are made available by licensed teachers or by qualified tutors includes both:</p> <ul style="list-style-type: none"> <li>a description of how literacy is included as the focus of the program, and</li> <li>who will provide the extended learning and their qualifications.</li> </ul> <p>If the applicant is not yet able to implement extended learning programs, applicants have submitted a rationale and description of how they plan to do so in the future.</p>		
<p>The description of how the applicant will provide high-</p>		



For All Applicants	Meets	Does Not Meet
<p>dosage tutoring that integrates reading and writing and that is delivered by a qualified tutor using developmentally appropriate practices includes all four details:</p> <ul style="list-style-type: none"> <li>• the domains of language<sup>27</sup> addressed (at least reading and writing);</li> <li>• who will provide the high dosage tutoring and their qualifications;</li> <li>• duration and frequency; and</li> <li>• how the tutoring is developmentally appropriate, including how it is responsive to student need.</li> </ul> <p>If the applicant is not yet able to implement high-dosage tutoring, applicants have submitted a rationale and a description of how they plan to do so in the future.</p>		

## Student Growth Assessment

For All Applicants	Meets	Does Not Meet
<p>A student growth assessment for literacy is submitted in the Inventory.</p> <p>If not, a description is provided of how a student growth assessment will be obtained and administered</p> <p><b>Note:</b> The “disaggregation of data” requirement for this application requirement is evaluated through an assurance.</p>		

<sup>27</sup> Reading, Writing, Speaking, and Listening.



## Communication Plan

For All Applicants	Meets	Does Not Meet
<p>At least one communication strategy for each community group is provided:</p> <ul style="list-style-type: none"> <li>• School districts;</li> <li>• Elementary schools of the school district;</li> <li>• Families of the school district; and</li> <li>• Members of the school district community</li> </ul>		

## Matching Funds

For All Applicants	Meets	Does Not Meet
<p>At least one source to match 25% of the total allocation is named and at least one category is selected for its use.</p> <p>If applicable, a fund source is named for the 4th and/or 5th grade match.</p>		

## Inventory & Curriculum Review

For All Applicants	Meets	Does Not Meet
<p>Application includes a core (or basal) ELA curriculum for grades K-3 identified in the Inventory.</p> <p>If applicable, inventory includes curriculum for pre-kindergarten.</p>		
<p>Application includes a core (or basal) ELA curriculum for grades 4 and/or 5 identified in the Inventory, if funds are budgeted for 4th/5th grade.</p>		
<p>For districts, only: The adoption date of the core curriculum is on or after February 2020.</p> <p>If no, there is a description explaining anticipated changes and anticipated date of new adoption</p>		



For All Applicants	Meets	Does Not Meet
<p>For charters, only: A review or evaluation process of the core curriculum using the state criteria adopted in 2020 is indicated in the Inventory. If no, description is provided explaining when and how a review using the criteria will occur or intent to use curriculum from the SBE list.</p>		
<p>For any material types other than core/basal curriculum, all applicable information is complete (Title, Vendor, Type, Grades, Date of Adoption, Print or Digital)</p>		
<p>If applicable, there is a description of any planned changes in order to ensure an item in the inventory will meet the research-aligned criteria in the future.</p>		
<p>A student growth assessment for literacy is submitted in the Inventory. If not, a description is provided of how a student growth assessment will be obtained and administered <b>Note:</b> The “disaggregation of data” requirement for this application requirement is evaluated through an assurance.</p>		

## Budget (Including Proposed Hiring and/or Content)

For All Applicants	Meets	Does Not Meet
Two years of budget tabs are complete.		
No more than 20% of the 23-24 budget is allocated to 4th and/or 5th grade, if applicable.		
No more than 10% of the 24-25 budget is allocated to 4th and/or 5th grade, if applicable.		
Proposed investment descriptions align with the		



For All Applicants	Meets	Does Not Meet
associated allowable use category selected.		
No more than 5% of total allocation is budgeted for administrative (or indirect) costs.		
For each budget tab, the total budgeted amount does not exceed the total allocation.		
Each activity on both budget tabs: <ul style="list-style-type: none"> <li>- Connects to an allowable use</li> <li>- Has a description of the Proposed Investment</li> <li>- Specifies:               <ul style="list-style-type: none"> <li>- FTE, if applicable</li> <li>- FTE Type, if applicable</li> <li>- Appropriate allowable use code</li> <li>- 4th/5th Expenditure, if applicable</li> <li>- A budget amount</li> </ul> </li> </ul>		
Any proposed changes indicated in the Inventory are reflected in the budget, if applicable. This is not applicable if: <ol style="list-style-type: none"> <li>i) The applicant description names a different funding source to address the change</li> <li>ii) There are no proposed changes.</li> </ol>		





# LETRS Implementation & Impacts in Multnomah County



Prepared by:  
Pacific Research and Evaluation, LLC  
October 2023

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# Executive Summary

In late 2021, Portland Public School District, in partnership with the Multnomah Education Service District (MESD), submitted a proposal to the Oregon Department of Education suggesting the use of GEER-II dollars to fund an independent evaluation of LETRS implementation and outcomes across the five Multnomah County school districts during the 2022-2023 school year. Ultimately, the study would aim to provide information that supports state-level decisions about whether and how to invest in LETRS training statewide.

Over the course of two years, participants from five Multnomah County school districts engaged in the Language Essentials for Teachers of Reading and Spelling (LETRS) professional learning program for early childhood educators, which is focused on early literacy and language foundations. The five districts investing in LETRS training include Portland Public Schools (PPS), Reynolds School District, David Douglas School District (DDSD), Parkrose School District, and Centennial School District. In partnership with the Multnomah Education Service District (MESD), PPS received funding in 2022 to support implementation of LETRS across these five districts, in addition to funds from the Oregon Department of Education for an independent study of LETRS implementation and outcomes. The independent study was completed by Pacific Research and Evaluation (PRE) and included educator surveys, educator focus groups, administrator interviews, and points of contact interviews, as well as an assessment of the impact of LETRS on teacher and student outcomes in the 2022-2023 school year. A summary of the findings is presented below and covers the topic of implementation and context, as well as the five levels of Guskey's model for evaluating professional learning programs: Participants' Reactions (Level 1); Participants' Learning (Level 2); Organizational Support and Change (Level 3); Participants' Use of New Knowledge and Skills (Level 4); and Student Learning Outcomes (Level 5).

## Implementation and Context

A majority of LETRS participants across the five districts were classroom teachers and typically instructed kindergarten through fifth grade. Participants most often became involved in LETRS to enhance knowledge of and develop foundational skills in reading instruction, to meet students' needs/better equip students to learn to read, to support readers who need extra support, and to understand the science of reading. Of those participating, nearly ninety percent had completed Volume 1 of LETRS training.

## Level 1: Participants' Reactions

Reactions to the LETRS training were generally positive. Participants reported that they enjoyed the training and found it more useful and relevant than other literacy-related professional development opportunities. Participants explained that the training goes beyond typical reading curricula for educators by providing more in-depth knowledge around the science of reading, phonemic awareness, and brain development. Participants also appreciated the research-based content and its applicability.

## Level 2: Participants' Learning

LETRS participants reported that the training had increased both their knowledge of and their skill with literacy instruction, which led to enhanced skills and application in the classroom. A deeper understanding of the science of learning allowed educators to identify gaps in resources and curriculum and fill those

gaps more effectively. Educators perceive that the LETRS training has given them a better understanding of the science of reading and has increased their skills more than other literacy-related training they had completed.

### **Level 3: Organizational Support and Change**

Some districts were supporting educators by providing monetary compensation or protected time to complete LETRS training. Centennial, PPS, and Reynolds were offering financial support, while Reynolds also provided dedicated time to focus on training and homework. Districts also supported educators by providing materials needed to complete the training and materials to implement it in the classroom. Further, some districts supported educators through coaching, TOSAs, and learning specialists. The most common barrier to LETRS participation was a lack of compensation and the time needed to complete the program. Many educators had to commit non-contract hours to complete the program, and the time commitment led to attrition in some cases.

### **Level 4: Use of New Knowledge and Skills**

LETRS participants reported that the LETRS training had changed their instructional practices and positively impacted how they carry out their job; they also indicated that they were able to put their LETRS training to use right away in their instructional practices. Administrators observed that LETRS trained teachers are able to identify the specific needs of individual students to determine what they can do more precisely to help, while participants noted that the training had positively impacted their ability to serve students from historically underserved subgroups. A lack of time for material and curriculum preparation made transferring of LETRS information to education practices difficult for educators.

### **Level 5: Student Learning Outcomes**

Educators across districts perceive that LETRS training has positively impacted the literacy outcomes of students. Participants also generally felt that the combination of the literacy curriculum in their district and their application of LETRS training was positively impacting student outcomes. Literacy assessment scores were examined by comparing results for students with LETRS-trained teachers to those with teachers not trained in LETRS. Some of the findings were promising even with many teachers still in the early stages of their LETRS training. Specifically, Reynolds School District and David Douglas School District both showed promising findings with students of LETRS trained teachers showing higher rates of reading at grade level than a comparison group. DDSO showed particularly promising findings as detailed below:

- When considering grades K-5, students of LETRS trained teachers were **1.71 times more likely** to have a Spring reading composite score at or above benchmark compared to students of non-LETRS trained teachers.
- When considering ELL students in grades K-5, students of LETRS trained teachers were **2.67 times more likely** to have a Spring reading composite score at or above benchmark compared to ELL students of non-LETRS trained teachers.
- When considering HU students in grade K-5, students of LETRS trained teachers were **1.51 times more likely** to have a Spring reading composite score at or above benchmark compared to ELL students of non-LETRS trained teachers.

# Introduction

Language Essentials for Teachers of Reading and Spelling (LETRS) is a professional learning program for early childhood educators and administrators focused on early literacy and language foundations. LETRS is offered by Lexia Learning, a company focused on literacy education. While other science of reading training programs are offered by other companies, those programs vary in density, length, and model. Over a two-year period, LETRS participants engage in online units, face-to-face sessions, readings, and dedicated time to practice applying skills in the classroom, with learning measured by quizzes, tests, and document submission. Within Multnomah County, five districts have begun investing in LETRS training, including Portland Public Schools (PPS), Reynolds School District (RSD), David Douglas School District (DDSD), Parkrose School District (PSD), and Centennial School District (CSD). In late 2021, Portland Public Schools, in partnership with the Multnomah Education Service District (MESD), submitted a proposal to the Oregon Department of Education requesting the use of GEER-II dollars to fund an independent evaluation of LETRS implementation and outcomes across the five named districts during the 2022-2023 school year. Ultimately, the study would aim to provide information that supports state-level decisions about whether and how to invest in LETRS training statewide.

Pacific Research and Evaluation (PRE) was selected through a competitive bid process to complete the independent study. In addition to a literature review on the impacts of LETRS training in similarly situated districts who have utilized LETRS for a longer period of time, the study was designed to include formative evaluation to assess program implementation across the five identified districts in Multnomah County and summative evaluation to assess the impact of LETRS on teacher and student outcomes in the 2022-2023 school year. A critical factor in the evaluation methodology is that LETRS training is designed to take up to two years, and four of the five districts included did not yet have any educators who had fully completed LETRS training as of the midpoint of the 2021-2022 school year. As such, student achievement outcomes will be considered to the extent feasible, but the primary focal points of the study will be program implementation and teacher-, school-, and district-level outcomes.

The purpose of this project is to study and learn from different models of LETRS implementation and support across five districts in Multnomah County to better understand the conditions and supports required to ensure that LETRS training results in the consistent, quality implementation of research-based teacher practices and, most importantly, improved student reading outcomes for our historically underserved students. This study is being designed to (1) support collaboration and data-based project planning within and across the participating districts and (2) inform the Oregon Department of Education as to whether and how greater statewide investment in LETRS training could lead to improved student outcomes in reading across our state. Given the important benchmark of 3rd grade reading, it proposed that this study focus specifically on LETRS training of educators supporting K-2nd grade students and student outcomes in this grade band. This is the primary focus of this report but other elementary grades are included where applicable.

The first aspect of the research study was to complete a comprehensive literature review. The purpose of this comprehensive review was to summarize and interpret the current body of literature related to the

utilization, implementation, and impact of LETRS training. This literature review provided information and background for the formative and summative evaluation of LETRS across the five identified school districts in MESD and supported the contextualization of findings in this report. To increase relevance and applicability to the five districts included in this study, this review focused to the extent possible on literature produced in the past decade and involving schools in urban locations. Where available, this review highlighted the findings and conclusions drawn from peer-reviewed empirical studies. A copy of this literature review can be found in Appendix A of this report.

## Methods

### Educator Fall and Spring Survey

A survey was conducted with educators from each district who had completed any part of the LETRS training. The survey was administered at two timepoints (Fall 2022 [N=139]; Spring 2023 [N=187]) to shed light on educator experiences and perceptions as they progressed through the LETRS program. In the Fall of 2022, 139 educators who met the study criteria<sup>1</sup> participated in this survey. When the survey was readministered in the Spring of 2023, 187 educators who met the study criteria responded. Note that survey participants were allowed to skip questions, and therefore the number of respondents represented in the findings throughout this report vary by item.

Of the 139 educators who responded to the survey in the Fall, the largest proportion worked within Reynolds School District (29.5%), followed closely by PPS (28.8%). In the Spring, PPS educators (45.5%) were the largest group of respondents. Table 1 displays the breakdown of educator survey participation by district at each timepoint.

*Table 1. Educator Survey - School District*

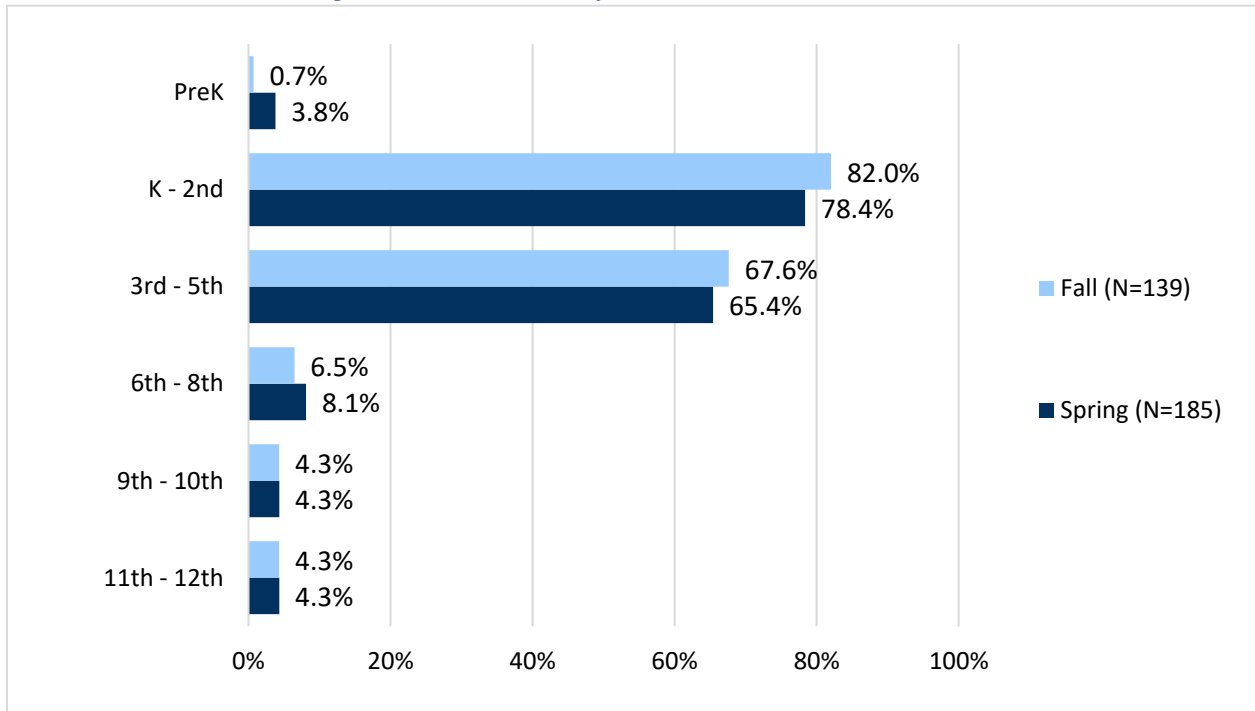
District	Fall Survey (N=139)	Spring Survey (N=187)
Centennial SD	16.6%	10.2%
David Douglas SD	20.9%	15.0%
Parkrose SD	4.3%	3.7%
PPS	28.8%	45.5%
Reynolds SD	29.5%	25.7%

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<sup>1</sup> Only survey responses from educators who worked with students in the kindergarten through fifth grade range and had participated in any LETRS training were included in this aspect of the study.

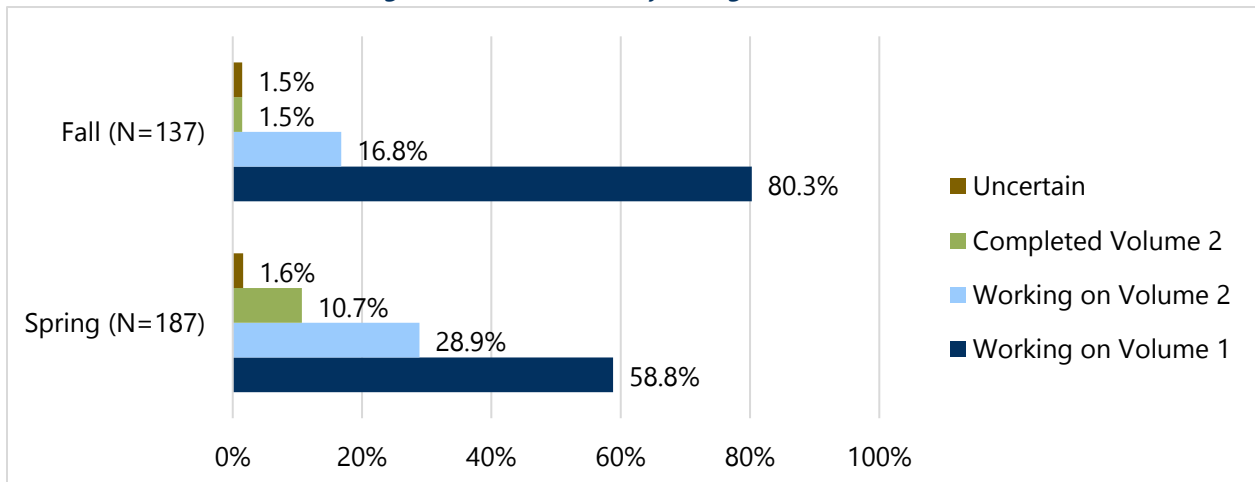
All educators included in this study worked with students in the kindergarten through fifth grade range. Many educators worked with students in multiple grade levels, including some who worked with middle and high school students in addition to elementary students. At both survey timepoints (Fall 2022 and Spring 2023), the highest majority of educators were focused on students in the kindergarten through second grade level. Nearly half of the educators who responded to this item (at either timepoint) selected more than one of the grade level options listed in Figure 1.

Figure 1. Educator Survey - Grade Levels Worked With



As of the Spring of 2023, educators had made varying levels of progress in their LETRS training. While most educators were still working on LETRS Volume 1, more educators had progressed into or completed Volume 2 by Spring 2023 as shown in Figure 2.

Figure 2. Educator Survey - Progress in LETRS



## Supplemental Study Survey

In Spring 2023, a survey of PPS educators was administered to assess educators' knowledge and perceptions regarding teaching developing readers. Participants included LETRS trained teachers (N=150), and a control group of teachers without any LETRS training (N=111). More information on the methods used for this study is included in the supplemental study section, beginning on page 66.

## Focus Groups and Interviews

Twenty-six educators from across the five target school districts participated in focus groups or interviews conducted in the Spring of 2023. As Table 2 displays, most of these educators were classroom teachers (n=15), and the district with the most educator representation was PPS (n=13).

Table 2. Educator Focus Groups and Interviews - District and Role

District / Role	Participant Count
<b>Centennial</b> <i>Classroom Teacher (1)</i> <i>Coach (2)</i> <i>Speech-Language Pathologist (1)</i>	4
<b>David Douglas</b> <i>Classroom Teacher (3)</i> <i>Specialist/Interventionist (1)</i>	4
<b>Parkrose</b> <i>Classroom Teacher (2)</i> <i>Specialist/Interventionist (1)</i>	3
<b>PPS</b> <i>Classroom Teacher (7)</i> <i>Specialist/Interventionist (4)</i> <i>Coach (1)</i> <i>Speech-Language Pathologist (1)</i>	13
<b>Reynolds</b> <i>Classroom Teacher (2)</i>	2
<b>Grand Total</b>	<b>26</b>

Nine administrators representing four of the target school districts participated in interviews in the Summer of 2023 (see Table 3). Most of these administrators were principals (n=6) at schools implementing LETRS professional development. In order to protect their anonymity, the roles of the three non-principal interviewees are not shared in this report.

Table 3. Administrator Interviews - District and Role

District / Role	Participant Count
David Douglas <i>School Principal (1)</i>	1
Parkrose <i>School Principal (2)</i>	2
PPS <i>School Principal (2)</i> <i>Other Administrator (1)</i>	3
Reynolds <i>School Principal (1)</i> <i>Other Administrator (2)</i>	3
<b>Grand Total</b>	<b>9</b>

Finally, six district key points of contact were interviewed in the Spring of 2023, including two PPS representatives, and one representative from each of the four other districts.

**Lexia Participation and Pretest/Posttest Data**

The LETRS learning systems platform, Lexia, was used to track educators’ progress on LETRS training as well as their Pretest and Posttest scores. Across the five target Multnomah County school districts, the total number of LETRS licenses associated with this project was 1,094.

Table 4. District Licenses

District	Total Licenses
Centennial	53
David Douglas	64
Parkrose	28
PPS	631
Reynolds	318
<b>Grand Total</b>	<b>1,094</b>

**Student Assessment Data**

Districts provided student achievement data from the 2022-2023 school year to shed light on the potential early student outcome impacts of the LETRS training program in Multnomah County schools. Specifically, achievement was examined by analyzing data from district literacy screeners which varied by districts and included: DIBELS, Acadience, iReady reading, and STAR assessment data. Additional details regarding these assessments and the design of the study are included in the final section of this report focused on student achievement findings. Data were provided for students of LETRS trained teachers as well as a comparison sample of students of teachers who did not participate in the LETRS training. Only students in the kindergarten through fifth grade with assessment data available from both Fall 2022 and

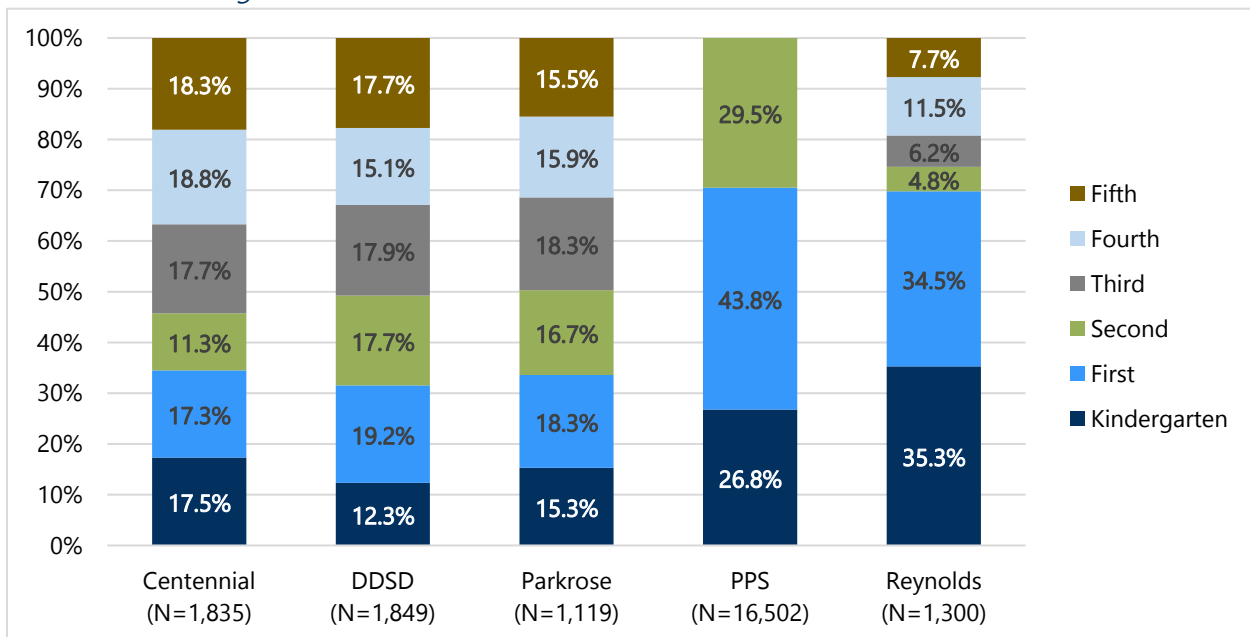
Spring 2023 timepoints were included in our analyses. Table 5 displays the number of students that are represented in the student achievement data treatment and comparison groups for each district.

*Table 5. Number of students with assessment data for each district*

District	Treatment	Comparison	Total
Centennial	389	1,446	1,835
David Douglas	362	1,487	1,849
Parkrose	252	867	1,119
PPS	2,195	14,307	16,502
Reynolds	1,051	249	1,300
<b>Grand Total</b>	<b>4,249</b>	<b>18,356</b>	<b>22,605</b>

The majority of student assessment data came from students in kindergarten and first grade for PPS and Reynolds, as shown in Figure 3, while the data were more evenly distributed across Centennial, DDS, and Parkrose.

*Figure 3. Grade level of students with assessment data for each district*



The tables to follow will display the demographic characteristics of the treatment groups students. The gender identity of treatment groups students represented in student assessment data is displayed in Table 6. Districts varied in the extent to which they provided information about the gender of students

included in student assessment data. Therefore, the percentages in the table below are based only on available data from each district (i.e., the number of students noted in the leftmost column of Table 6).

*Table 6. Student gender represented in assessment data for each district*

District	Male	Female	Non Binary
<b>Centennial</b> (N=407)	51.8%	48.2%	0.0%
<b>David Douglas</b> (N=362)	50.0%	46.1%	0.0%
<b>Parkrose</b> (N=252)	52.8%	46.8%	0.0%
<b>PPS</b> (N=2,195)	48.8%	50.9%	0.3%
<b>Reynolds</b> (N=189)	52.9%	47.1%	0%

Districts also varied in the extent to which the race/ethnicity of students was provided in combination with student assessment data. Table 7 displays the racial/ethnic representation of students included in each districts' student assessment data to the extent it was provided (see the number of students noted in the leftmost column).

*Table 7. Student racial/ethnic identity represented in assessment data for each district*

District	Asian	Black	Hispanic	Native American /Alaskan Native	Native Hawaiian/ Pacific Islander	White	Multiple
<b>Centennial</b> (N=2,051)	14.4%	8.2%	28.8%	0.5%	2.8%	37.3%	8.0%
<b>David Douglas</b> (N=1,849)	13.6%	12.2%	25.8%	0.5%	2.5%	30.6%	9.4%
<b>Parkrose</b> (N=252)	11.5%	19.8%	27.8%	1.6%	2.8%	51.2%	13.1
<b>PPS</b> (N=2,195)	13.0%	9.9%	15.9%	0.8%	1.4%	44.9%	14.1%
<b>Reynolds</b> (N=188)	3.2%	3.7%	56.4%	0.5%	1.1%	28.2%	6.9%

## Findings

The findings and discussion sections below are organized by the key research questions determined at the onset of this study. The first section of research questions focuses on the process districts used to implement LETRS, and the remaining five sections focus on the five levels of Guskey's<sup>2</sup> model for evaluating professional learning programs: Participants' Reactions (Level 1); Participants' Learning (Level 2); Organizational Support and Change (Level 3); Participants' Use of New Knowledge and Skills (Level 4); and Student Learning Outcomes (Level 5). Next, findings are presented from the supplemental study of

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<sup>2</sup> Guskey, T. R. (2000). *Evaluating professional development*. Thousand Oaks, CA: Corwin.

teacher knowledge and beliefs. This report concludes with a summary section highlighting key findings and evaluation insights.

## Implementation and Context

### Which educators received LETRS training?

According to both the Fall and the Spring surveys, the majority of the educators across all five districts who had begun or completed their LETRS training were classroom teachers. Educators who selected the “Other” option for their role included English language development teachers, speech language pathologists, special education teachers, reading interventionists, Title I teachers, an occupational therapist, and a school psychologist.

*Table 8. Educator Survey - Role*

Role	Fall Survey (N=139)	Spring Survey (N=187)
Classroom Teacher	60.4%	66.8%
Instructional Specialist	13.0%	12.3%
TOSA	8.6%	2.7%
Coach	5.8%	7.5%
Specialist	2.2%	1.1%
Principal	0.7%	1.1%
Other Administrator	0.7%	1.1%
Other role than listed here	8.6%	7.0%

Interview and focus group participants confirmed the survey findings with participants across the districts representing a range of positions, including classroom teachers, virtual teachers, instructional coaches, speech-language pathology specialists, and administrators. Of the administrators who participated in interviews, the majority had participated in introductory LETRS training specific to administrators. Points of contact interviewees from PPS and Reynolds mentioned that they had ELD and SPED teachers involved, Centennial noted that learning specialists and coaches participated, and DDS added that coaches participated in their district.

Across all districts, the majority (86.6%) of educators who had begun or completed their LETRS training by Spring of 2023 shared that the highest degree or level of school they had completed was a master’s degree (see Table 9). The eight educators whose highest degree was not a master’s or a bachelor’s degree indicated that they held doctorate degrees, professional degrees, and high school diplomas (or the equivalent).

Table 9. Highest Degree Earned

Degree Type	Participant Count
Master's degree	161
Bachelor's degree	17
Other	8
<b>Grand Total</b>	<b>186</b>

Almost all educators (94.0%) surveyed at the Spring timepoint had earned a college degree that was specific to the field of education. Just over half of those educators had attended college within the last ten years (50.8%), while about a third (33.9%) had most recently attended college between eleven and twenty years ago (see Table 10).

Table 10. Most Recent College Attendance

Year Range	Participant Count
2013 - 2023	93
2003 - 2012	62
1993 - 2002	24
1983 - 1992	4
<b>Grand Total</b>	<b>183</b>

According to points of contact interviewees, a majority of those involved in LETRS were kindergarten through fifth grade teachers. Districts also typically had a few middle school and high school teachers involved as well as a couple of administrators.

Survey respondents shared why they decided to participate in LETRS training. At both the Spring and Fall timepoints, respondents across all districts most commonly indicated they became involved in LETRS to enhance knowledge of and develop foundational skills in reading instruction, to meet students' needs/better equip students to learn to read, to support readers who need extra support, and to understand the science of reading. Further, interviewees noted that some educators became involved in LETRS after they heard positive reactions from their colleagues who participated early in implementation.

## To what extent did participating educators complete all components of the LETRS program?

As of June 2023, across all five districts nearly ninety percent (89.1%) of licensed educators had completed Volume 1 of the LETRS training (as indicated by having taken the Volume 1 Posttest). The district with the highest LETRS completion rate (indicated by having taken the Volume 2 Posttest), was Reynolds (see Table 11).

*Table 11. District Volume 1 and Volume 2 Test Completion Rates (Lexia Data)*

District	Total Licenses	Took Vol. 1 Pretest	Took Vol. 1 Posttest	Took Vol. 2 Pretest	Took Vol. 2 Posttest
Centennial	53	49 (92.5%)	19 (35.8%)	10 (18.9%)	5 (9.4%)
David Douglas	64	60 (93.8%)	25 (39.1%)	9 (14.1%)	1 (1.6%)
Parkrose	28	23 (82.1%)	7 (25.0%)	7 (25.0%)	3 (10.7%)
PPS	631	545 (86.4%)	317 (50.2%)	185 (29.3%)	118 (18.7%)
Reynolds	318	298 (93.7%)	139 (43.7%)	101 (31.8%)	81 (25.5%)
<b>Grand Total</b>	<b>1,094</b>	<b>975 (89.1%)</b>	<b>507 (46.3%)</b>	<b>312 (28.5%)</b>	<b>208 (19.0%)</b>

The two-year time commitment required to complete the LETRS program is longer than most training programs and resulted in participants committing nights and weekends to complete the training, according to points of contact interviewees; the program time commitment led to attrition for some districts, which can be seen in Table 11 above. Teacher focus group participants added that educators valued the knowledge they could pull at any stage throughout their LETRS participation, despite varying levels of program completion.

## Which curricular resources and balanced assessment systems did districts use in conjunction with LETRS implementation?

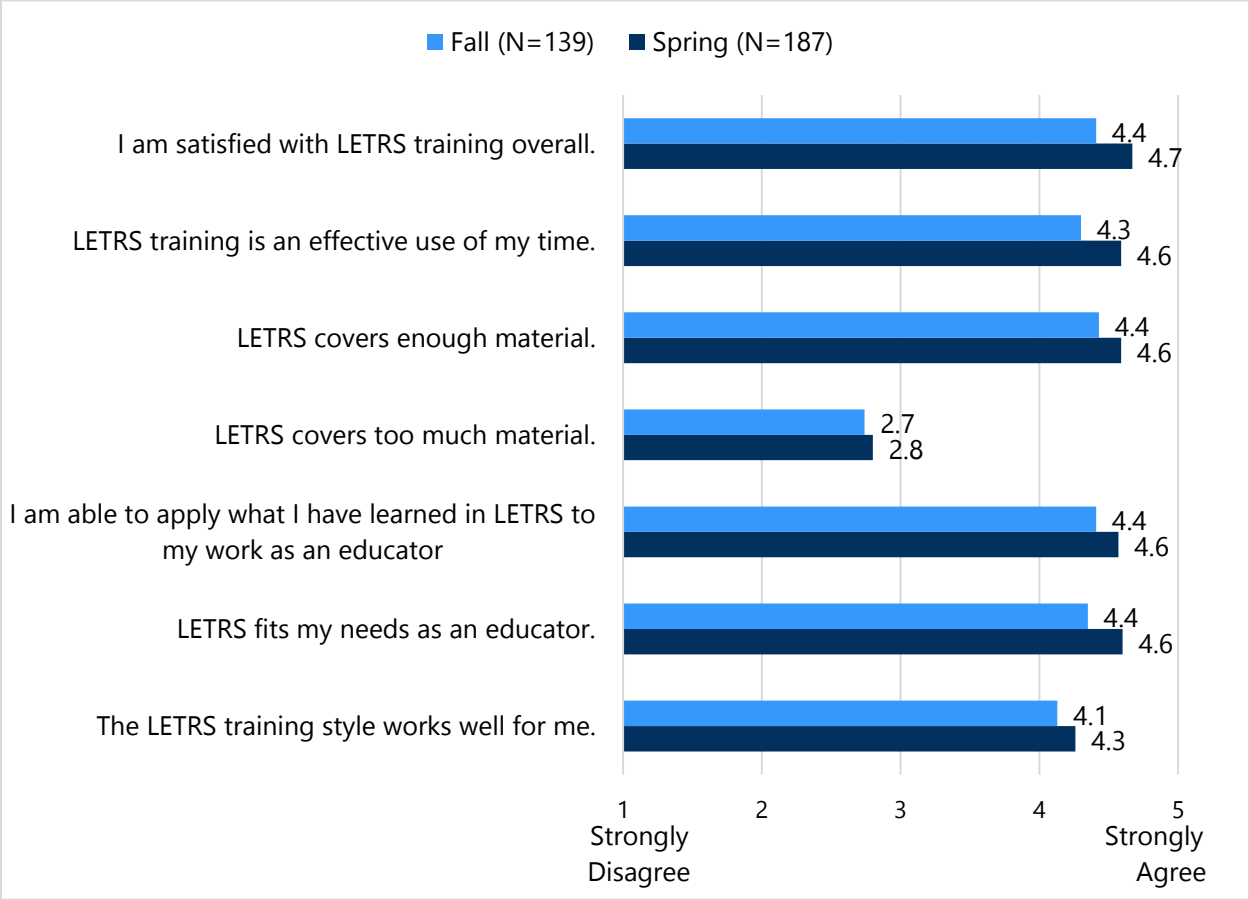
According to administrators, districts utilized a variety of curricular resources. Some districts utilized multiple curricula, with variation by grade. Curricula utilized included: 95 Percent Group, Heggerty Phonemic Awareness, Foundations, Geodes Reading Curriculum, Wit & Wisdom, Houghton Mifflin Harcourt (HMH) Curriculum, OpenCurriculum, Odell Education, ECRI, StudySync, Curriculum Associates iReady, and Amplicy. It is important to note that the 2022-2023 school year was a curriculum adoption year in Oregon and these were all newly adopted literacy curriculum. Regardless of the curriculum in place, points of contact indicated that LETRS was in alignment with these tools and many noted they were adopted because of this alignment. Some points of contact also mentioned the literacy screeners that their districts which included DIBELS, Acadience, STAR Reading, and iReady Reading.

# LEVEL 1: Participants' Reactions

## What were educators' reactions after participating in LETRS training? To what extent did educators like the training and find it useful?

Surveyed educators expressed positive perceptions regarding many aspects of their LETRS training, according to both the Fall and the Spring surveys. Figure 4 displays educators' average agreement ratings at each timepoint regarding a series of statements that are indicative of the extent to which educators liked the training and found it useful. All items were highly rated (with averages over 4 on a 5-point scale), with the exception of the statement "LETRS covers too much material," which received closer to a neutral level of agreement. Also, averages for all items were slightly higher at the Spring 2023 timepoint compared to the Fall 2022 timepoint.

Figure 4. Educator Reactions – Satisfaction with and Usefulness of LETRS<sup>3</sup>



<sup>3</sup> Due to participants skipping items, Ns vary slightly for the specific items listed in Figure 4. To save space and increase readability, the Ns reported in the legend of Figure 4 represent the highest number of responses to any of the listed item. This same format is used throughout this report whenever multiple items appear in a Figure together.

In focus groups and interviews, teachers, instructional coaches, and speech-language specialists provided feedback reinforcing the positive reactions demonstrated in survey findings. Many of these educators found that the content in the training allowed them to develop a better understanding of foundational principles regarding the science of reading and literacy and appreciated the quality and multiple modalities of interactive training materials. Some teachers noted that they could relate much of the training content to their current classroom curriculum due to the applicability of concepts and activities implemented throughout the LETRS units. Further, they appreciated the flexibility with which they could complete the LETRS training; however, some noted that they would have benefitted from additional opportunities to take training modules during contracted hours (e.g., district-funded staff development days) rather than relying on time after school or on weekends.



*"I appreciated being able to go at my own speed within reason and adhere to the [LETRS] schedule when I could. I thought that the presenters and online quizzes were well done and the Bridge2Practice was classroom applicable."*

*– PPS Teacher*

*"I am noticing that the foundational skills in our [school] curriculum are aligned to the phonics lessons that were in the LETRS training, so I am enjoying that."*

*– DDS Teacher*

*"I like how there are different instructional models and that it is engaging. The videos help break down the heavy workload and a lot of the materials are applicable and easy to do in the classroom."*

*– PPS Teacher*

Administrators shared positive feedback similar to that of educators. Their feedback reinforced that educators were developing new ways of thinking about reading instruction by learning about the science of reading. Further, points of contact described the LETRS PD as "useful" and "practical." An administrator from PPS echoed educator feedback that they could utilize the PD immediately: "[Educators] learn something new they didn't learn when they were in college. It's new learning but practical learning that they can then take and use in their classroom right away." Further, administrators observed that LETRS training tools were successful with students. A Centennial administrator made the additional point that understanding the theory has catalyzed teacher buy-in at their district.



*"I have heard lots of educators at various stages of their careers say that this has really helped them understand how students learn to read in ways that they never fully understood before and has helped them think about how to use their curricular resources more skillfully."*

*– PPS Administrator*

*"I think they found it incredibly helpful in terms of just really being able to develop an understanding of the why behind some of the things they were already doing."*

*– Parkrose SD Administrator*

*"I think they felt like it really got to the core of the basics of the brain, the science behind it, and how we learn to read. I think that was fascinating and teachers were genuinely curious about that."*

*– PPS Administrator*

Administrators also acknowledged the LETRS training workload, highlighting the intensity of the LETRS training as an overwhelming factor for some participants. Points of contact similarly noted that the PD is a lengthy time commitment with a lot of work required of participants. Points of contact interviewees further explained that the time requirement led to attrition of participants in DDS and PPS.

Across all districts, surveyed educators discussing what they liked most about the training confirmed they appreciated the research-based, science of reading content and the content's applicability. Educators also emphasized the usefulness of the multi-modal, self-paced training format. Overall, educators' responses remained consistent from the Fall to the Spring survey. In the Fall, however, they also highlighted the comprehensiveness of the training as an aspect of LETRS they liked. In the Spring, PPS educators shared appreciations for the support from the trainers and the training resources (e.g., the manual).



*"There are many modes to interact with and apply the content. The independent learning is complemented by interactive webinars, where we can ask questions and strengthen/deepen/extend what we have learned."*

*– PPS Educator*

*"I love the scope of the material. It is comprehensive and detailed, and very valuable."*

*– Parkrose Educator*

*"Skilled presenters and a really great resource book and activities."*

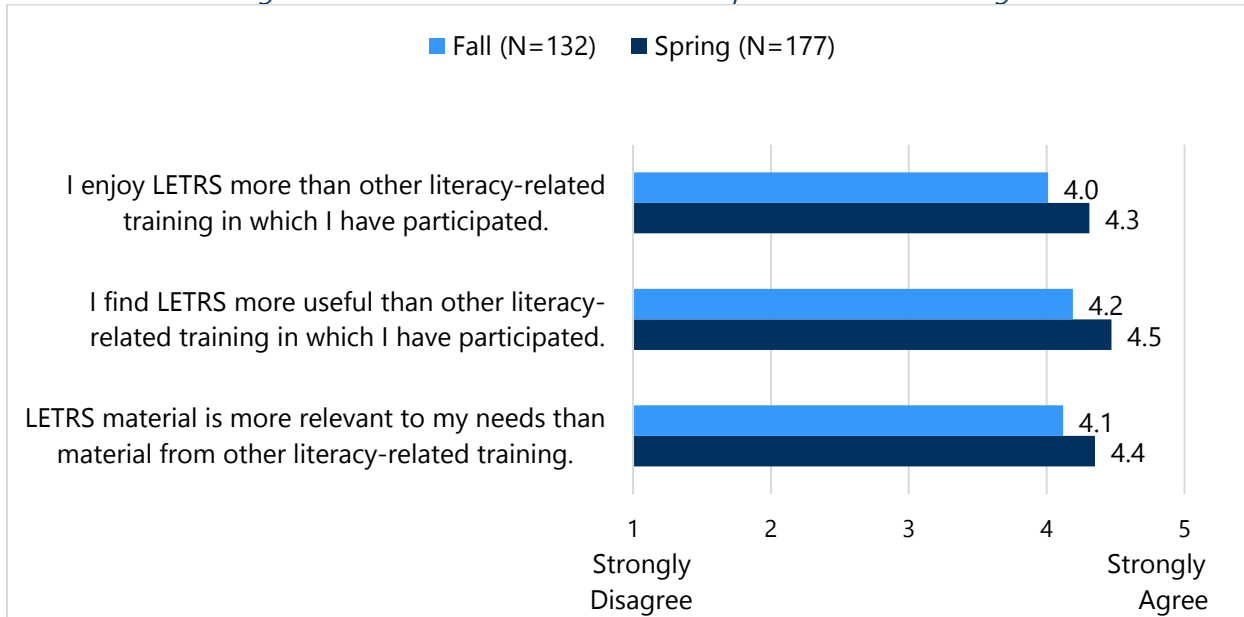
*– PPS Administrator*

## How did educators perceive enjoyment and utility of LETRS training differed from other literacy-related trainings?

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According to both Fall and Spring surveys, educators agreed that they not only enjoyed the LETRS training more but found it more useful and relevant compared to other literacy-related training. As shown in Figure 5, educators' agreement was slightly higher on average at the latter (Spring) timepoint.

Figure 5. Educator Reactions – LETRS Compared to Other Trainings



Similarly, administrators agreed that LETRS goes beyond typical reading curricula for educators by providing more in-depth knowledge around the science of reading, phonemic awareness, and brain development. Relatedly, administrators noted that the lengthy commitment required by LETRS training differs from other literacy-related trainings.



*"I think LETRS is providing a deeper knowledge of literacy that is not something we gain from basic curriculum training or instruction. In college we all had the big five reading instructional philosophy and understanding, but that was surface level when compared to the deeper understanding that LETRS provides."*

*– DDS Administrator*

*"They are enjoying what they are getting out of it, but it can be overwhelming to do your full-time job plus all of the time that it takes in order to fully grasp the LETRS training."*

*– Reynolds Administrator*

Educators in focus groups and interviews also felt the LETRS program was more comprehensive than other literacy training. They appreciated learning about student-centered learning experiences based on the foundational principles of the science of reading and noted that LETRS provided them with knowledge in these areas that went beyond prior training experiences. Further, some shared that the in-depth approach of LETRS training gave them the confidence to implement activities from the training in their classrooms; whereas, previous training opportunities had been time-constrained and less descriptive.



*"Over the years, a lot of the training opportunities that I have had have shown how to run small reading groups or how to use diagnostic tools to keep student records. In LETRS, however, it starts with understanding how kids learn to read and write, and then builds around how students access their learning. It is more student-centered."*

*– PPS Teacher*

*"The LETRS training is very intensive. The time that LETRS takes allows the program to have depth, whereas other professional development that we have had during district-directed training sessions do not have the time to go as deep."*

*– Parkrose Teacher*

*"The LETRS training wasn't too much to where it felt like busy work, but enough to where teachers felt confident to implement it in the classroom. I liked the Bridge2Practice in a sense that it encouraged me to instantly incorporate what I was learning in LETRS to my classroom."*

*– Parkrose Teacher*

When comparing the LETRS PD to other PD opportunities, a DDSD administrator echoed other data sources, stating that the LETRS training differed from others in that it was "far more in-depth." Administrators from Centennial, DDSD, and PPS offered the additional feedback that participants described LETRS training as the "best" or "most impactful" PD they had ever attended.



*"Time and time again, teachers are saying it's the most impactful professional learning course they have taken."*

*– DDSD Administrator*

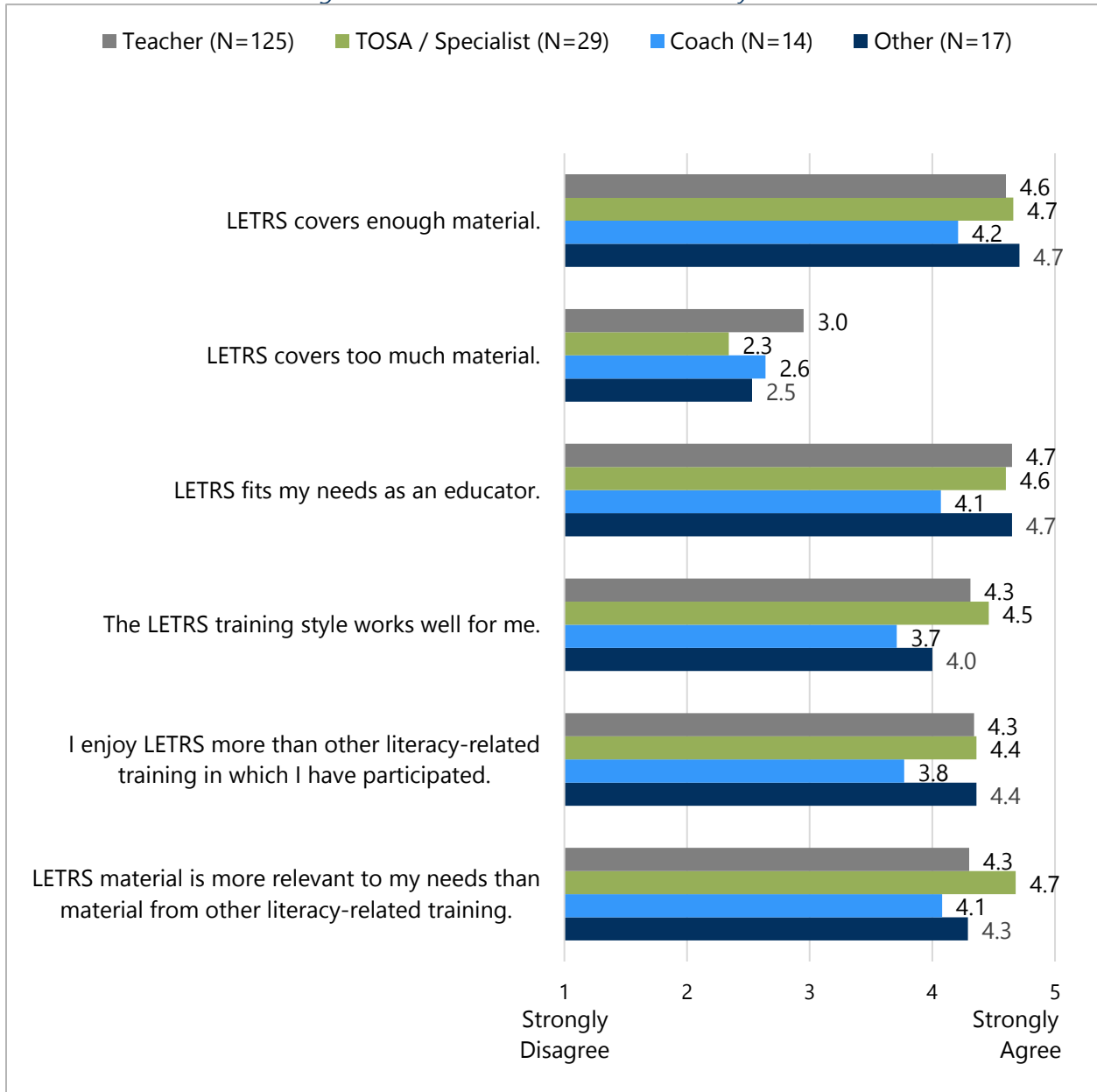
In contrast, two teachers from Reynolds School District shared experiences with a program, Success for All, which they felt was more intensive than the LETRS training. They indicated that, while they found the LETRS program to be similar, they preferred the Success for All program and its use of positive coaching, in which professionals from the program provided faculty with intentional monthly opportunities for mentorship and collaboration.

## Did reactions differ by educator type?

Educators in a variety of roles responded similarly to survey items regarding their reactions to the LETRS training. Because the Spring survey was administered more recently and at a time when educators were further along in their LETRS training, Spring survey data, rather than Fall survey data, was used to examine differences in responses based on role (note that combining data from the two timepoints was not possible because many of the same participants responded to both surveys). Also, due to small number of participants in certain roles, some roles were grouped together for the purposes of comparison, resulting in the following comparison categories: Teacher; TOSA / Specialist (including instructional specialist); Coach; and Other. The category labeled Other includes principals and other administrators, as well as participants who indicated on the survey that their role was something other than the options available.

Figure 6 displays the results of items that were found to have at least half a point (0.5 on a 5-point scale) of variation in responses based on educator type. Findings revealed that, compared to educators in other roles, coaches tended to have somewhat lower levels of agreement with statements indicative of how much they liked LETRS and found it useful. Additionally, compared to other educators, TOSAs and specialists expressed the strongest agreement that the LETRS training material was more relevant to their needs compared to material from other literacy-related training.

Figure 6. Variation in Educator Reactions by Role



## LEVEL 2: Participants’ Learning

There is clear evidence of participant learning in the Lexia pretest and posttest scores from each volume. LETRS participants from all school districts improved their Average Vol. 1 score and Average Vol. 2 score on the posttest when compared to the pretest.

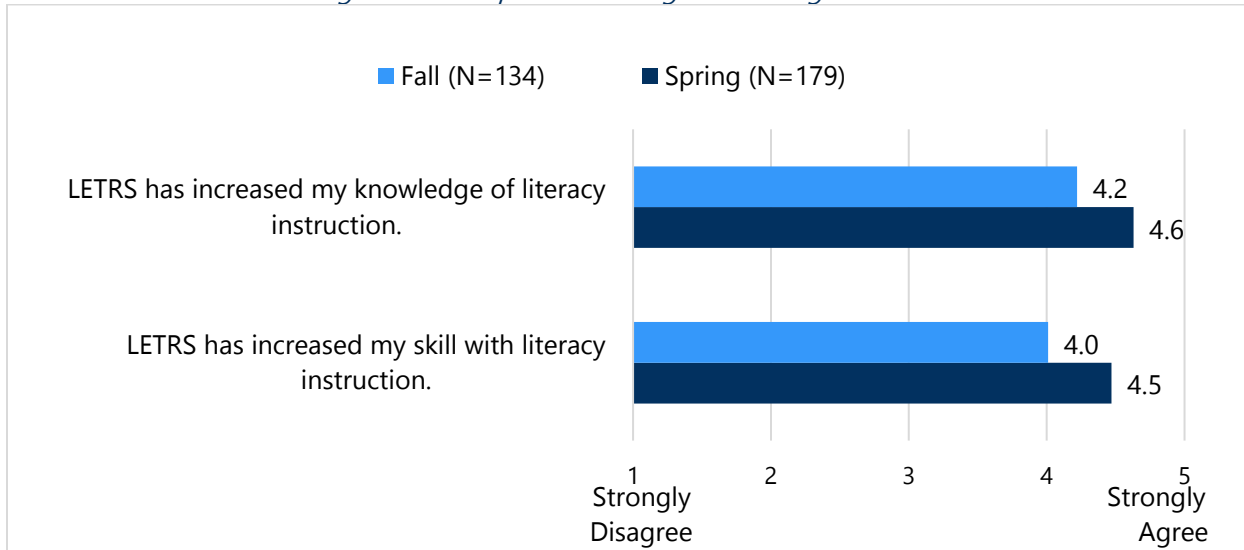
Table 12. Lexia pretest and posttest scores from each volume

District	Average Vol. 1 Pretest Score	Average Vol. 1 Posttest Score	Average Vol. 2 Pretest Score	Average Vol. 2 Posttest Score
Centennial	65% (n = 49)	95% (n = 19)	84% (n = 10)	96% (n = 5)
DDSD	64% (n = 60)	90% (n = 25)	79% (n = 9)	88% (n = 1)
Parkrose	66% (n = 23)	93% (n = 7)	79% (n = 7)	94% (n = 3)
PPS	63% (n = 545)	89% (n = 317)	80% (n = 185)	94% (n = 118)
Reynolds	56% (n = 298)	92% (n = 139)	77% (n = 101)	96% (n = 81)

### To what extent did educators perceive their knowledge and skills were impacted by participating in LETRS training?

Educators surveyed at both the Fall and the Spring timepoints expressed that LETRS had increased both their knowledge of and their skill with literacy instruction, as Figure 7 illustrates. Encouragingly, this sentiment was even stronger at the Spring timepoint compared to the Fall timepoint, indicating that as educators progressed through the LETRS training they felt more strongly that their knowledge and skills had increased.

Figure 7. Participants' Learning – Knowledge and Skill



Classroom teachers, reading specialists, and academic coaches who participated in the focus groups agreed that the LETRS program increased their application of literacy knowledge and skills in the classroom. Administrators added that LETRS participants' direct application to the classroom helped to reinforce their deep understanding and value gained from the LETRS training. For example, an administrator at DDS noted LETRS participants showed more confidence in their teaching and were making more adjustments to their instruction in the moment.



*"Now, I think more about the specific components of learning how to read. For example, I understand more about consonant and vowel articulation, which I am able to include in my lessons with students. My knowledge of morphology and vocabulary instruction has deepened; so much learning has happened for me."*

– Parkrose Teacher

*"The direct application piece of learning and then directly connecting to applying in the classroom has been really helpful."*

– Parkrose Administrator

Administrators also noted that teachers' deeper understanding of the science of reading has allowed them to identify gaps in resources and curriculum and fill in those gaps more effectively. One administrator noted that LETRS has helped teachers to break down the components of literacy to identify the specific needs of students to address gaps more effectively in their literacy skills development. Teachers, reading specialists, and academic coaches supported this sentiment, indicating that they felt as though they were better able to prioritize classroom activities to add to their curriculum following their participation in LETRS due to the program's evidence-based strategies.



*"LETRS has helped me look at the [reading intervention] programs that I am currently using to teach to see what their strengths are and be able to supplement their learning wherever there are holes."*

*– PPS Teacher*

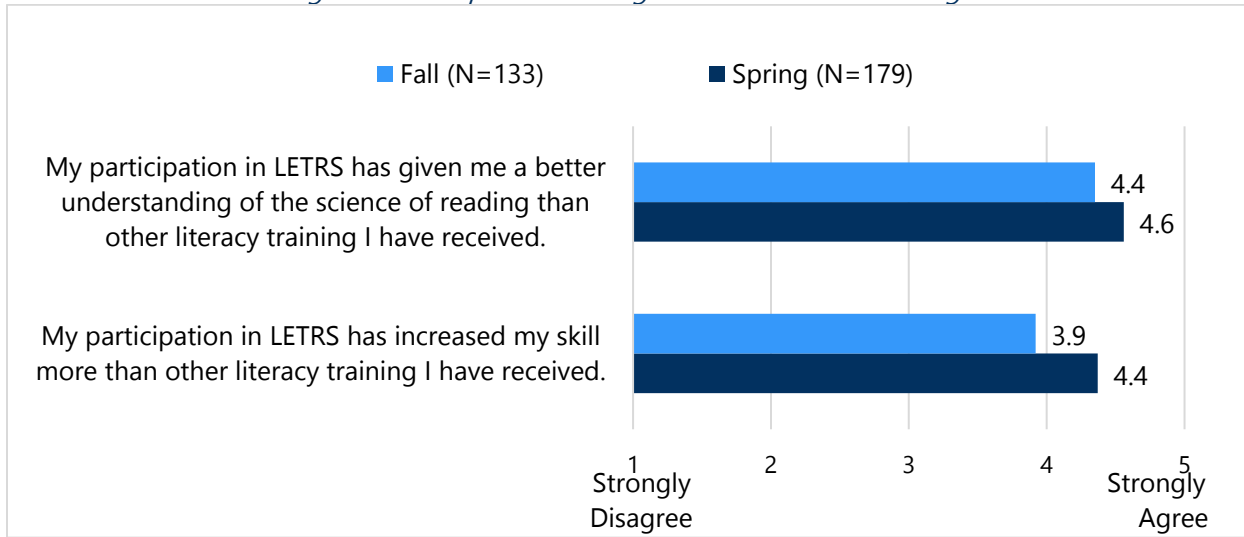
*"No materials are going to be perfect and have everything. Having that background knowledge now around the science of reading through LETRS has really helped teachers to develop that critical lens in terms of looking at how can we use those tools and fill in the gaps."*

*– Parkrose Administrator*

## How did educators perceive learning from LETRS training differed from other literacy-related trainings?

The thorough nature of the LETRS training combined with the focus on science of reading were the primary factors differentiating it from other literacy training. Educators think the LETRS training has given them a better understanding of the science of reading and had increased their skills more than other literacy-related training they had completed (see Figure 8). Again, this finding was more pronounced at the Spring timepoint compared to the Fall timepoint, suggesting that the further educators got in their LETRS training the more they felt that the LETRS training outperformed other trainings in these ways.

*Figure 8. Participants' Learning – LETRS vs. Other Trainings*



At both timepoints, educators across school districts noted that LETRS is more in-depth and comprehensive, is based on the science of reading and associated research on the brain, and is generally superior to other literacy-related trainings they had participated in previously. Administrators and points of contact also felt that LETRS was more thorough than other literacy-related trainings due to its focus on the science of literacy. At the Spring timepoint, educators from PPS noted the immediate applicability of LETRS training to their instruction and highlighted how LETRS has helped them work with student

subgroups (i.e., students with Dyslexia, struggling readers, and ELL students). At the Spring timepoint, educators from Reynolds also emphasized how LETRS teaches phonemic awareness which was also emphasized in teacher focus groups with all districts.

Through the focus groups, educators commonly shared that they either had not received literacy-related training opportunities prior to their participation in LETRS or that their prior training did not provide them with enough background knowledge on the science of literacy.



*"I had very little training before, and LETRS has been amazing because it seems very complete. I don't really have anything to compare it with because I didn't get any trainings and things like that, but it is very thorough, and I really enjoy it."*

*– DDS Teacher*

## LEVEL 3: Organizational Support and Change

### What supports did districts provide for educators engaging in LETRS training?

With regard to the type of support districts provided for LETRS training, a primary difference across districts was the compensation and protected time provided to complete the training. As shown in Table 13, participants from Centennial, PPS, and Reynolds received financial compensation for their participation in LETRS training, while Reynolds participants received dedicated time to focus on training and asynchronous LETRS homework through late school start time on Mondays and other days each month set aside for the work. Reynolds also attempted to offer two non-student contact days for training but faced obstacles when the planned PD fell on snow days. The findings in the table below were gathered via interviews and focus groups.

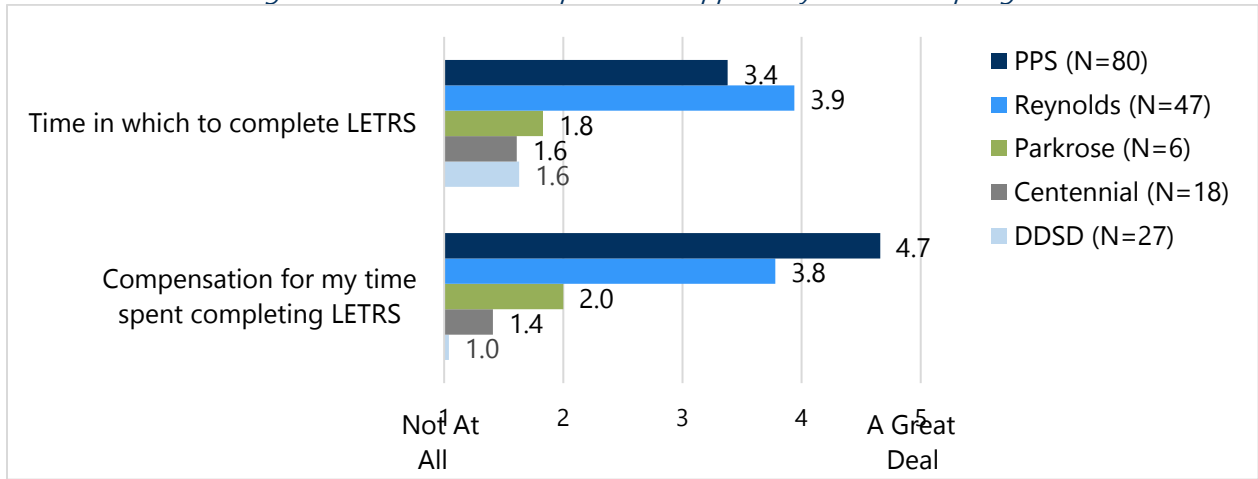
*Table 13. Compensation and protected time provided to complete LETRS training*

District	Received monetary compensation	Received protected time for LETRS training
Centennial	✓	
DDSD		
Parkrose		
PPS	✓	
Reynolds	✓	✓

Figure 9 displays LETRS participants' perceptions reported on the Spring survey of the support they received from their district in the form of financial compensation and protected time. Educators in the PPS

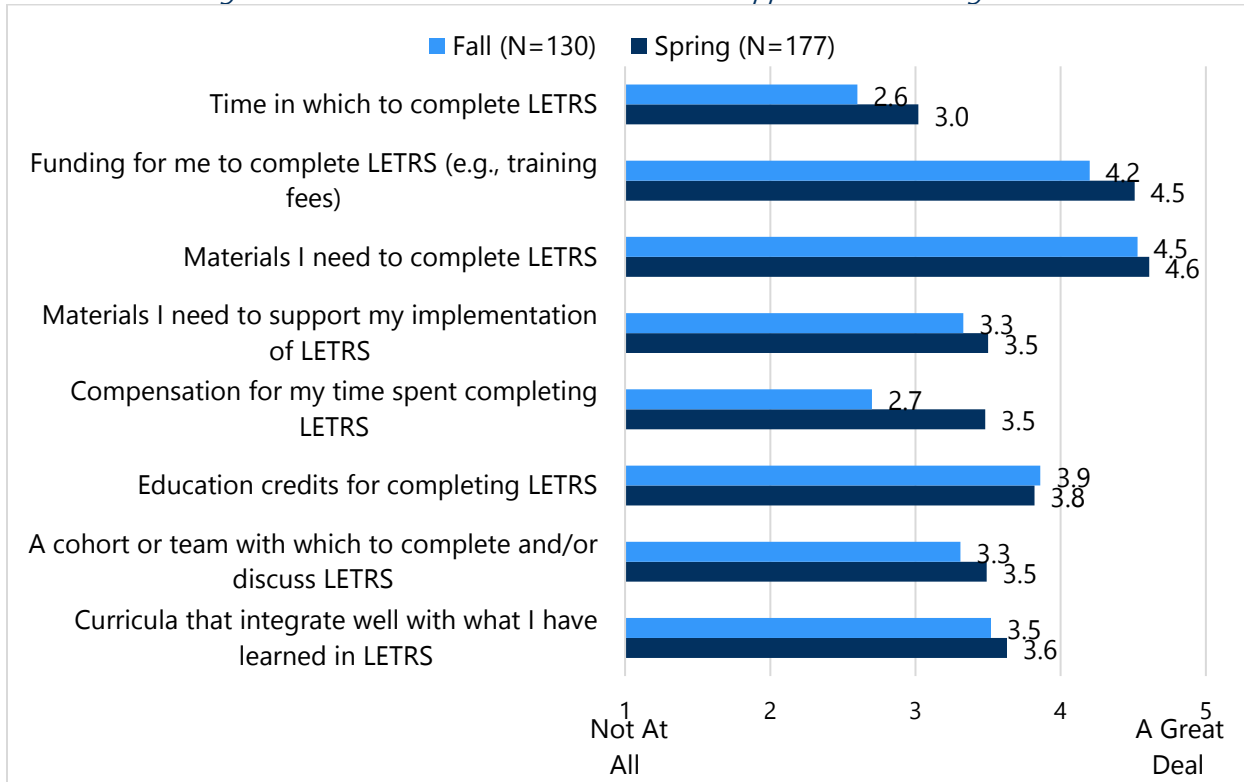
and the Reynolds school districts generally perceived more support from their districts related to time and compensation compared to educators in the other three districts, which can be expected given they are receiving this type of compensation.

*Figure 9. Variation in Perceptions of Supports by District in Spring*



Although there was a desire for additional support around time and compensation, Educators felt supported by their districts through funding and materials needed to complete their training. As shown in Figure 10, educators reported more support from districts in these (as well as other) areas at the Spring timepoint versus the Fall timepoint, potentially indicating that efforts by districts to support teachers grew stronger over the school year. At the Spring timepoint, educators from DDSD and Parkrose expressed appreciation for district-provided coaches and encouragement around participation.

Figure 10. Extent to which Districts Provided Supports Surrounding LETRS



Teacher focus group participants described additional supports that were helpful for making progress in LETRS. One teacher from PPS appreciated that they were able to easily access LETRS materials, as information was consolidated to one website. A few teachers across the five districts shared that they enjoyed LETRS Unit wrap-up sessions where they could discuss the training content with their colleagues. Administrators and points of contact added that participants from Centennial, DDSD, and Reynolds received support from coaches, which they noted was useful for implementation. Similarly, participants from PPS received support from TOSAs, while participants from DDSD received support from learning specialists.



*"I would say the building where LETRS was strongest is where we had solid coaching support because it helps people take risks. We had coaches modeling, as well as videoing themselves and teachers."*

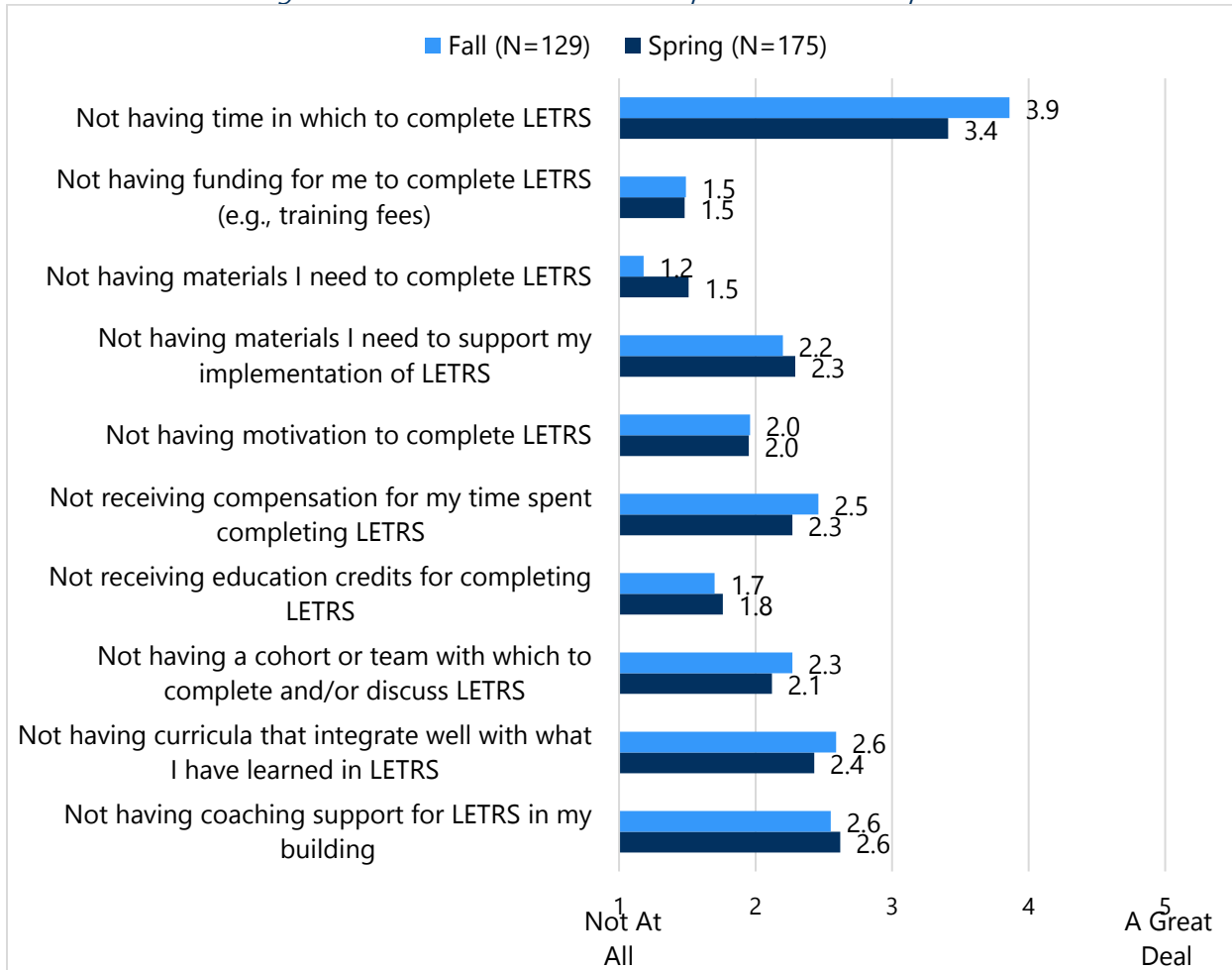
– Centennial Administrator

Along these lines, all district interviewed administrators agreed that they would like to continue to provide LETRS training to their educators along with a PLC, accountability group, or an accountability partner to increase endurance and application of the training. Finally, a DDSD administrator highlighted support from MESD, while a Centennial administrator spoke positively about support offered through learning walks.

## Under which conditions and/or supports did educators perceive they were best able to complete LETRS training? What barriers influenced educators' completion of LETRS training?

The most common barriers are aligned with the themes from the section above regarding the lack of time and compensation to complete the training. The most challenging aspect of completing the LETRS training was a shortage of time to complete the training; this finding was more pronounced at the Fall timepoint than at the Spring timepoint (see Figure 11).

Figure 11. Extent to which Barriers Impacted LETRS Completion



Open ended survey responses also referenced time as the greatest barrier to their participation, as did nearly all focus group and interview participants. Due to the length of the program, points of contact and teachers noted that participants had to commit non-contract hours such as mornings before school, evenings, and weekends to complete the program. Further, educators from PPS indicated that, prior to their first Saturday LETRS training session, they were only given one week's notice, and some were unable to attend. While teachers valued the level of rich content provided to them through the LETRS training, they commonly shared that they would prefer to keep their weekends free to maintain a healthy work-life balance. As such, teacher focus group participants indicated they would like more time during the

workday to complete the training. Points of contact added that participants from Parkrose, PPS, and Reynolds requested release time for LETRS but that a substitute shortage made this difficult to offer.

Points of contact added insight about time constraints, sharing that Centennial and DDS D were implementing new curriculum simultaneously with LETRS, which further limited available time for those participants. While PPS points of contact felt the training was too long for a learning opportunity outside of a university, DDS D and Reynolds points of contact questioned if the program could be shortened and still be as beneficial. One positive regarding the program length, according to the Reynolds and DDS D points of contacts, is that it generated excitement for the program as well as a sense of urgency.

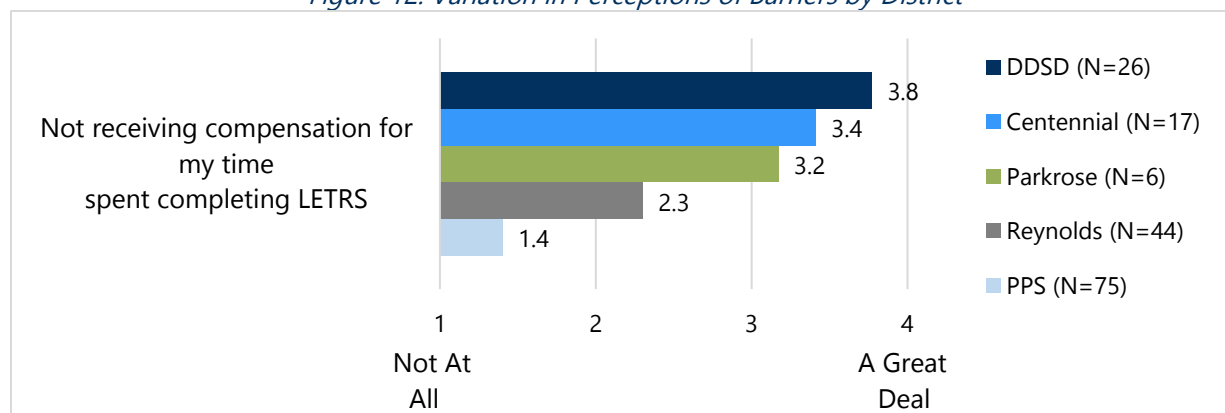
Because the time program time commitment led to attrition in some cases, districts addressed this barrier—in addition to those offering financial compensation and protected time—using a few methods. For example, while PPS supported participants to stay on track with pacing guides, Centennial offered reminders. Further, Reynolds offered LETRS as a fast-paced, two-year program (the traditional length) and a slower-paced, four-year program to address time constraints; however, some participants in the four-year track are now interested in finishing faster.



*“A lot of the teachers who are doing the slower pace [version of LETRS] struggle with completing it in the given timeline, because the district gives teachers one hour on Mondays to complete the training units. It is a real struggle to complete what they need to complete in the timeline that is wanted.” -Reynolds Teacher*

As discussed in the previous section, districts had inconsistent experiences with compensation for time to complete the training. Figure 12 shows that a lack of compensation for time to complete the training was a key barrier to completion for DDS D, Parkrose, and Centennial, the latter of which received some financial compensation.

Figure 12. Variation in Perceptions of Barriers by District



Although PPS and Reynolds received compensation to participate in LETRS, points of contact from their district indicated that these participants—along with those from Parkrose—expressed interest in receiving a pay raise for completing the program; however, to receive a wage increase participants need to take the program for college credit, which poses some obstacles. Additionally, a few teachers from Parkrose noted

financial challenges, as they paid for their LETRS program upfront and, at the time of the focus group, were unsure whether they would be provided with tuition reimbursement for their participation.



*"If the district had not provided the hourly pay, I would have liked to have done it, but would not have been able to commit to that many hours of unpaid work. I was paid, so I did it. One colleague expressed interest in completing Volume 2 of LETRS, but after hearing that the district would not pay for it, they decided to not do it. If people are not getting paid, they do not want to do it."*

*– PPS Teacher*

Some teachers and administrators also noted barriers with participating in the LETRS program on their own, as opposed to going through the program with a cohort of colleagues from their school or engaging in PLCs. A few educators shared feelings of isolation or lack of recognition from their administration, due to being the only faculty member to participate in the training. Some expressed interest toward increased opportunities for collaboration or coaching, such as designated meeting times for LETRS participants to discuss the training content and homework, or opportunities for literacy training professionals to provide mentorship to those involved in the training. Administrators also suggested it would be beneficial to meet collectively as a school to review progress data and create a "team effort" mindset around the implementation of LETRS knowledge and track progress around meeting literacy goals as a school.



*"I do not think that the district was able to dedicate time to see what I was learning about [from LETRS] or to create cohorts of people who were taking LETRS to collaborate. I think it would have been a richer experience if my administration had something where people who were doing LETRS program had some dedicated time to work together."*

*– PPS Teacher*

PPS did not provide a cohort format or in-person sessions for LETRS training. PPS Administrators noted in interviews that this as a barrier to engagement and completion of LETRS and indicated that an accountability group or partner may lead to a better experience, endurance, and application of training. Parkrose, Reynolds, and DDSD administrators agreed that LETRS participants who were able to participate in the training with others, benefitted from going through the training with group support.



*"I really do think it probably has worked best where people are in learning communities doing it together and where there's some kind of coaching or administrative support to support ongoing learning and bridge to practice."*

*– PPS Administrator*

*"Having conversation and being able to do the learning together and then apply it and come back together to talk about how it went; that type of thing was really beneficial. I think if you don't have a cohort or at least one other person that is doing it with you simultaneously, that could be a barrier."*

*– Parkrose Administrator*

*"I would definitely recommend LETRS so long as it's not in a vacuum. If teachers aren't talking about the learning and using some of that learning within another PLC or PD, I think that is a barrier."*

*– PPS Administrator*

Teachers from PPS and Reynolds also shared that they could benefit from more support with integrating LETRS into their classroom instruction, while administrators requested walkthrough tools to help them identify LETRS implementation within classrooms. Along these lines, administrators would like a way to monitor the progress of training participants to enable them to provide touchpoints to trainees throughout the year. A few teachers shared in focus groups that they experienced difficulties with implementing activities from the LETRS program, as they were not provided with the materials (e.g., magnetic letters, felt squares) required for them. Some participants suggested that, in the future, teachers could be provided with material starter kits to aid in the initial rollout of activities from LETRS.



*"Let's have a non-contact professional development day. Let's make sure that teachers have the support. Let's start ordering the magnetic tiles and make sure that teachers have access to the resources being referenced in the training."*

*– Reynolds Teacher*

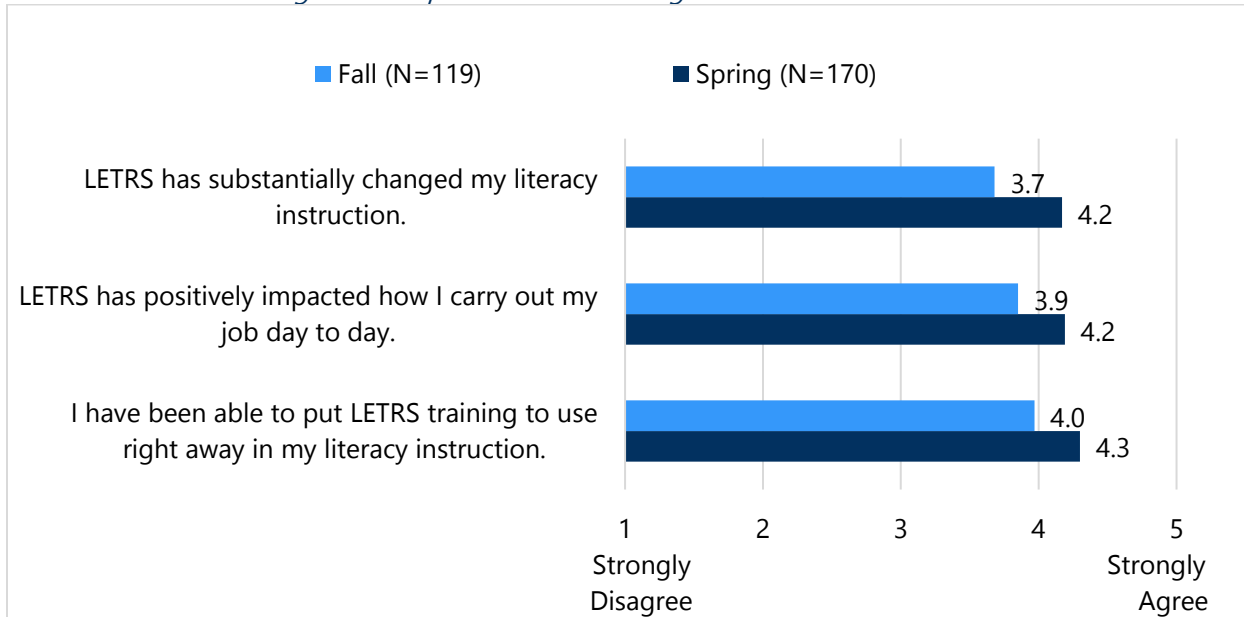
Finally, administrators requested a systematic way to showcase LETRS having a positive impact on students as a means to increase buy-in and interest in the training.

## **LEVEL 4: Use of New Knowledge and Skills**

### **To what extent did educators report changes in their instruction based on LETRS training?**

Overall, educators agreed that the LETRS training had changed their instructional practices and positively impacted how they carry out their job; they also agreed that they were able to put their LETRS training to use right away in their instructional practices (see Figure 13). Variation between Fall and Spring survey results suggests that as educators progressed through the LETRS training over the course of the 2022-2023 school year they felt more strongly that LETRS had impacted their literacy instruction.

Figure 13. Impact of LETRS training on Instructional Practices



In focus groups and interviews, educators across the five districts reported changes in the ways in which LETRS participants altered their curricular approach and mindset regarding teaching literacy. For example, one DDS administrator shared how classroom teachers have developed greater confidence in assisting students through evidence-based literacy teaching resources.



*"I do think I hear more confident language about all our kids deserving access to learn to read. I think LETRS is probably a part of that statement. Not that I think anyone would have ever said the opposite, but I think there were practices that demonstrated some of that inherent bias or predisposition. I feel there are more teachers who are saying "all kids can learn to read."*

– DDS Administrator

One administrator from Reynolds noted that teachers who participated in the LETRS training were moving toward an asset-based approach in their literacy instruction, as opposed to a deficit-based teaching approach, "With our instructional coaches, I could see a shift in their thinking through how they talked about the students. Rather than using deficit language, they would use more asset-based language and carry that into their coaching of teachers."

Administrators observed that LETRS trained teachers are able to identify the specific needs of individual students to determine what they can do more precisely to help. Prior to this deeper understanding, they were only noting the students' broad need and lacked clarity around how to address it. One DDS administrator observed that teachers with strong application of LETRS are seeing big improvements with their students as a result of having a deeper understanding of phonemic awareness to develop early literacy in students.



*“One teacher who really uses the curriculum and supplemental materials with intention and integrity, saw 83% of their first graders at or above typical growth for DIBELS. That is a 40% difference from their counterparts who are not in LETRS or don’t have a strong understanding of the science of reading.”*

*– DDS Administrator*

Classroom teachers expanded on this phenomenon, as focus group participants across the five districts expressed increased understanding and confidence in utilizing a well-developed and fine-tuned instructional toolbox to best understand the root of student learning challenges. One DDS teacher shared, “When it comes to decoding a word, I now encourage students to take their time to chunk the word and to not just guess what it is. Before LETRS, I would just say the word to them, which was not helpful.”

Further, classroom teachers who participated in focus groups noted increased confidence in prioritizing curricular resources that were evidence-based in their instruction. One indicated that they were forgoing any instructional practices that did not have any research or evidence behind them, due to the efficacy of evidence-based approaches found in LETRS.



*“I have a better sense of what needs to be prioritized within our curriculum. I have always felt that I was not prepared to teach reading, especially small group reading. I feel so much more prepared now that I have this background knowledge from LETRS.”*

*– DDS Teacher*

Finally, administrators from Centennial shared that LETRS participants started applying what they learned in staff meetings, trainings, and PLCs to help grow LETRS throughout the district.

## **What barriers did educators perceive in transferring learning from LETRS training to their educational practices?**

Educators shared barriers to transfer of learning from the LETRS training to their classroom instruction. Across the Fall and Spring, respondents from Centennial, DDS, PPS, and Reynolds expressed a lack of time for material and curriculum preparation, and classroom implementation. Further, they felt as though transferring knowledge was difficult, due to how much information is embedded within the training.

In focus groups and interviews, there were a few barriers that classroom teachers and reading specialists across the five districts experienced when transferring learning from the LETRS training to their instructional practices, including student buy-in, shifts in fundamental teaching principles, time spent incorporating LETRS into curriculum, and relevancy of LETRS to reading specialist roles. Those who shared feedback regarding student buy-in noted challenges with incorporating phonics principles in their lesson plans, as most students were reading or spelling at some level, despite having challenges with phonics. Since most students were able to read or spell, they often questioned why they were learning about foundations of literacy in their classes, yet teachers shared that students were more receptive to the LETRS inspired instructional approach following explanations of the science of reading.

One teacher from Centennial commented on shifting the fundamental teaching culture of encouraging students to move forward in their curriculum, regardless of whether that student felt ready to progress to a mastery approach that was encouraged in LETRS.



*"A huge challenge I see is the expectation of teaching to mastery is a huge fundamental shift for many teachers. There has been a culture where expectations [in the classroom] do not require students to obtain mastery of content before moving ahead in the curriculum. We tell the students that they don't have to spell their words correctly or just to write something down, because we need to move on to the next chapter. That is education as a whole."*

*-Centennial Teacher*

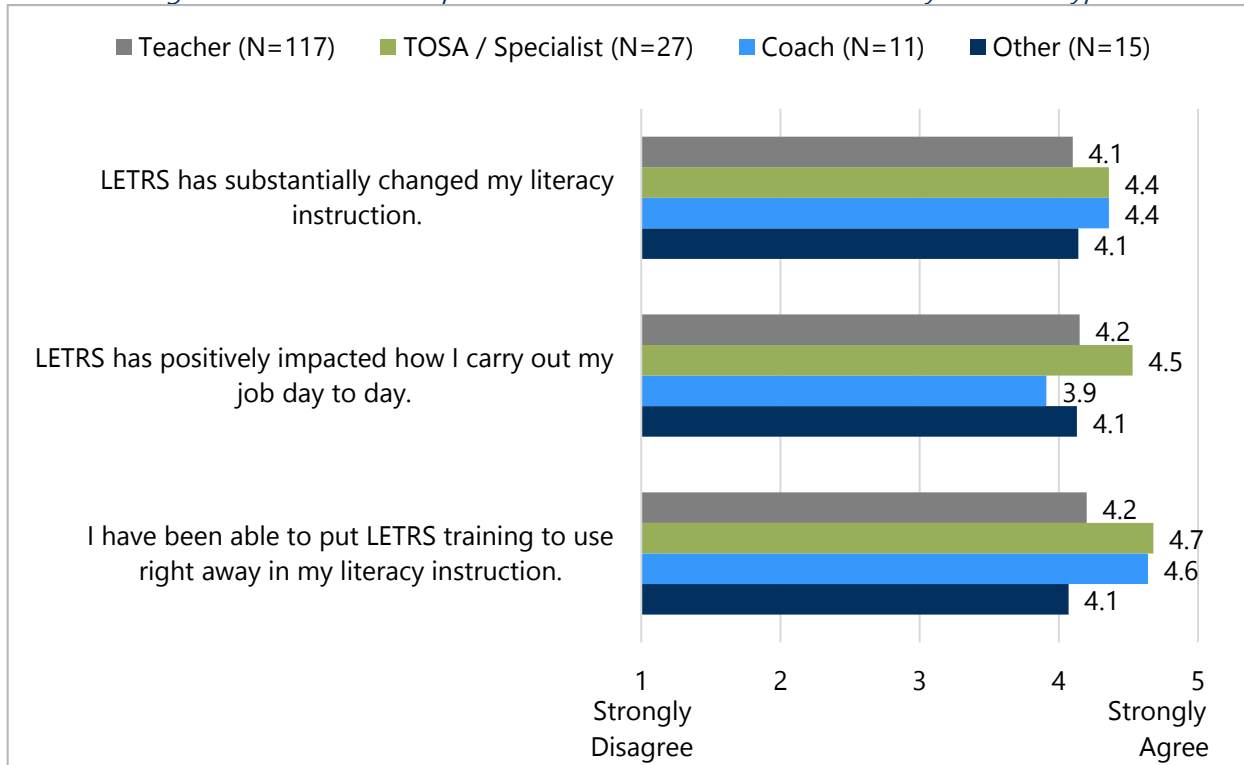
Some teachers and reading specialists expressed challenges with the time associated with incorporating LETRS into their curriculum. One teacher shared that they had incorporated a new literacy curriculum at their school in addition to their participation in LETRS, thus it was challenging to learn how to navigate the new curriculum while incorporating knowledge or activities found in LETRS. This barrier was addressed by a Parkrose administrator who expressed challenges with adopting a new curriculum and knowledge from LETRS simultaneously. Two reading specialists from PPS shared that they experienced barriers in applying their LETRS knowledge in their roles as they only worked with students on a short-term basis, as opposed to classroom teachers who worked with their students throughout most of their school day.

### **Did educators' use of knowledge and skills from LETRS training differ by type of educator?**

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According to Spring survey results (displayed in Figure 14), educators in various roles reported high levels of agreement when it came to their perceptions that LETRS had impacted their literacy instruction and how they carry out their job. On average, TOSAs and specialists (including instructional specialists) expressed stronger agreement that LETRS had positively impacted how they carry out their day-to-day jobs. TOSAs and specialists as well as coaches expressed stronger agreement that they had been able to put their LETRS training to use right away, compared to teachers and other types of educators.

Figure 14. Variation in Impact of LETRS on Instructional Practices by Educator Type



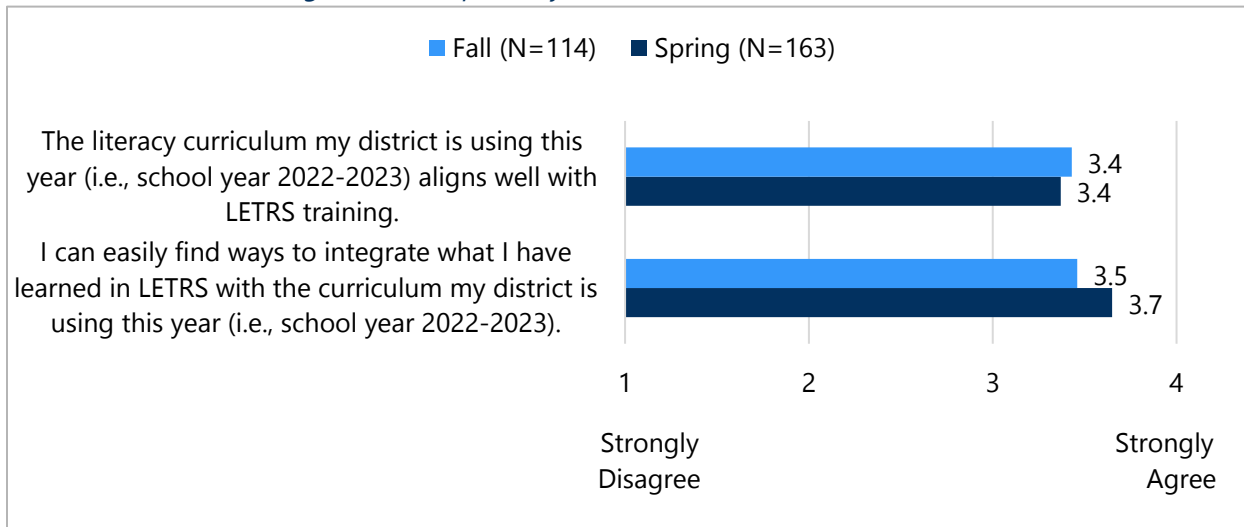
### Under which conditions and/or supports did educators perceive they were best able to transfer learning from LETRS training to their educational practices?

Spring survey respondents from Centennial provided open-ended feedback regarding resources and experiences that have helped them transfer their learning from LETRS into their classrooms, in which a variety of themes were noted. Some felt that their own efforts and differentiation skills were the most beneficial factors, while others highlighted the videos provided by the training and the training’s emphasis on foundational literacy principles, such as phonics. Coaching, collaboration, and learning walks also facilitated the transfer of learning from LETRS training to the classroom according to administrators from PPS, Centennial, DDSD, and Parkrose. A Reynolds administrator mentioned plans to offer PLCs in the upcoming school year to support transfer of learning in their district.

### How did educators perceive curricular resources and balanced assessment systems districts used in conjunction with LETRS implementation impacted their ability to transfer learning from LETRS training to their educational practices?

At both the Fall and the Spring timepoints, most educators shared that they agreed or strongly agreed that the literacy curriculum their district used during the 2022-2023 school year aligned well with the LETRS training. Educators also felt that they could easily find ways to integrate what they learned in LETRS with their district’s current curriculum (see Figure 15).

Figure 15. Compatibility of LETRS with Curricular Resources



There were mixed reactions expressed in the focus groups regarding the utilization of curricular resources and balanced assessment systems used in conjunction with LETRS. In DDS, two teachers shared conflicting commentary regarding the ECRI (Enhanced Core Reading Instruction) curriculum when paired with LETRS, in which one felt that they paired “beautifully” and the other felt as though ECRI was not as detailed as they were wanting.



*“I think LETRS has paired beautifully with what we are doing in ECRI. All I need to do is use the strategies I have been learning in LETRS to fine tune things in the curriculum. It has been awesome.”*

– DDS Teacher

Teachers who reported using the Foundations curriculum in conjunction with LETRS all shared positive feedback regarding the pairing, specifically as it related to the alignment of curriculum and course content from LETRS. Focus group participants from Reynolds who used the HMH curriculum reported alignment with LETRS as shared by one teacher: “We are doing HMH, which ties in well with LETRS. The way that our literacy curriculum is broken down has a section built for one classroom day of phonics and phonemic awareness and one day of writing.”

### How did educators perceive LETRS training impacted their ability to serve students from historically underserved student subgroups?

Educators were encouraged to reflect upon the ways in which their LETRS training impacted their ability to serve students from historically underserved groups. Educators from Parkrose, across the Fall and Spring, indicated that their training heightened their ability to identify and address skill gaps. In the Spring, respondents from DDS, Parkrose, PPS, and Reynolds shared that their instruction in general shaped their

experiences in addressing barriers relevant for students from historically underserved backgrounds. Aside from these observations, educators across all five districts noted that it was too soon to tell any other impacts as they related to historically underserved student subgroups.

Qualitative data highlighted numerous ways in which LETRS training impacted educators' ability to serve students from historically underserved subgroups. Administrators and teachers spoke to increased preparation, awareness, and empowerment to support students' literacy goals following LETRS participation. One administrator from Reynolds shared that the classrooms led by teachers who participated in LETRS showed greater literacy growth when compared to other classrooms.



*"We have 63% BIPOC students. We have more than 14 languages spoken. The teachers that really dug into LETRS had the highest growth in our school. I know there are many compounding factors around it, but all of them had good growth this year with their students."*  
– Parkrose Administrator

Classroom teachers and reading specialists across the five districts highlighted their increased confidence in using evidence-based strategies to target various literacy challenges experienced by a wide range of students. One teacher from Parkrose shared that increased access to and visibility of diagnostic tools provided by the LETRS program led to a better understanding of students' academic needs and increased transparency for student academic achievement. They shared, "LETRS is very straightforward with assessments and for our families who want to know why their child is not reading. There is an equity piece to this, especially for families who have not been treated correctly by the school system. The assessments take away the ability to be subjective about a student. It shows the family where the student is and what they know." Further, a teacher from PPS noted that they were better able to determine which students should be referred to special education programs, as LETRS provided examples of skills that needed to be met at each grade level.



*"It has been helpful to identify which students need to be referred to special education. LETRS made it much easier to tell where each student's level of needs was when I had the necessary skills to assess."*  
– PPS Teacher

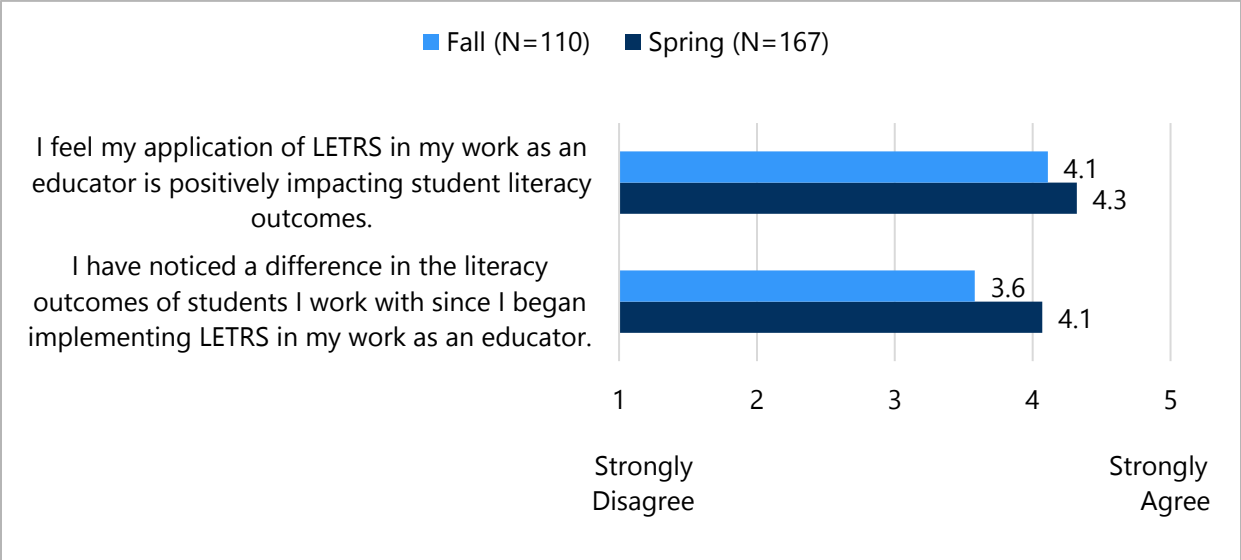
Qualitative data revealed a unique perspective, in which they noticed increased academic performance for ELD (English Language Development) students in LETRS classrooms, as teachers who participated in the training were provided with specific reading interventions necessary for ELD students.

# LEVEL 5: Student Learning Outcomes

## To what extent did educators perceive that student outcomes were impacted by LETRS training?

Educators perceive that their LETRS training has positively impacted the literacy outcomes of their students. This positive finding was especially pronounced at the Spring timepoint, when educators were further along in their LETRS training and when their students had spent more time receiving their instruction (see Figure 16).

Figure 16. Perceptions of LETRS Impact on Students' Literacy Outcomes

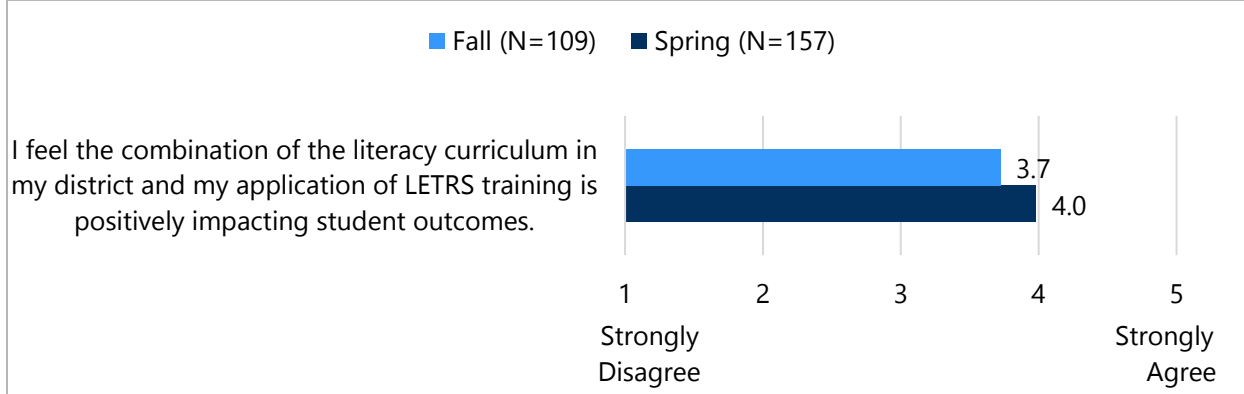


Teacher survey respondents from DDSD shared positive feedback regarding student outcomes that were impacted by their LETRS training. One teacher shared that student growth was “huge,” while another reported higher Spring benchmark scores in their classroom. A DDSD administrator shared that preliminary data showed that a group of teachers working as a team are showing particularly strong outcomes for students, surmising that collaboration is a factor in this success. Similarly, a Centennial administrator has seen positive shifts in outcomes, with improvements most prevalent where there were coaches. According to a PPS administrator, MAP data are showing improvements, while a Parkrose administrator generally noted success and growth for students as well.

## How did educators perceive curricular resources and balanced assessment systems districts used in conjunction with LETRS implementation impacted student outcomes from LETRS training?

Educators mostly agreed that the combination of their districts' literacy curriculum and their application of LETRS training was positively impacting student outcomes. As Figure 17 displays, educators reported slightly higher levels of agreement at the Spring timepoint compared to the Fall timepoint.

Figure 17. Impact of Curricular Resources and LETRS Training on Student Outcomes



Further, the following curricular resources and balanced assessment systems were shared by classroom teachers in focus groups and interviews:

- DIBELS
- Phonics screeners
- iReady reading diagnostic
- Magnetic Reading
- MAP Reading
- STAR assessment
- Informal assessment (e.g., encouraging students to read aloud to the educator)

Regarding the efficacy of curricular resources and balanced assessment systems in conjunction with the implementation of LETRS, there were mixed comments from educators in focus groups and interviews. Educators from DDS shared that they found DIBELS to be an effective tool in progress monitoring, and two reading specialists from DDS shared that the phonics screeners they used to inform instructional decisions were helpful. Across districts, a couple teachers expressed challenges with the iReady computer platform’s data retrieval programs. They shared that the data management systems were more difficult to interpret, due to a lack of graphs and difficulties deciphering whether students were understanding the digital content or pressing on random computer keys.

One teacher from Parkrose noted that their school had adopted a new program, Magnetic Reading, for benchmark testing, but expressed a preference for their previous system, Acadience. They shared that they preferred the data management system implemented in the Acadience system, as it was easier to understand student growth.



*"We use the iReady reading diagnostic and students do that on the computer three times a year. I don't love that because it is hard to know how valid the results are. For instance, younger students sometimes just click around on the computer and teachers are unable to know what students are responding to."*

*– Parkrose Teacher*

*"Time, I think. Just having the time to do LETRS-focused work and rolling it out in our classrooms."*

*– PPS Teacher*

## Despite the limited timeframe within which to monitor student outcomes, was there evidence of improved outcomes for students whose educators engaged in LETRS training?

Teacher focus group and interview participants who engaged in LETRS all shared positive feedback regarding student outcomes. Some noted that, at the time of the focus group or interview, they were anticipating continuous literacy growth among students in their classrooms. One teacher from DDSD highlighted student progress following their LETRS training, credited by increased district assessment scores and improvements in informal observations (e.g., students reading aloud to their teachers).



*"We are moving. We are still not quite at grade level, but it is a big job. It takes time and we are doing it. Phonics has an equity piece to it and some of my most vulnerable learners have been doing well with the strategies from LETRS."*

*– PPS Teacher*

One educator shared that, because of LETRS, they experienced a shift in mindset regarding the measurement of student progress. They shared,



*"I have had a shift in that I might not see a payoff in six weeks, which is when we do our interventions. Sometimes if teachers see no growth at the end of six weeks, we think that there is a problem. Now, I am seeing the payoff of things that I did last year with my students, and I feel like I have more of an understanding of waiting for students to mature."*

*– Parkrose Teacher*

# Evidence from Student Achievement Data

The following sub-sections discuss student achievement outcomes for each district. Because of differences in the types of assessment used, and in pursuit of the most meaningful data insights, it was determined that districts' findings should be presented separately. A series of logistic regressions were conducted to explore potential differences in student achievement outcomes between treatment (i.e., students with LETRS trained teachers) and comparison (i.e., students with non LETRS-trained teachers) groups. For most districts, these tests did not reveal statistically significant findings.

**For David Douglas School District, there was a significant effect of the LETRS training on student achievement for K-5 students. This significant finding was present when examining student achievement for English Language Learners and Historically Underserved Race/Ethnicities. Additional details regarding these promising findings are included the DDSD sections to follow.**

## A Note on the Use of Literacy Screeners for Evaluation Purposes

The data produced from the Literacy Screeners included in this section of the report are designed to help teachers identify children at risk for reading difficulties and determine the skills to target for instructional support. They are designed to be part of a feedback loop that operates within each classroom each year, serving as a tool for teachers to reevaluate their lesson plans and strategies. For this reason, assessments should be used as a descriptive tool rather than an evaluative tool. Since these screeners are the only assessment of early literacy skills, they are analyzed in this report for descriptive purposes, but we caution giving too much weight to the results.

## Testing for Intervention Effects in Education

It is often challenging to see the impact of a teacher professional development program on student achievement outcomes in education. With this in mind, we encourage you to consider the following as you read this section:

- ◆ As presented at the beginning of each districts' section, many teachers had not yet completed the LETRS training.
- ◆ In educational intervention research, it is extremely rare to find evidence of student achievement outcomes associated with teacher professional development in less than 2 years.
- ◆ 2022-23 was a literacy curriculum adoption year in Oregon and all districts in this study adopted curriculum that is aligned with the Science of Reading. Although teachers from the comparison groups in our study were not LETRS trained, they were using curriculum designed to support teaching to the science of reading.

# Centennial School District

Centennial School District used Acadience Reading, formerly DIBELS NEXT, and STAR Reading as its literacy screeners during the 2022-2023 school year. The impact of LETRS training on student achievement was assessed by examining Acadience and STAR data for students of LETRS trained teachers (treatment) compared to students with non-LETRS trained teachers (comparison). LETRS-trained teachers included any educator at Centennial who had started the training and could be at any stage. The table below shows the progress of Centennial educators and indicates that nearly three quarters of the 58 LETRS participants were on Volume 1 of the training.

*Table 14. Centennial LETRS Participants' Progress on Training*

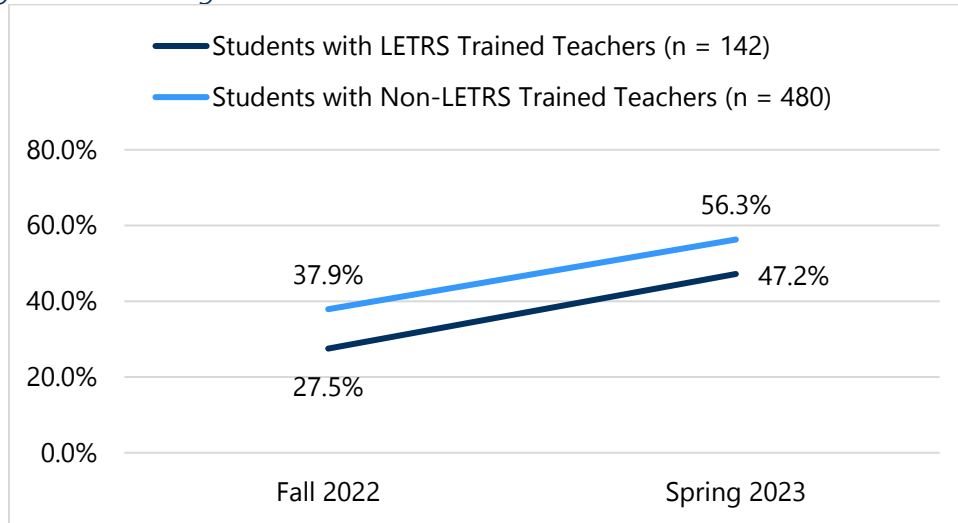
Progress	% (n)
On Volume 1	74.1% (n = 43)
On Volume 2	13.8% (n = 8)
Completed	12.1% (n = 7)

The Acadience assessment was completed by kindergarten and first grade students at Centennial. For this assessment, students' numeric scores were associated with four composite score categories: well below benchmark; below benchmark; at benchmark; and above benchmark. The percentage of students at or above benchmark on the Acadience Reading assessment were combined and compared at Fall and Spring timepoints for the two groups of students.

The STAR assessment was completed by third through fifth grade students at Centennial. Similarly, students could score in four categories on the STAR assessment: urgent intervention; intervention; on watch; and at/above benchmark. The percentage of students at/above benchmark on the STAR assessment are compared at Fall and Spring timepoints for the two groups of students as well.

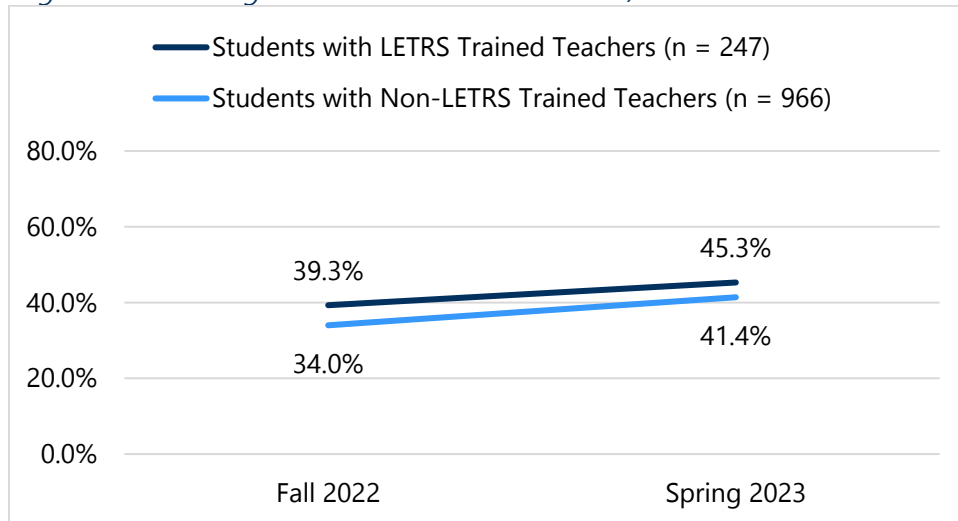
An analysis of Acadience and STAR assessment data did not provide evidence of an overall impact of LETRS training on student reading achievement in CSD. The figure below presents the percentage of K-2 Centennial students reading at or above grade level in the Fall and Spring. At both timepoints a higher percentage of K-2 students who did not have LETRS trained teachers scored at or above benchmark. (Figure 18).

Figure 18. Percentage of Centennial K-2 Students At or Above Benchmark on Acadience



Conversely, a higher percentage of 2-5 students with LETRS trained teachers scored at/above benchmark on the STAR assessment at both timepoints as shown in Figure 19.

Figure 19. Percentage of Centennial 2-5 Students At/Above Benchmark on STAR



When broken down by grade level, kindergarten and first grade students mirrored the larger K-2 trend with the comparison group showing a higher percentage of students reading at grade level or higher at both timepoints (See Figures 20 and 21).

Figure 20. Percentage of Centennial Kindergarten Students At or Above Benchmark on Acadience

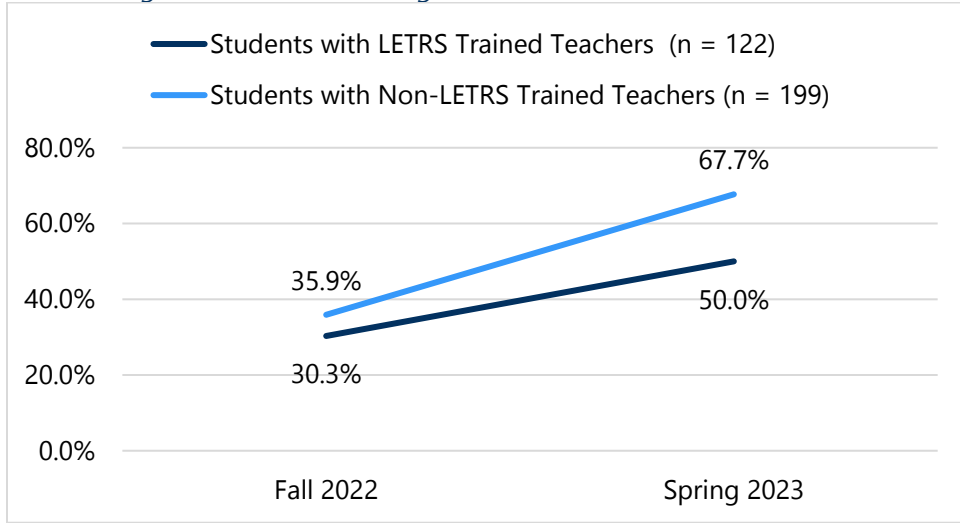
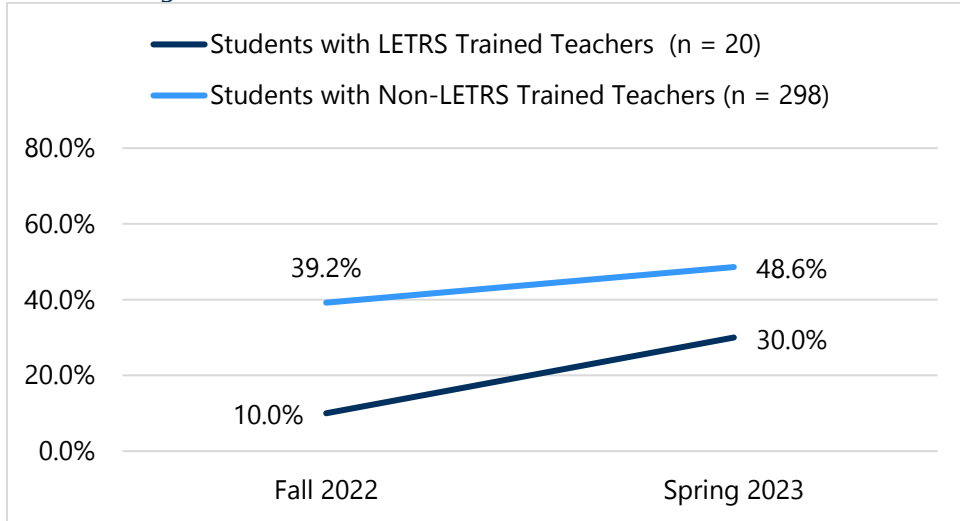


Figure 21. Percentage of Centennial 1st Grade Students At or Above Benchmark on Acadience



For second and third grade Centennial students, there was a slight increase from Fall to Spring in the number of students reading a grade level (Figure 22 and Figure 23).

Figure 22. Percentage of Centennial 2nd Grade Students At/Above Benchmark on STAR

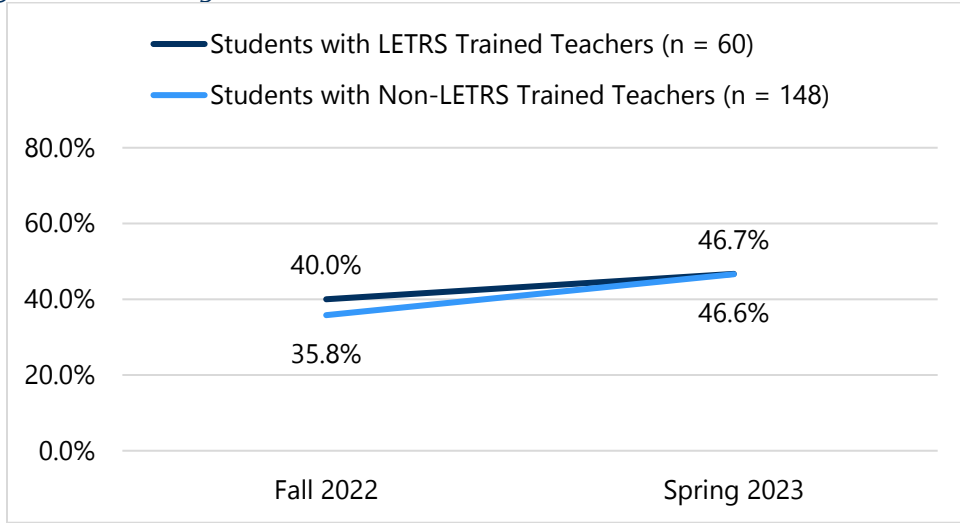
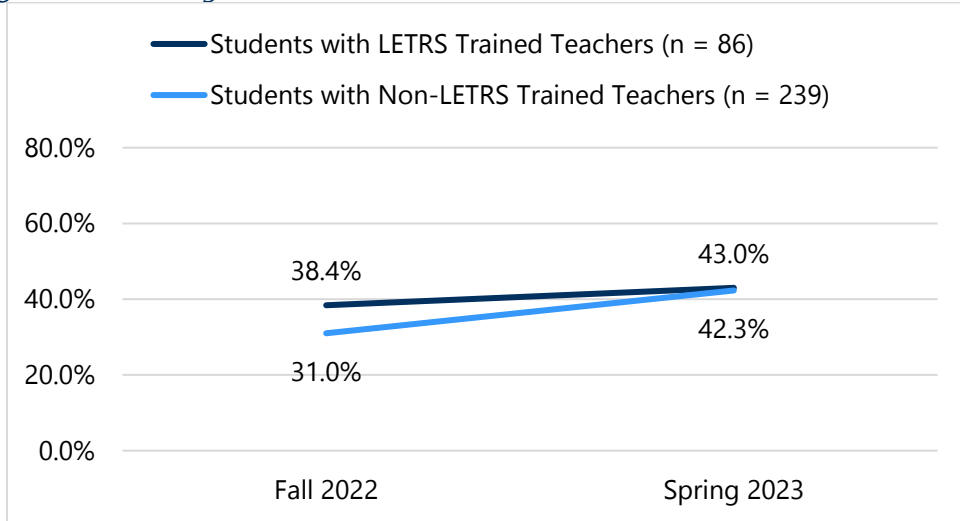


Figure 23. Percentage of Centennial 3rd Grade Students At/Above Benchmark on STAR



Fourth grade progress is presented below and shows that a higher number of students with LETRS trained teachers were at benchmark in the Fall and this continued into the Spring timepoint (Figure 24).

Figure 24. Percentage of Centennial 4th Grade Students At/Above Benchmark on STAR

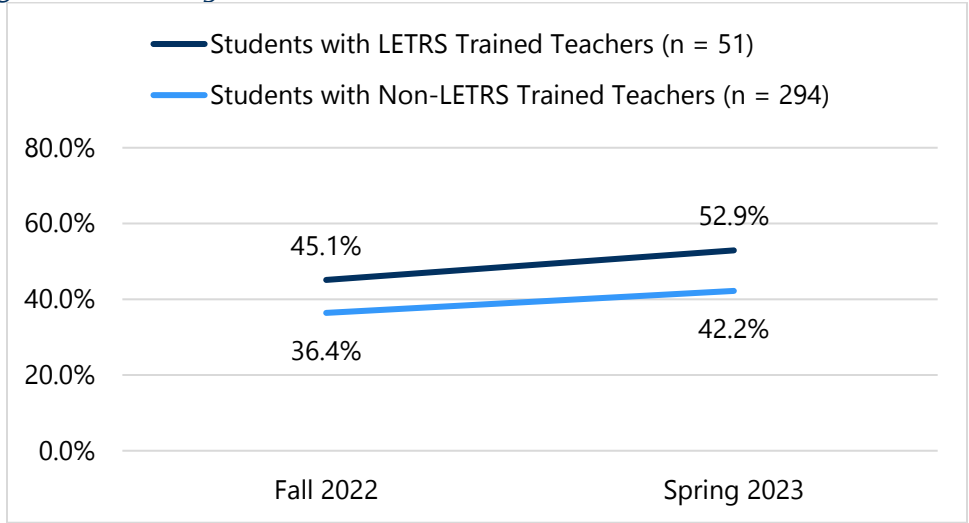
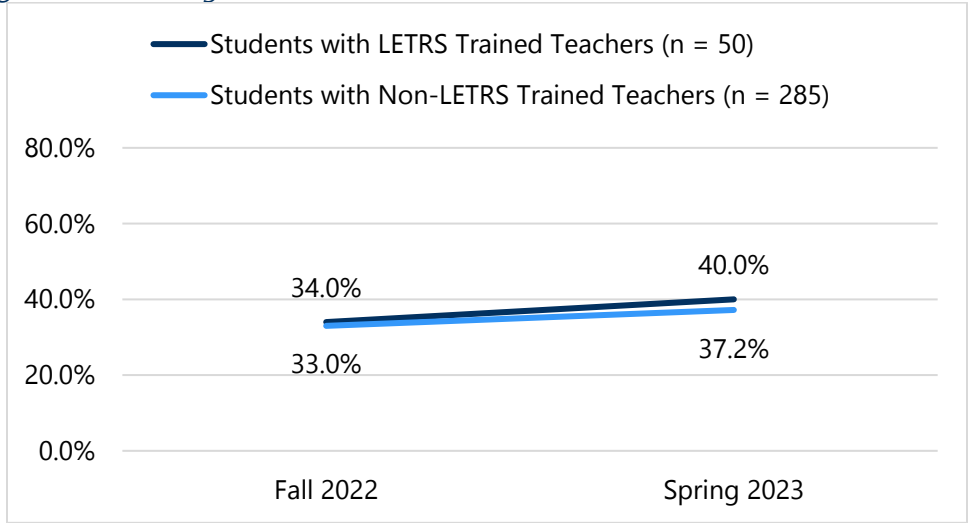


Figure 25 presents data from the STAR reading assessment and shows the rate of achieving a score of at/above benchmark on the STAR assessment was very similar at both timepoints regardless of whether students’ teachers were LETRS trained or not.

Figure 25. Percentage of Centennial 5th Grade Students At/Above Benchmark on STAR



## David Douglas School District

David Douglas School District used Acadience Reading, formerly DIBELS NEXT, as its primary literacy screener during the 2022-2023 school year. To examine the impact of LETRS training on student achievement, Acadience data were analyzed for students of LETRS trained teachers (treatment) compared to a group of students whose teacher did not participate in the LETRS training (comparison). LETRS-trained teachers included any educator at DDSD who had started the training and could be at any stage. The table below shows the progress of 64 DDSD educators and demonstrates that a large majority were on Volume 1 of the training.

Table 15. DDSD LETRS Participants' Progress on Training

Progress	% (n)
On Volume 1	85.9% (n = 55)
On Volume 2	12.5% (n = 8)
Completed	1.6% (n = 1)

Students' numeric scores were associated with four composite score categories: well below benchmark; below benchmark; at benchmark; and above benchmark. The percentage of students at or above benchmark on the Acadience Reading assessment were combined and compared at the two timepoints for the two groups of students.

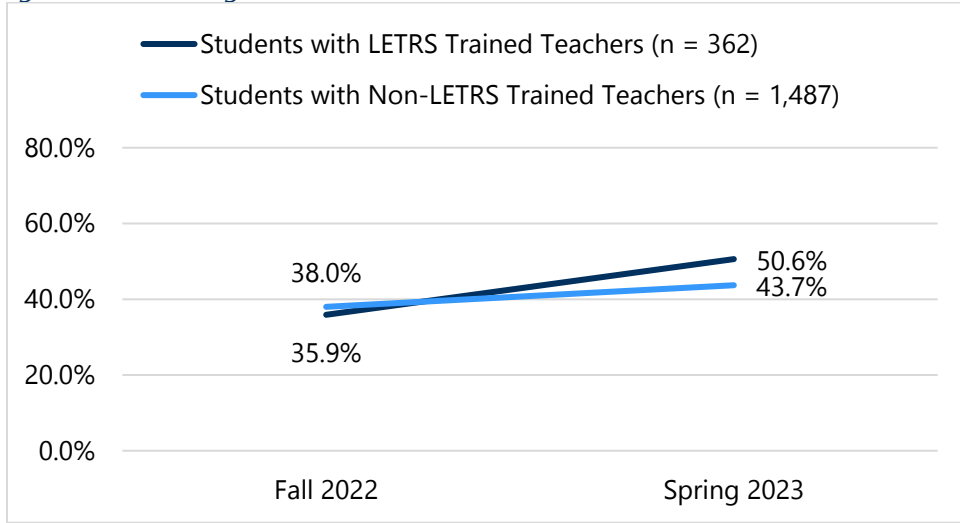
### Significant Achievement Results for DDSD

A series of logistic regressions were conducted to explore potential differences in Acadience scores between treatment (i.e., students with LETRS trained teachers) and comparison (i.e., students with non-LETRS-trained teachers) groups at Spring timepoints controlling for students' Fall Acadience scores. DDSD showed statistically significant findings for three of these analyses as detailed below:

- When considering grades K-5, students of LETRS trained teachers were **1.71 times more likely** to have a Spring reading composite score at or above benchmark compared to students of non-LETRS trained teachers.
- When considering ELL students in grades K-5, students of LETRS trained teachers were **2.67 times more likely** to have a Spring reading composite score at or above benchmark compared to ELL students of non-LETRS trained teachers.
- When considering Historically Underserved students in grade K-5, students of LETRS trained teachers were **1.51 times more likely** to have a Spring reading composite score at or above benchmark compared to HU students of non-LETRS trained teachers.

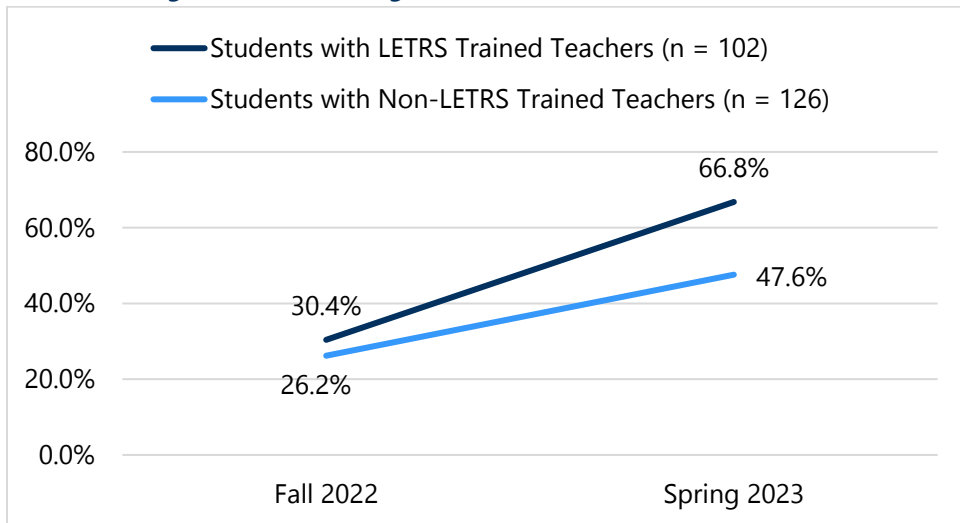
As shown below, the percentage of DDSD K-5 students performing at benchmark was roughly equal for LETRS trained vs. Non-LETRS trained teachers in the Fall and increased more for students of LETRS trained teachers than the comparison group by the Spring timepoint (Figure 26).

Figure 26. Percentage of DDS D K-5 Students At or Above Benchmark on Acadience



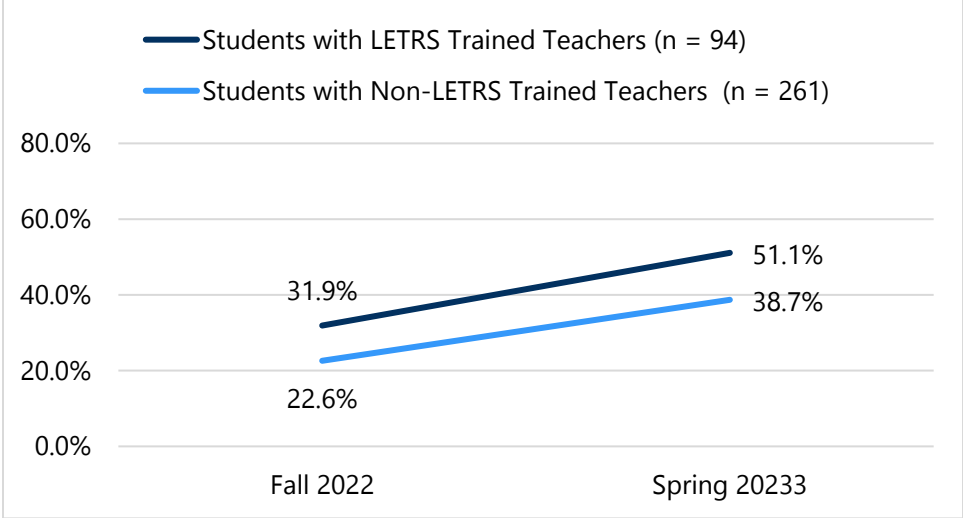
The next series of graphs will present the findings by grade level. Figure 27 shows that the percentage of kindergarten students performing at benchmark was just slightly lower for the comparison group in the Fall. By the Spring, the percentage of students reading at grade level was 19.2 percentage points higher for students of LETRS trained teachers.

Figure 27. Percentage of DDS D Kindergarten Students At or Above Benchmark on Acadience



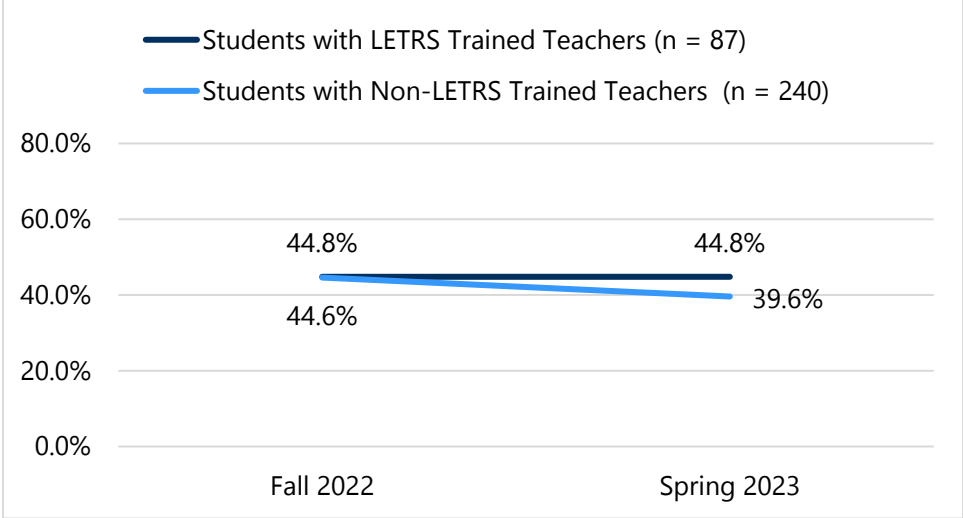
The percentage of first grade students performing at or above benchmark was lower for the comparison group in the Fall. By the Spring, the percentage of students reading at grade level was 12.4 percentage points higher for students of LETRS trained teachers. Figure 28).

Figure 28. Percentage of DDS D 1st Grade Students At or Above Benchmark on Acadience



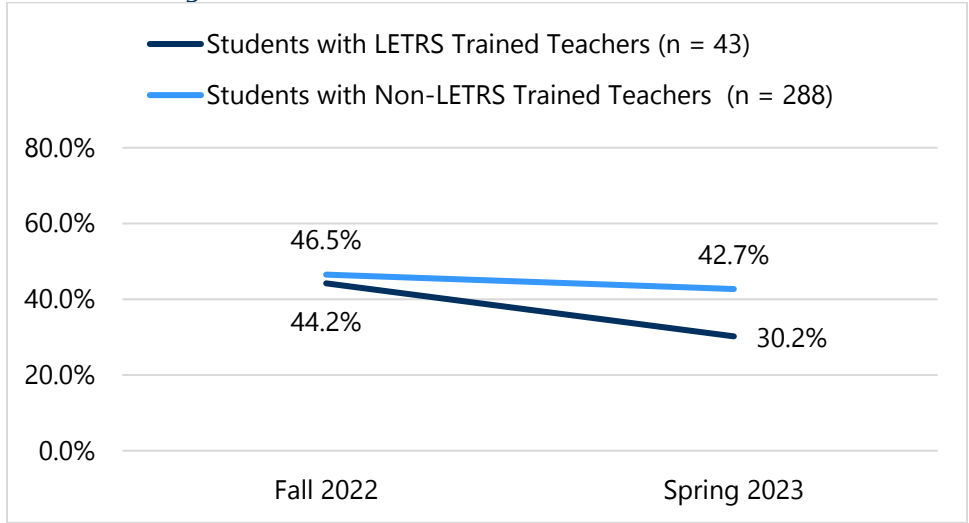
For second grade students in DDS D, the percentage of students performing at benchmark was the same for both groups in the Fall and decreased by 5% in the Spring for comparison group students Figure 29.

Figure 29. Percentage of DDS D 2nd Grade Students At or Above Benchmark on Acadience



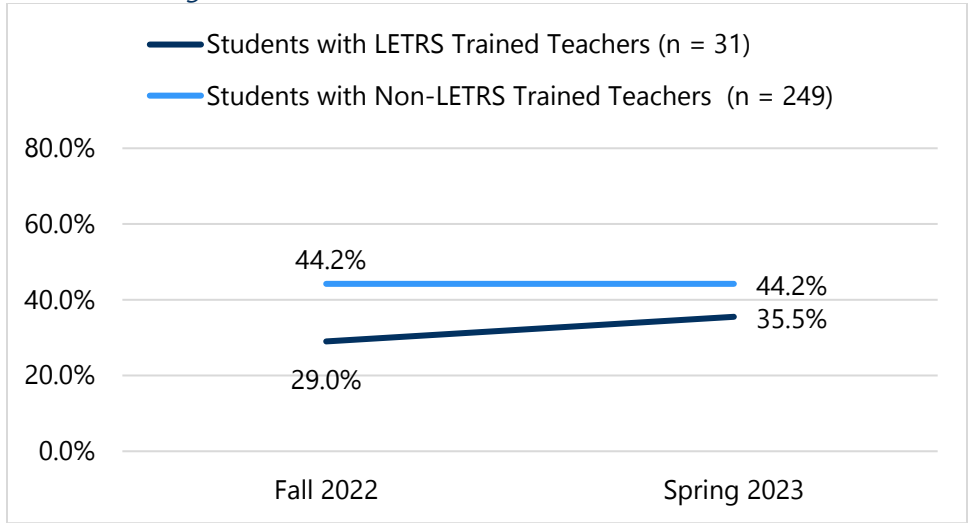
Third and fourth grade findings For third grade students in DDS D, the percentage of students performing at benchmark was about the same for both groups in the Fall and decreased by 14 percentage points in the Spring for treatment group students.

Figure 30. Percentage of DDSD 3rd Grade Students At or Above Benchmark on Acadience



For fourth grade students at DDSD, the percentage of students reading at grade level was 44.2% at both timepoints and increased from 29.0% to 35.5% for students of LETRS trained teachers.

Figure 31. Percentage of DDSD 4th Grade Students At or Above Benchmark on Acadience



## Parkrose School District

Parkrose School District used iReady reading as its primary literacy screener during the 2022-2023 school year. To examine the impact of LETRS training on student achievement, iReady data were analyzed for students of LETRS trained teachers (treatment) compared to a group of students whose teacher did not participate in the LETRS training (comparison). LETRS-trained teachers included any educator at Parkrose who had started the training and could be at any stage. The table below shows the progress of Parkrose educators and indicates that just over 60% of the 26 LETRS participants were on Volume 1 of the training.

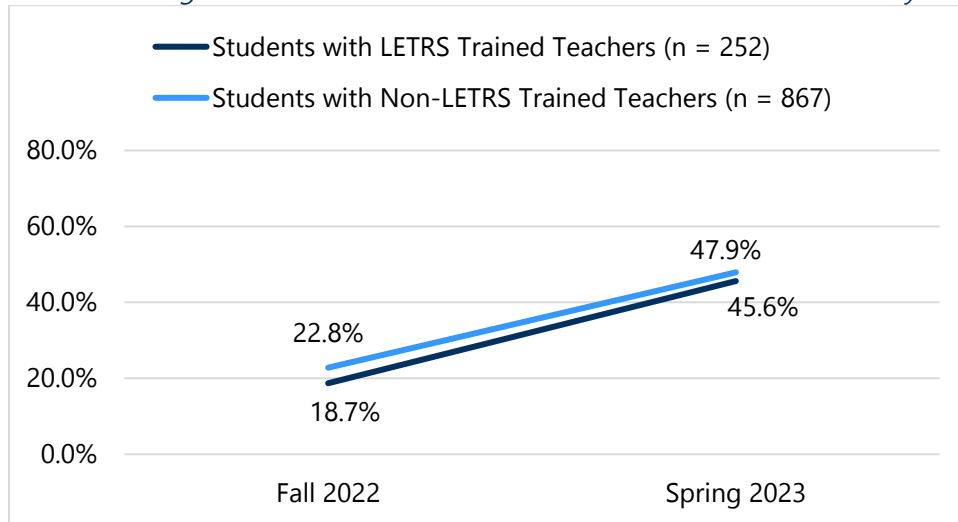
Table 16. Parkrose LETRS Participants' Progress on Training

Progress	% (n)
On Volume 1	61.5% (n = 16)
On Volume 2	26.9% (n = 7)
Completed	11.5% (n = 3)

Students' numeric scores were associated with five composite score categories: 1 grade level below, 2 grade levels below, 3 grade levels below, early on grade level, mid or above grade level. The percentage of students "early on grade level" or "mid or above grade level" for the iReady Reading assessment were combined and compared at the Fall and Spring timepoints for the two groups of students.

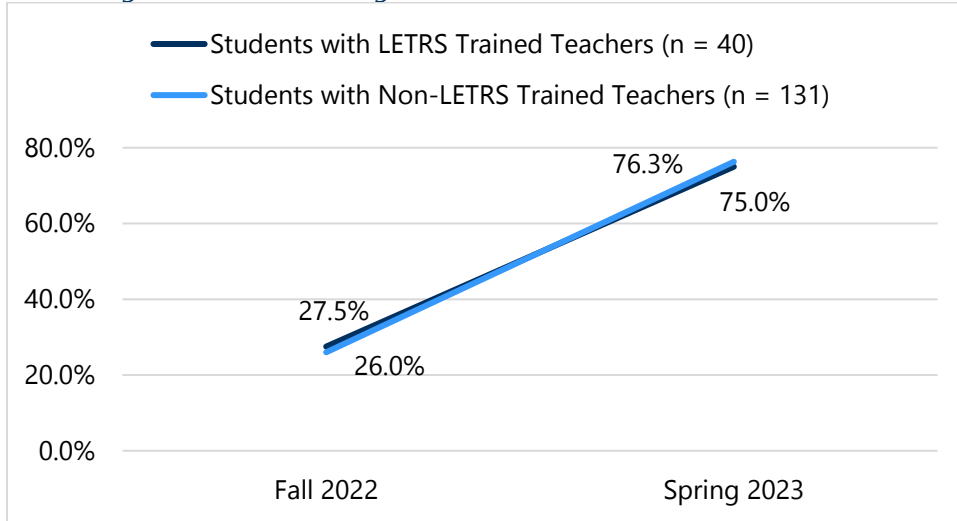
An analysis of iReady assessment data did not provide evidence of an overall impact of LETRS training on student reading achievement at Parkrose. As shown below, the percentage of Parkrose K-5 students performing at benchmark was roughly equal for LETRS trained vs. Non-LETRS trained teachers in the Fall and increased for both groups by the Spring timepoint (Figure 32).

Figure 32. Percentage of Parkrose K-5 Students At or Above Benchmark on iReady Reading



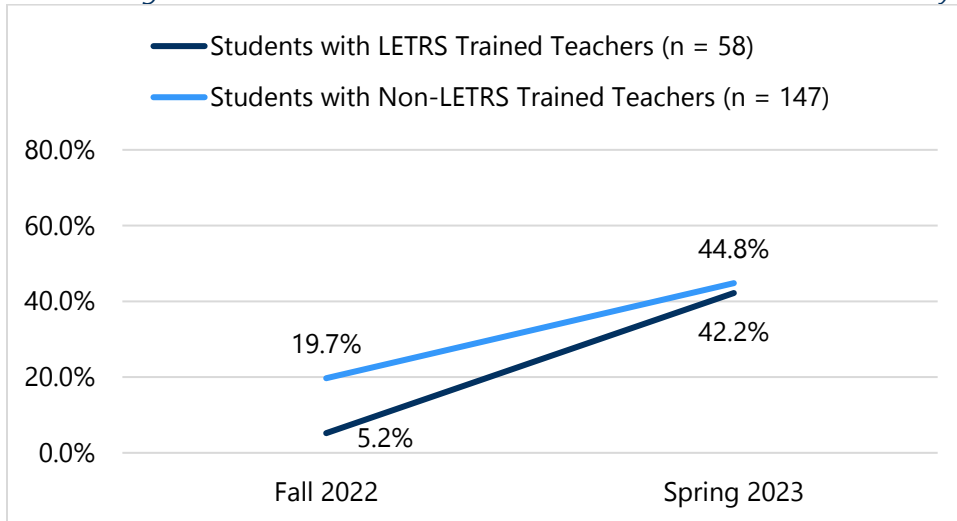
The next series of graphs will present the findings by grade level. Figure 33 shows that the percentage of kindergarten students performing at benchmark was nearly identical for students of LETRS trained teachers compared to non-LETRS trained teachers.

Figure 33. Percentage of Parkrose Kindergarten Students At or Above Benchmark on iReady Reading



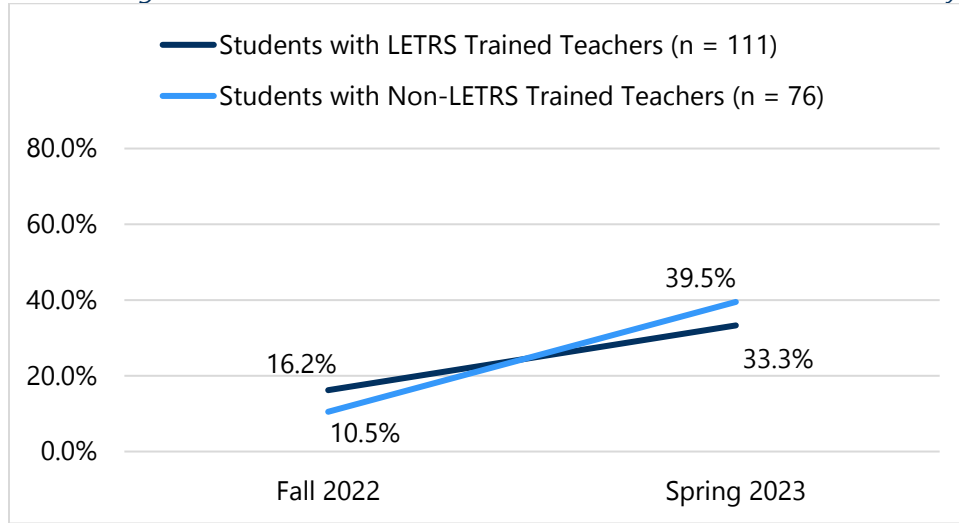
The percentage of first grade students performing at or above benchmark was lower for the treatment group in the Fall. By the Spring, the percentage of students reading at grade level had increased to 42.2% for treatment group students which was just slightly lower than the comparison group (Figure 34).

Figure 34. Percentage of Parkrose 1st Grade Students At or Above Benchmark on iReady Reading



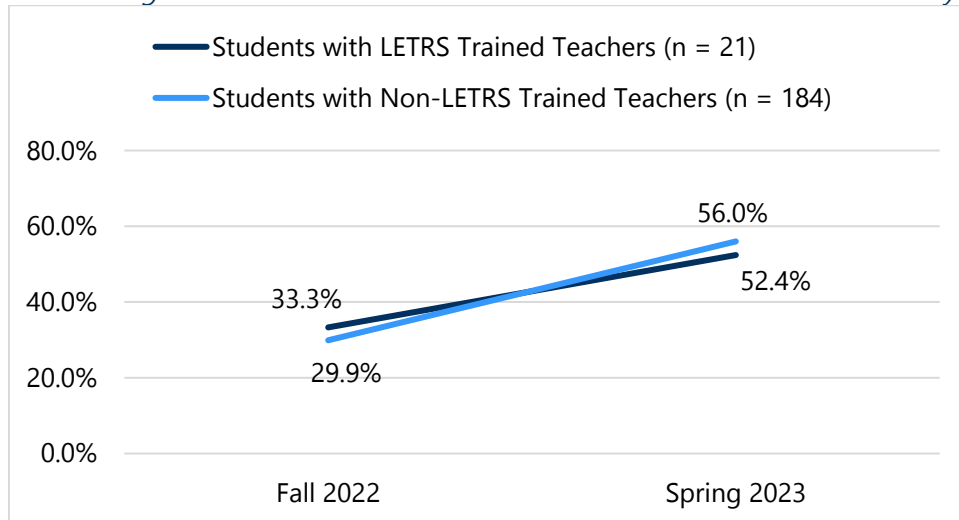
For second grade students in Parkrose, the percentage of students performing at benchmark was similar for both groups in the Fall and increased by more for comparison group students in the Spring (Figure 35).

Figure 35. Percentage of Parkrose 2nd Grade Students At or Above Benchmark on iReady Reading



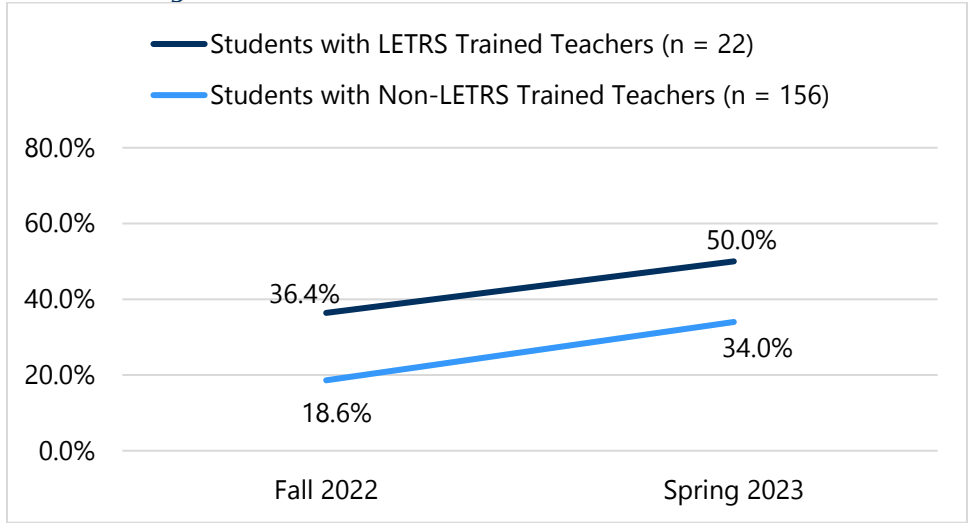
The number of 3<sup>rd</sup> grade students performing at benchmark in Parkrose was nearly identical for students of LETRS trained teachers compared to non-LETRS trained teachers.

Figure 36. Percentage of Parkrose 3rd Grade Students At or Above Benchmark on iReady Reading



Fourth grade students at Parkrose showed the most promising in the district but had the smallest sample size. By the Spring, 50.0% of students with LETRS trained teachers were reading at grade level compared to 34.0% of comparison group students. There were no iReady data for 5<sup>th</sup> grade students of LETRS trained teachers.

Figure 37. Percentage of Parkrose 4th Grade Students At or Above Benchmark on Acadience



## Portland Public Schools

Portland Public Schools used the DIBELS assessment as its primary literacy screener during the 2022-2023 school year. To examine the impact of LETRS training on student achievement, DIBELS composite performance indicators were analyzed for K-2 students of LETRS trained teachers (treatment) compared to a group of students whose teacher did not participate in the LETRS training (comparison).

LETRS-trained teachers included any K-2 educator at PPS who had started the training and could be at any stage. The table below shows the progress of PPS educators whose students were included in the analysis of achievement data.

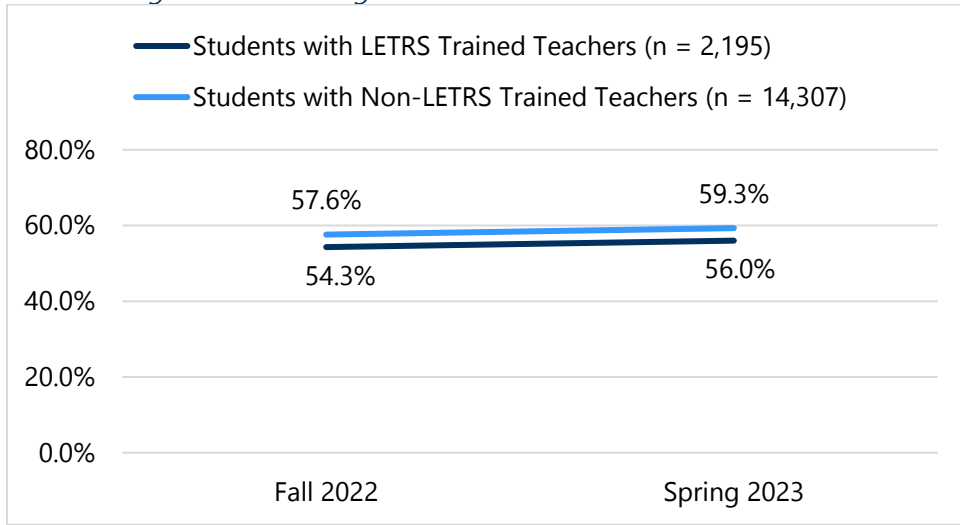
Table 17. PPS LETRS Participants' Progress on Training

Progress	% (n)
On Volume 1	36.8% (n = 39)
On Volume 2	39.6% (n = 42)
Completed	23.6% (n = 25)

Student scores on the assessment are associated with three benchmark categories: intensive support; strategic support; and core support. Those attaining core support scores are considered to be at or above grade level. The percentage of students at the core level on the DIBELS Reading assessment were compared at the two timepoints for the two groups of students.

An analysis of DIBELS assessment data did not provide evidence of an overall impact of LETRS training on student reading achievement in Portland Public Schools. As shown below, the percentage of PPS K-2 students performing at benchmark was similar for students of LETRS trained teachers and the comparison group at both Fall and Spring timepoints with the comparison group having slightly higher rates of students reading at grade level in both the Fall and Spring (Figure 38).

Figure 38. Percentage of PPS K-2 Students at Core on DIBELS



The next series of graphs will present the findings by grade level. As shown below, the percentage of kindergarten and 1<sup>st</sup> grade students performing at benchmark was nearly identical for students of LETRS trained teachers compared to non-LETRS trained teachers (Figure 39 and Figure 40).

Figure 39. Percentage of PPS Kindergarten Students at Core on DIBELS

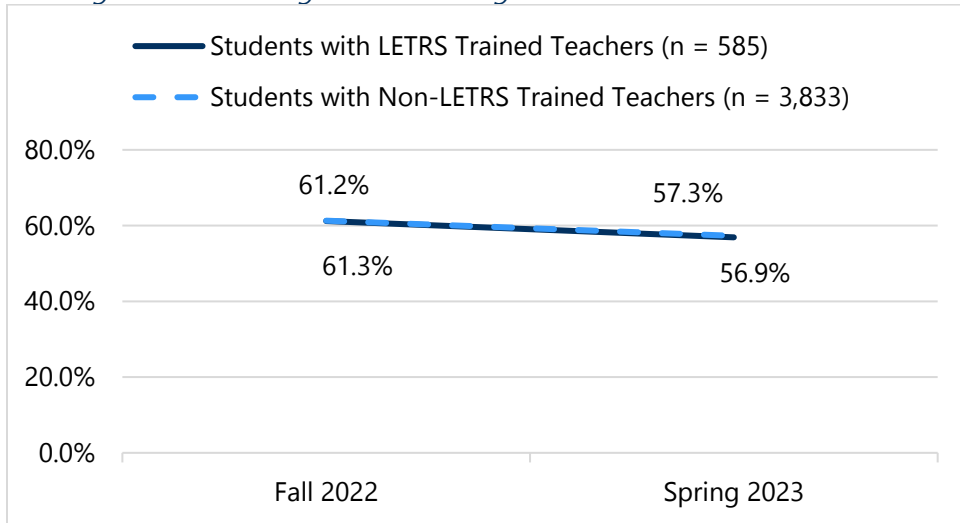
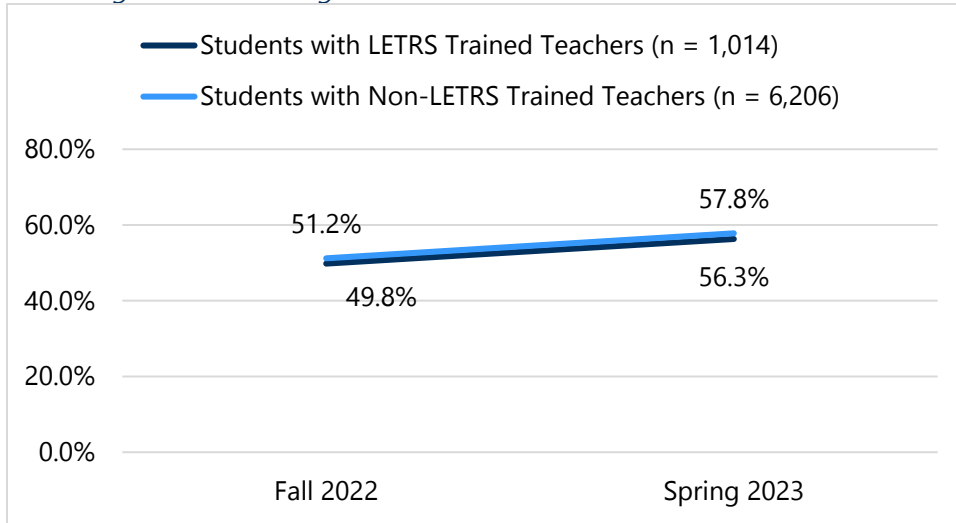
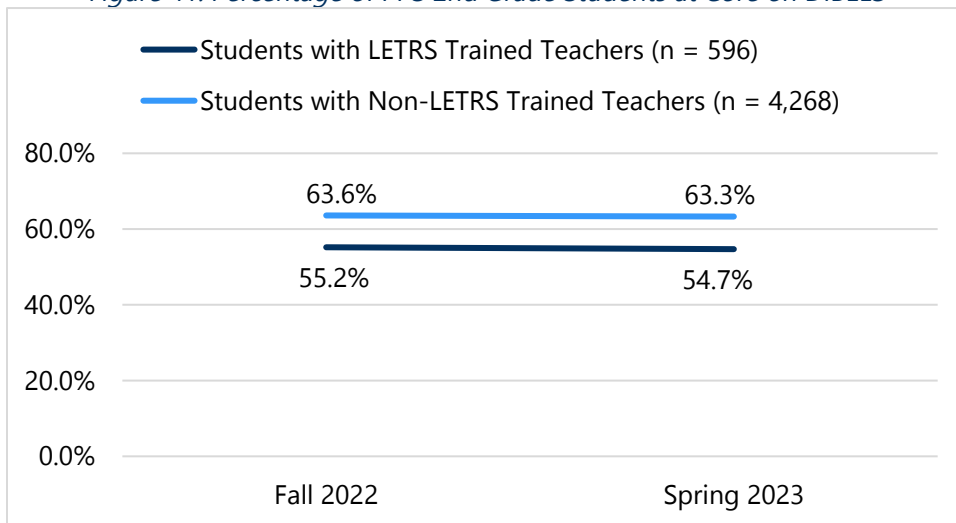


Figure 40. Percentage of PPS 1st Grade Students at Core on DIBELS



For second grade students in PPS, the percentage of students performing at benchmark was slightly higher for comparison group students than students of LETRS trained teachers at both Fall and Spring timepoints Figure 41.

Figure 41. Percentage of PPS 2nd Grade Students at Core on DIBELS



## Reynolds

Student outcomes on the DIBELS Reading assessment were examined for K-5 students at Reynolds School District to assess the impact of LETRS on students with teachers participating in the training (treatment) compared to those with teachers not participating in the training (comparison). Student scores on the assessment are associated with three benchmark categories: intensive support; strategic support; and core support. Those attaining core support scores are considered to be at or above grade level. The percentage

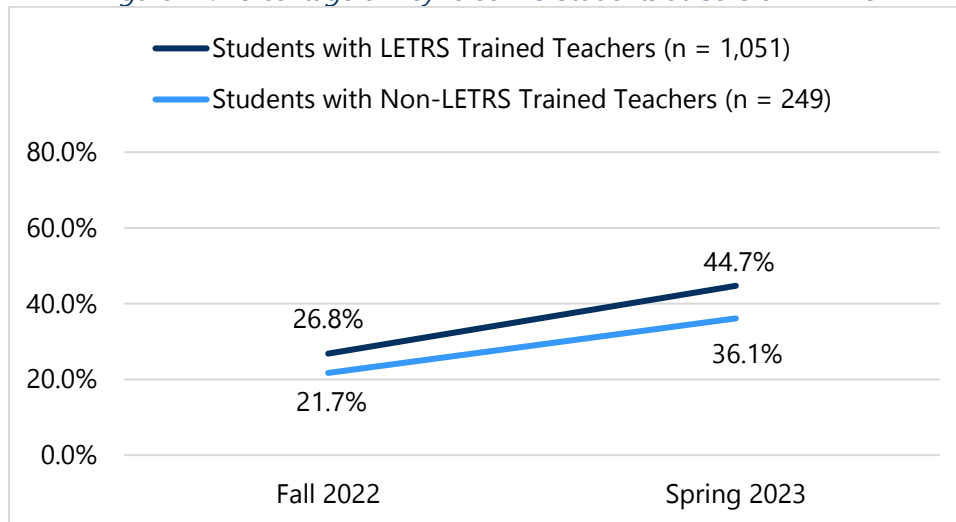
of students at the core level on the DIBELS Reading assessment were compared at the two timepoints for the two groups of students. LETRS-trained teachers included any educator at Reynolds who had started the training and could be at any stage. K-5 teachers with students who had data at both time points were included in the student achievement analysis. The table below shows the progress of Reynolds educators who were included in this analysis of achievement data.

*Table 18. Reynolds LETRS Participants' Progress on Training*

Progress	% (n)
On Volume 1	37.3% (n = 28)
On Volume 2	25.3% (n = 19)
Completed	37.3% (n = 28)

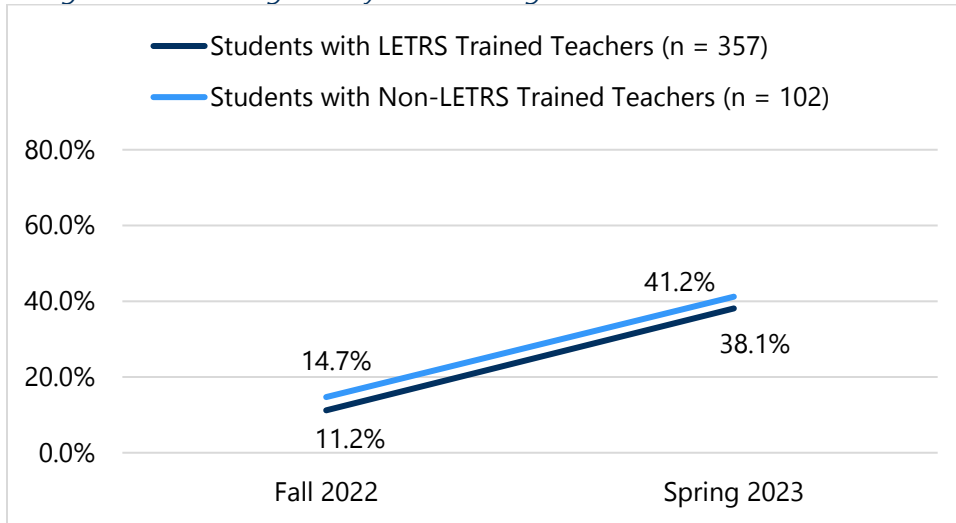
An analysis of Acadience assessment data **does** provide promising results regarding the impact of LETRS training on student reading achievement in RSD but this impact was not significant when examined through logistic regression analyses as described previously in this report. When looking at kindergarten through fifth grade students at Reynolds, treatment group students were reading at benchmark at higher rates than treatment group students at both the Fall and the Spring. The percentage students with LETRS trained teachers increased by more than the comparison group (Figure 42).

*Figure 42. Percentage of Reynolds K-5 Students at Core on DIBELS*



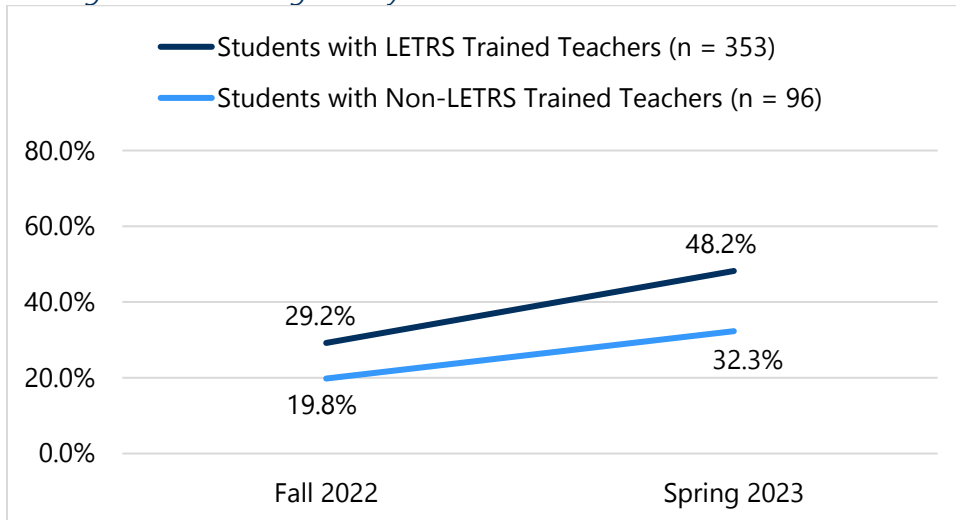
The percentage of kindergarten students at core on DIBELS was slightly higher for comparison group at both Fall and Spring timepoints (Figure 43). Both groups of students demonstrated a noteworthy increase in core attainment from Fall to Spring.

Figure 43. Percentage of Reynolds Kindergarten Students at Core on DIBELS



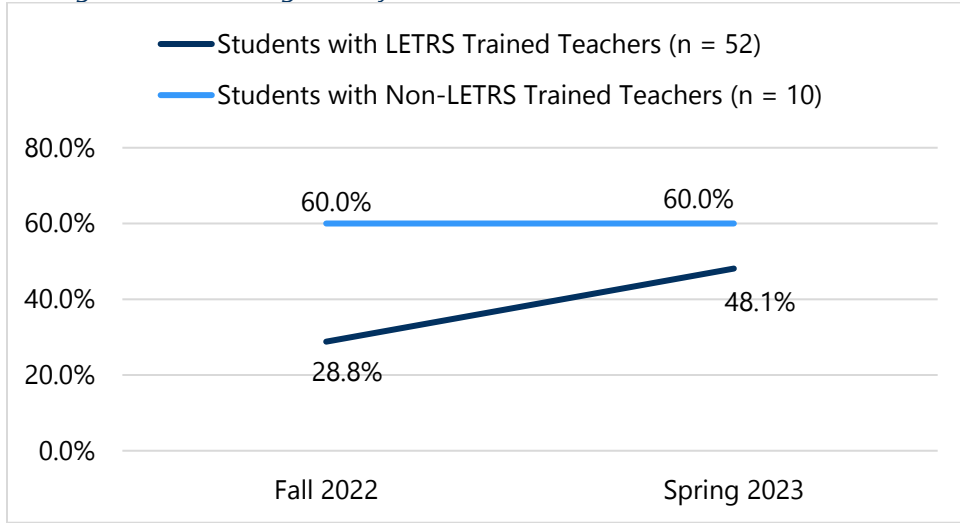
First grade students with LETRS trained teachers scored at the core level on DIBELS at higher rates at both timepoints than students whose teachers did not participate in LETRS. By the Spring, the percentage of students reading at grade level was 15.9 percentage points higher for students of LETRS trained teachers.

Figure 44. Percentage of Reynolds 1<sup>st</sup> Grade Students at Core on DIBELS



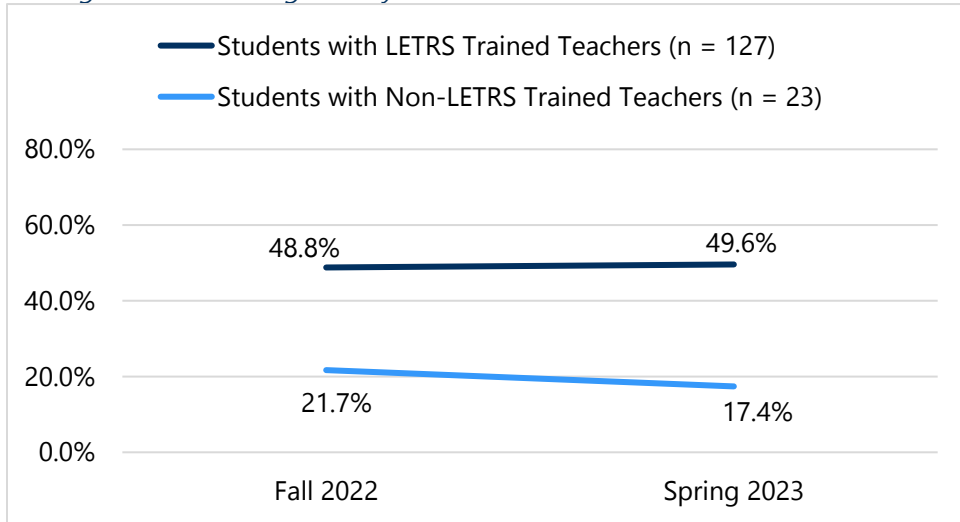
Although comparison group students were at the core on DIBELS at higher rates in the Spring compared to treatment group students, there was a noteworthy increase from Fall to Spring for these students with LETRS trained teachers; whereas, the comparison group's rate at achieving core remained steady (Figure 45).

Figure 45. Percentage of Reynolds 2nd Grade Students at Core on DIBELS



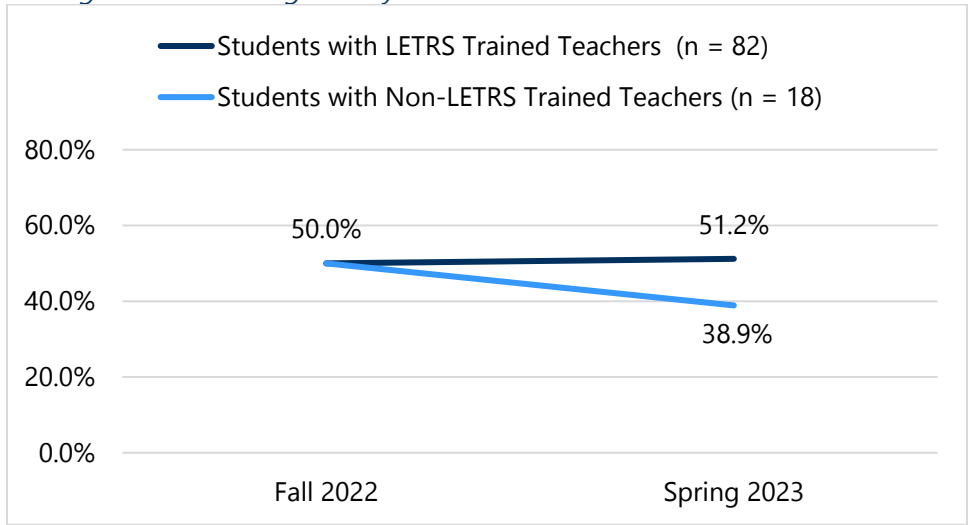
The rate of fourth grade treatment group students who were at core on DIBELS remained fairly steady across the two timepoints, while the comparison group decreased slightly. Notably, the percentage of fourth grade students reading at the core level was 32.2 percentage points higher for students of LETRS trained teachers in the Spring (Figure 46).

Figure 46. Percentage of Reynolds 4th Grade Students at Core on DIBELS



Half of the fifth grade students from both groups were at core on DIBELS in the Fall. While this rate increased very slightly for the treatment group, there was a noteworthy decrease for comparison group students from Fall to Spring (Figure 47).

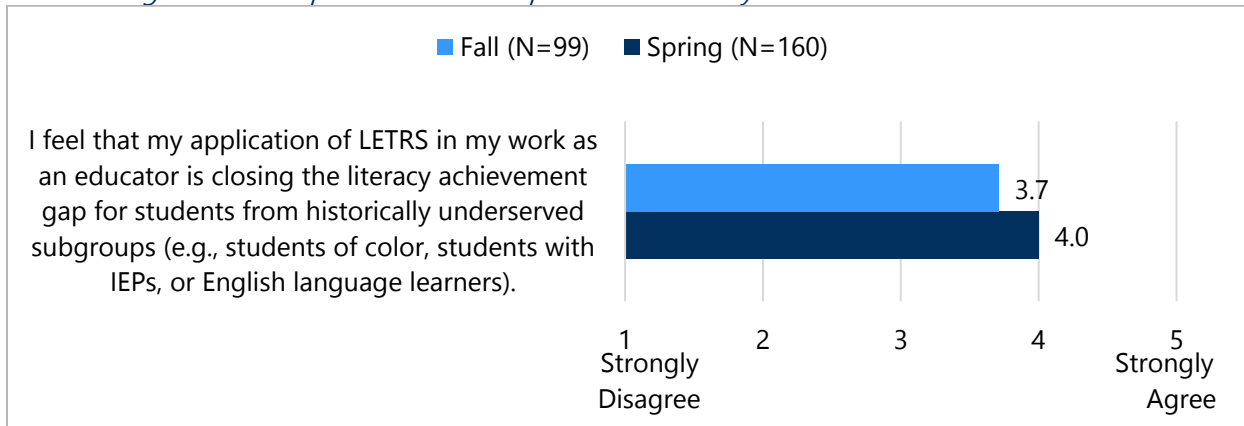
Figure 47. Percentage of Reynolds 5th Grade Students at Core on DIBELS



### What was the impact of LETRS training on students from historically underserved student subgroups?

On average, educators mostly agreed that their efforts to apply what they learned from LETRS into their work was helping to close the achievement gap for students from historically underserved backgrounds, such as students of color, those with individualized education plans (IEPs), and those who are English language learners. Educators were slightly more likely to agree with this statement at the Spring timepoint compared to the Fall, as shown in Figure 48.

Figure 48. Perceptions of LETRS Impact on Historically Underserved Student Outcomes



# Centennial School District

The rate of students at or above benchmark on the Acadience and at/above benchmark on the STAR assessment (depending on grade level) was examined for SPED and historically underserved race/ethnicity groups with LETRS trained teachers (treatment) and students with non-LETRS trained teachers (comparison) in Fall 2022 and Spring 2023.

The rate of SPED kindergarten and first grade students scoring at or above benchmark on the Acadience assessment decreased slightly from Fall to Spring for treatment group students while increasing for comparison group students (Figure 49).

Figure 49. Percentage of Centennial K-1 SPED Students At or Above Benchmark on Acadience

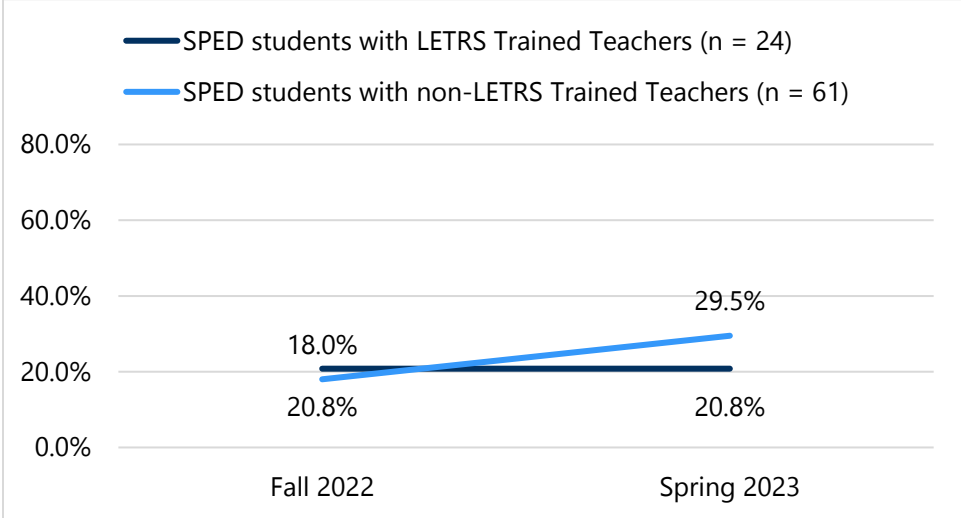
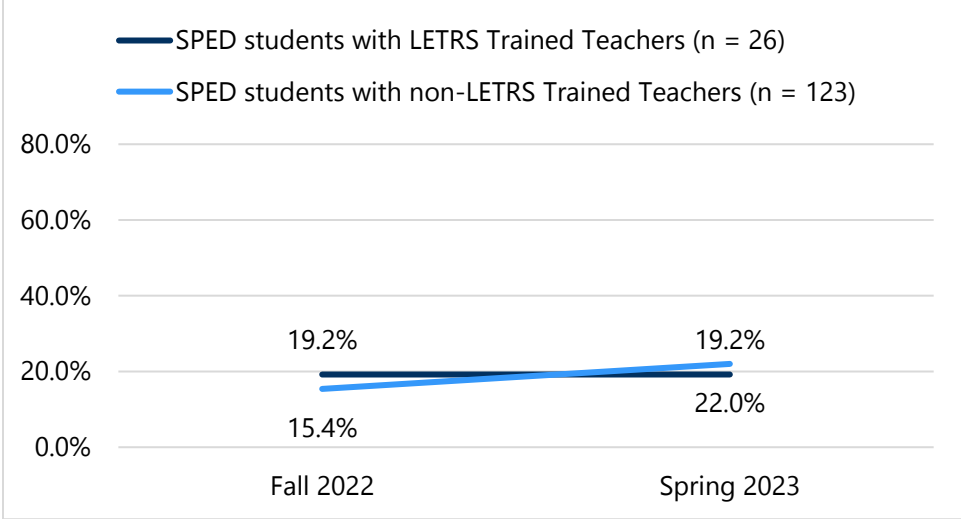


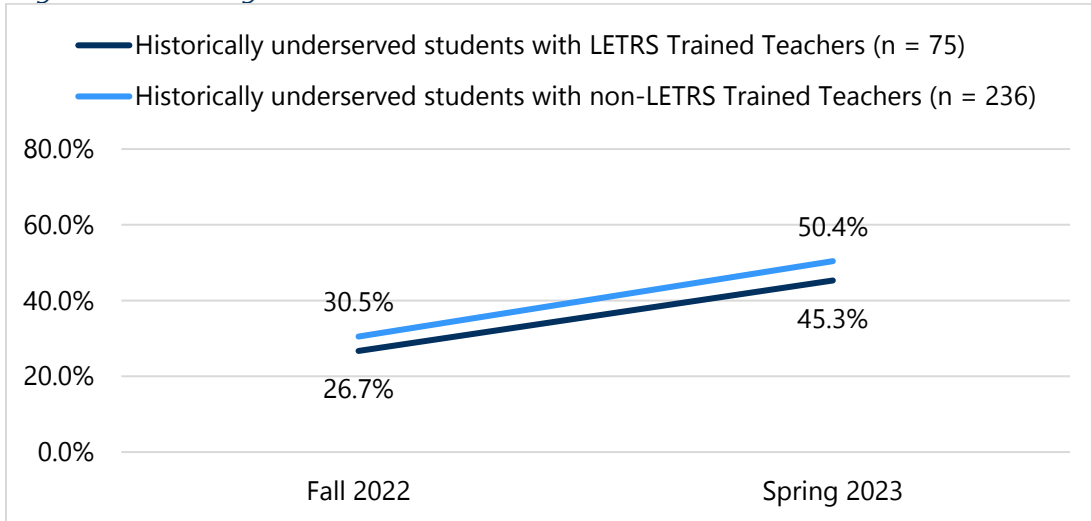
Figure 50 demonstrates that second through fifth grade SPED students in the treatment group achieved at/above benchmark scores on the STAR assessment at the same rate at both timepoints; whereas, there was a slight increase in scoring at/above benchmark for treatment group students from Fall to Spring.

Figure 50. Percentage of Centennial 2-5 SPED Students At or Above Benchmark on STAR



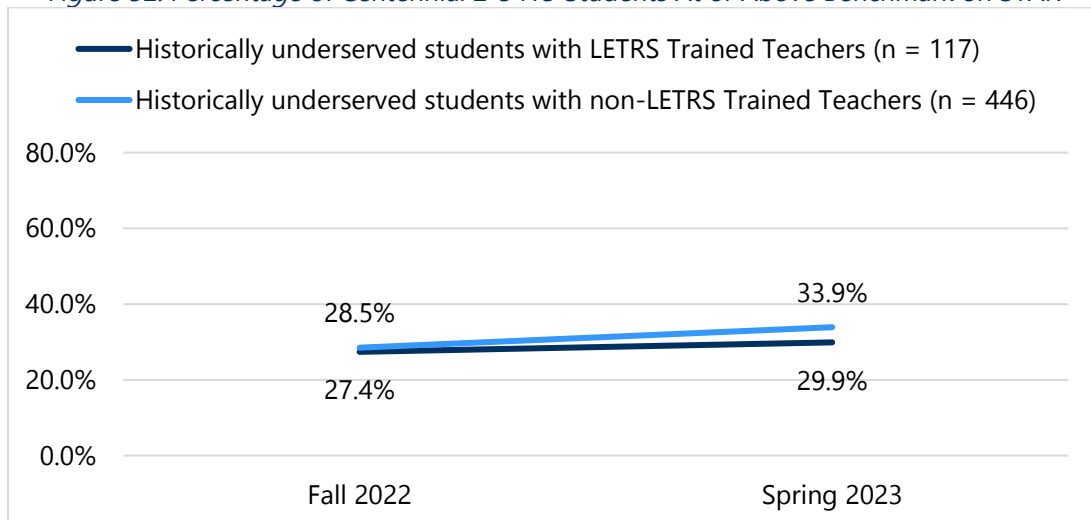
When looking at Acceince scores for kindergarten and first grade students from historically underserved race/ethnicity groups, comparison group slightly outperformed treatment group students at both timepoints (Figure 51).

*Figure 51. Percentage of Centennial K-1 HU Students At or Above Benchmark on Acadience*



While the rate of second through fifth grade students from historically underserved race/ethnic groups scoring at/above benchmark was about the same in the Fall for students regardless of whether their teacher was participating in LETRS, the comparison group slightly outpaced the treatment group in the Spring (Figure 52).

*Figure 52. Percentage of Centennial 2-5 HU Students At or Above Benchmark on STAR*

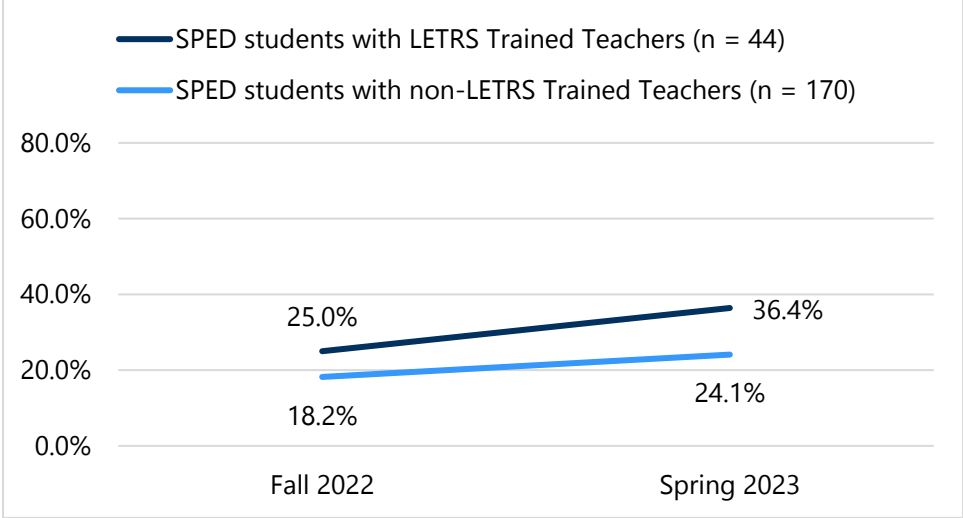


# David Douglas School District

The percent of students at or above benchmark on the Acadience assessment was examined for SPED, ELL, and historically underserved race/ethnicity groups with LETRS trained teachers (treatment) and students with non-LETRS trained teachers (comparison) in Fall 2022 and Spring 2023.

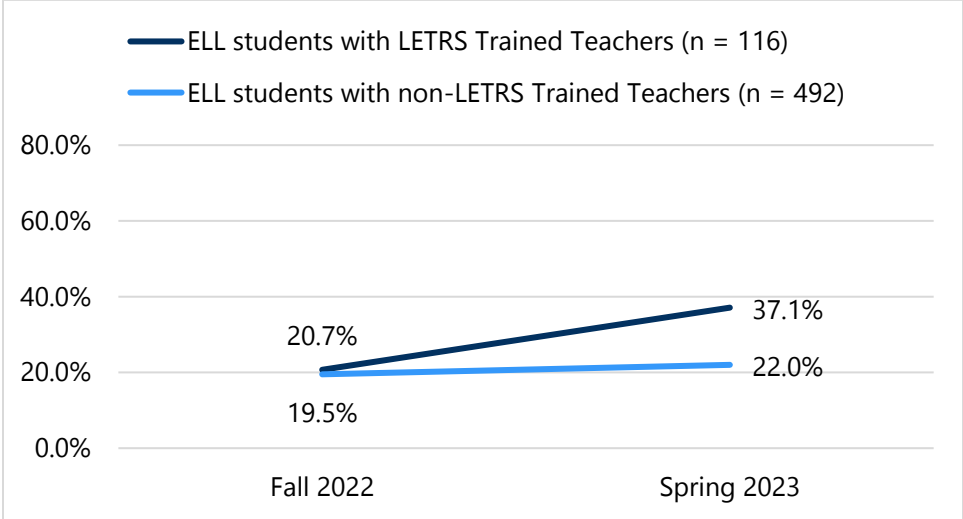
The percentage of SPED students reading at or above benchmark in grade K-5 at DDS D was slightly higher for students of LETRS trained teachers in the Fall and increased by 16.4% by the Spring (Figure 53).

Figure 53. Percentage of DDS D K-5 SPED Students At or Above Benchmark on Acadience



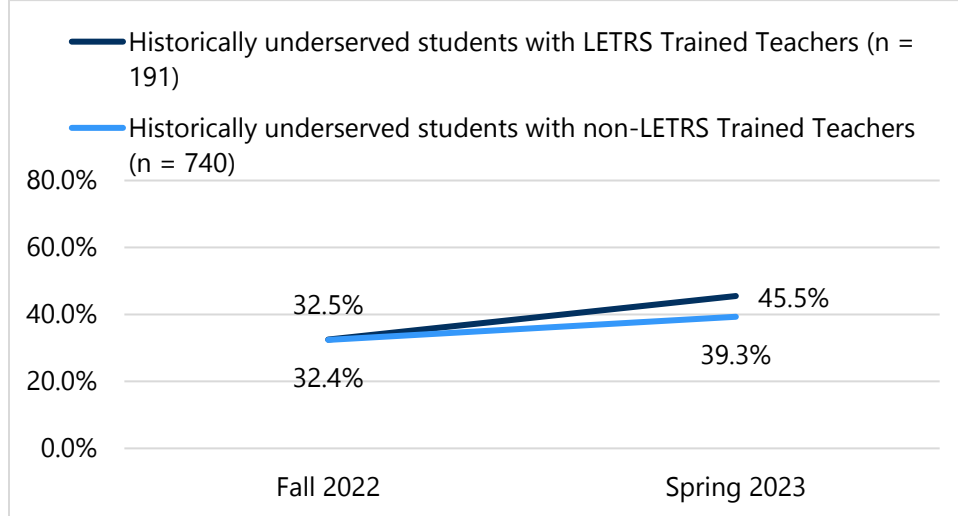
Acadience scores were examined for English Language Learners in grades K-5 in DDS D. The percentage of ELL students with LETRS trained teachers was similar to the comparison group in the Fall but increased by 16.4 percentage points in the Spring (Figure 54).

Figure 54. Percentage of DDS D K-5 ELL Students At or Above Benchmark on Acadience



Finally, Acadience scores were examined for Historically Underserved race/ethnicities in grades K-5 in DDSD. Similar to English Language Learners the percentage of HU students with LETRS trained teachers was similar to the comparison group in the Fall but increased by 13 percentage points in the Spring. (Figure 55).

Figure 55. Percentage of DDSD K-5 HU Students At or Above Benchmark on Acadience

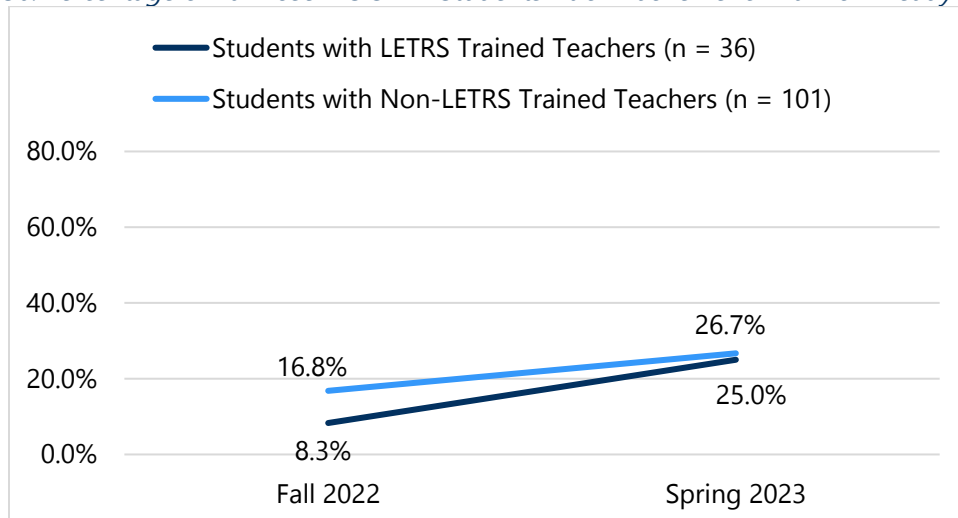


## Parkrose School District

The percent of students at or above benchmark on the iReady reading assessment was examined for SPED, ELL, and historically underserved race/ethnicity groups with LETRS trained teachers (treatment) and students with non-LETRS trained teachers (comparison) in Fall 2022 and Spring 2023.

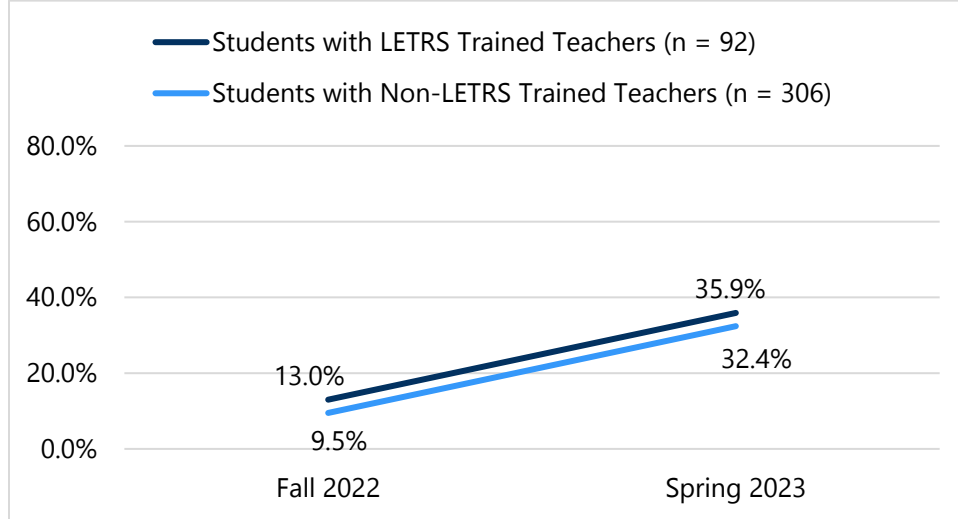
The percentage of SPED students reading at or above benchmark in grade K-5 at Parkrose was slightly higher for comparison students in the Fall but was nearly equal by the Spring timepoint. (Figure 56).

Figure 56. Percentage of Parkrose K-5 SPED Students At or Above Benchmark on iReady Reading



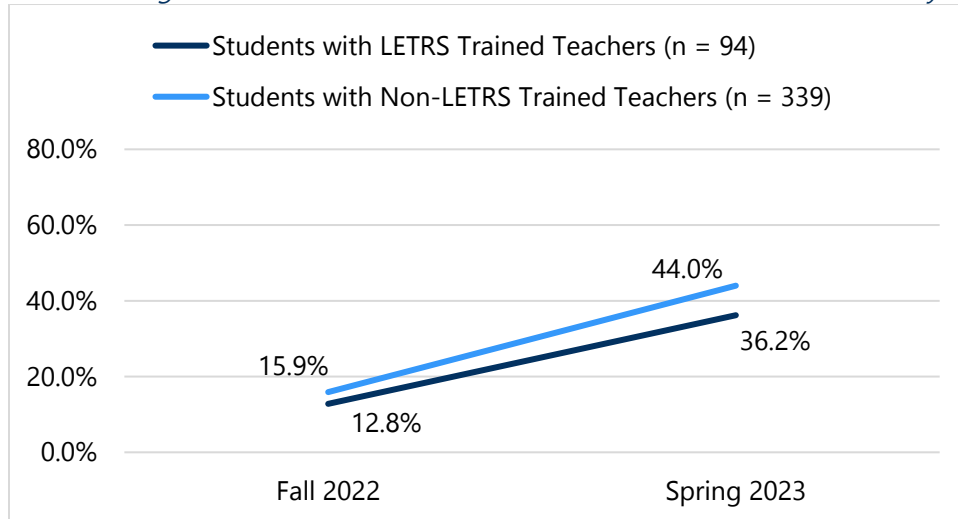
iReady reading scores were examined for English Language Learners in grades K-5 in Parkrose. The percentage of ELL students with LETRS trained teachers was slightly higher than the comparison group at both timepoints (Figure 57).

Figure 57. Percentage of Parkrose K-5 ELL Students At or Above Benchmark on iReady Reading



Finally, iReady scores were examined for Historically Underserved race/ethnicities in grades K-5 in Parkrose. Although both groups started out with about the same percentage of HU students reading at grade level in the Fall, the comparison group had a slightly higher number at the Spring timepoint.

Figure 58. Percentage of Parkrose K-5 HU Students At or Above Benchmark on iReady Reading

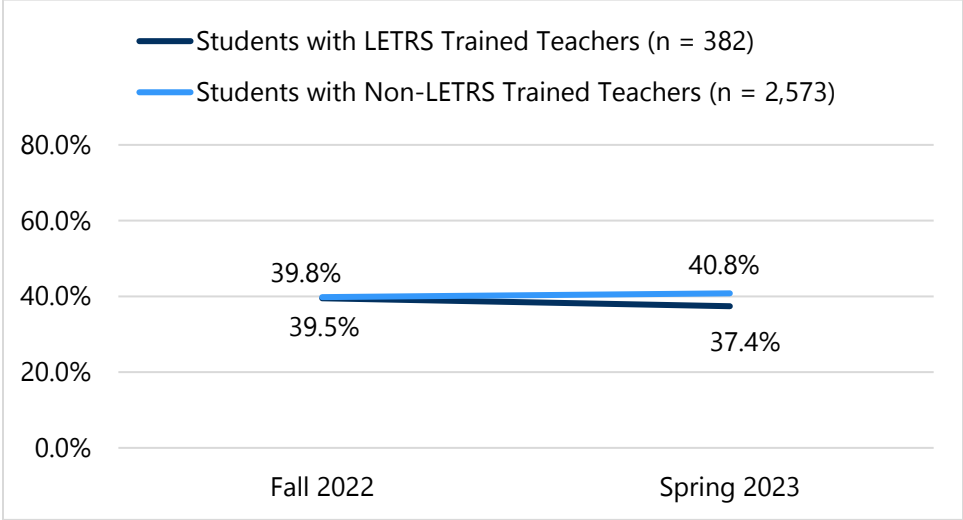


# Portland Public Schools

The percent of students at or above benchmark on the DIBELS reading assessment was examined for SPED, ELL, and historically underserved race/ethnicity groups with LETRS trained teachers (treatment) and students with non-LETRS trained teachers (comparison) in Fall 2022 and Spring 2023.

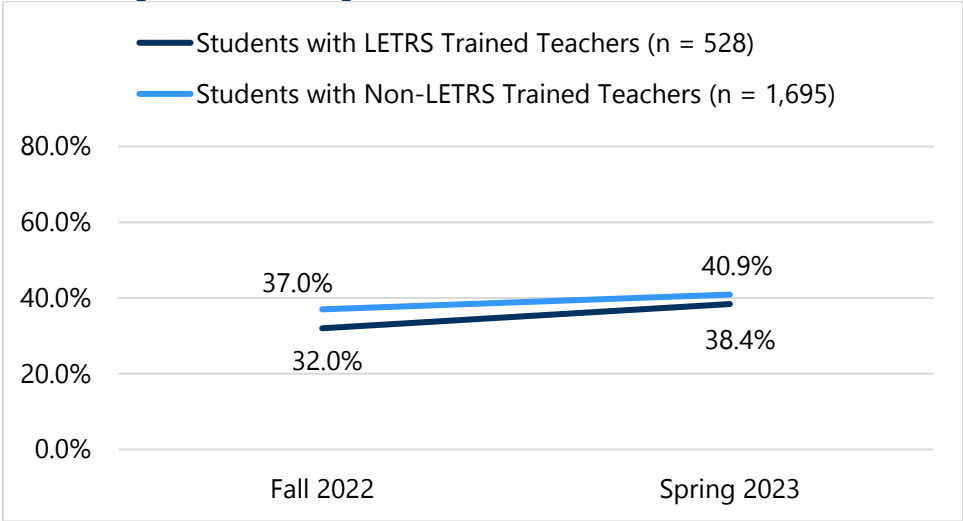
The percentage of SPED students reading at or above benchmark in grade K-5 at PPS was nearly identical for comparison students in the Fall and Spring timepoints (Figure 59).

Figure 59. Percentage of PPS SPED Students at Core on DIBELS



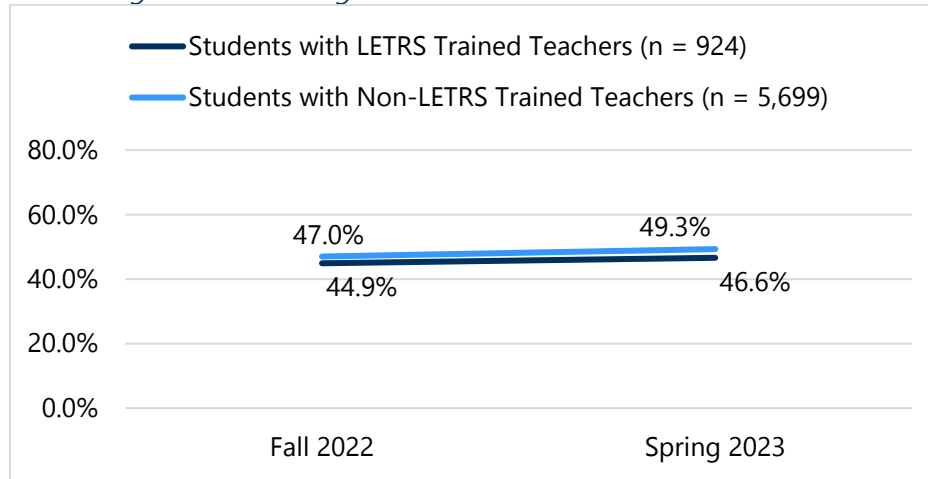
DIBELS reading scores were examined for English Language Learners in grades K-2 in PPS. The percentage of ELL students reading at benchmark in the comparison group was slightly higher than the LETRS group at both timepoints. (Figure 60).

Figure 60. Percentage of PPS K-2 ESL Students Core on DIBELS



Finally, DIBELS scores were examined for Historically Underserved race/ethnicities in grades K-2 in PPS. The percentage of students reading at benchmark was nearly identical regardless of the LETRS training.

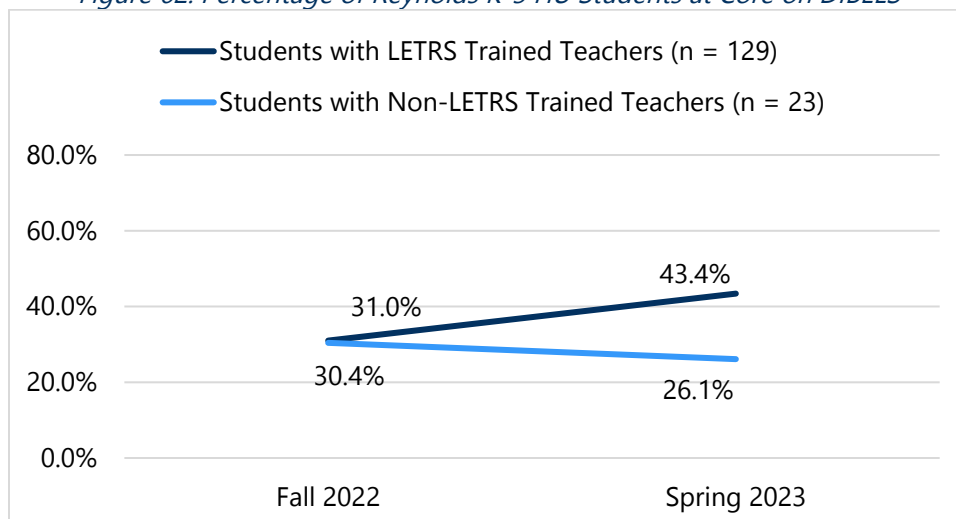
Figure 61. Percentage of PPS K-2 HU Students Core on DIBELS



## Reynolds School District

The percent of students at the core level on the DIBELS reading assessment was examined for historically underserved race/ethnicity groups with LETRS trained teachers (treatment) and students with non-LETRS trained teachers (comparison) in Fall 2022 and Spring 2023. The figure below illustrates that while students from both groups scored at the core level at similar rates in the Fall, treatment group rates increased from Fall to Spring and comparison group rates decreased. By Spring, the percentage of historically underserved students reading at grade level was 17.3 percentage points higher for students of LETRS trained teachers. These findings were further explored through logistic regression analysis and showed that students of historically underserved race/ethnicity groups with LETRS trained teachers were 7.54 times more likely to have a Spring reading composite score at or above benchmark compared to HU students of non-LETRS trained teachers.

Figure 62. Percentage of Reynolds K-5 HU Students at Core on DIBELS



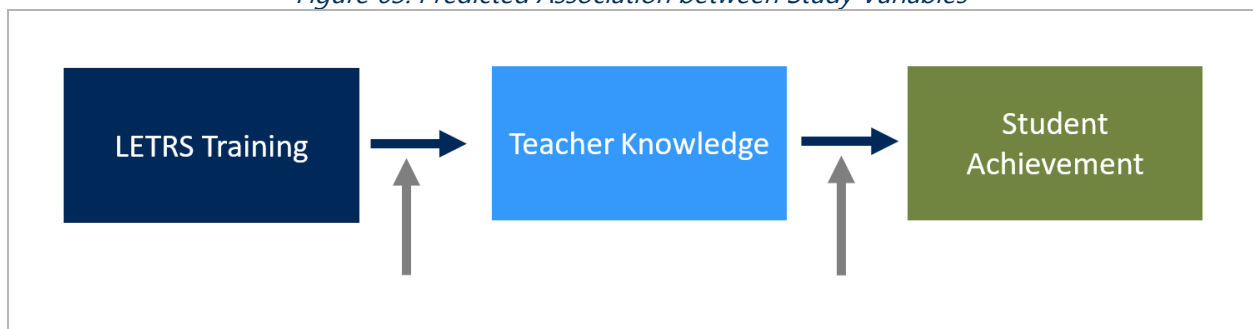
# PPS SUPPLEMENTAL STUDY FINDINGS

## Study Design

Previous research on the impact of LETRS training suggests a positive association between LETRS training and teacher knowledge, and also a positive association between teacher knowledge and student reading outcomes.<sup>4</sup> The direct relationship between LETRS training and student reading outcomes has been hypothesized, but has remained somewhat elusive to researchers (for more information on the body of research surrounding LETRS, see the literature review prepared by PRE which helped to inform this study). This supplemental study sought to explore the connection between LETRS training, teacher knowledge, and student achievement, using a sample of LETRS trained and non-LETRS trained PPS teachers.

The predicted association between LETRS training, teacher knowledge, and student achievement is graphically displayed in Figure 63. The blue arrows in the model represent the predicted association between these main variables of interest, while the grey arrows represent potential moderating effects that could influence the main effects. Moderators that were measured and are discussed in the findings that follow include teacher beliefs about code-based and meaning-based instructional styles, and aspects of teacher's experiences such as their educational background.

*Figure 63. Predicted Association between Study Variables*



## Methods

Participation in this supplemental study was limited to only PPS educators to control for potentially confounding district-level factors, and because PPS could offer an adequately large sample of both LETRS trained and non-LETRS-trained educators. An online survey administered in the Spring of 2023 was used to assess teacher knowledge and beliefs regarding reading instruction. Teacher knowledge was measured using a 37 item Knowledge of Basic Language Constructs<sup>5</sup> instrument, which focused on phonological and

<sup>4</sup> Garet, M. S., Cronen, S., Eaton, M., Kurki, A., Ludwig, M., Jones, W., ... & Szejnberg, L. (2008). The Impact of Two Professional Development Interventions on Early Reading Instruction and Achievement. NCEE 2008-4030. National Center for Education Evaluation and Regional Assistance.

<sup>5</sup> Binks-Cantrell, E., Joshi, R. M., & Washburn, E. K. (2012). Validation of an instrument for assessing teacher knowledge of basic language constructs of literacy. *Annals of dyslexia*, 62, 153-171.

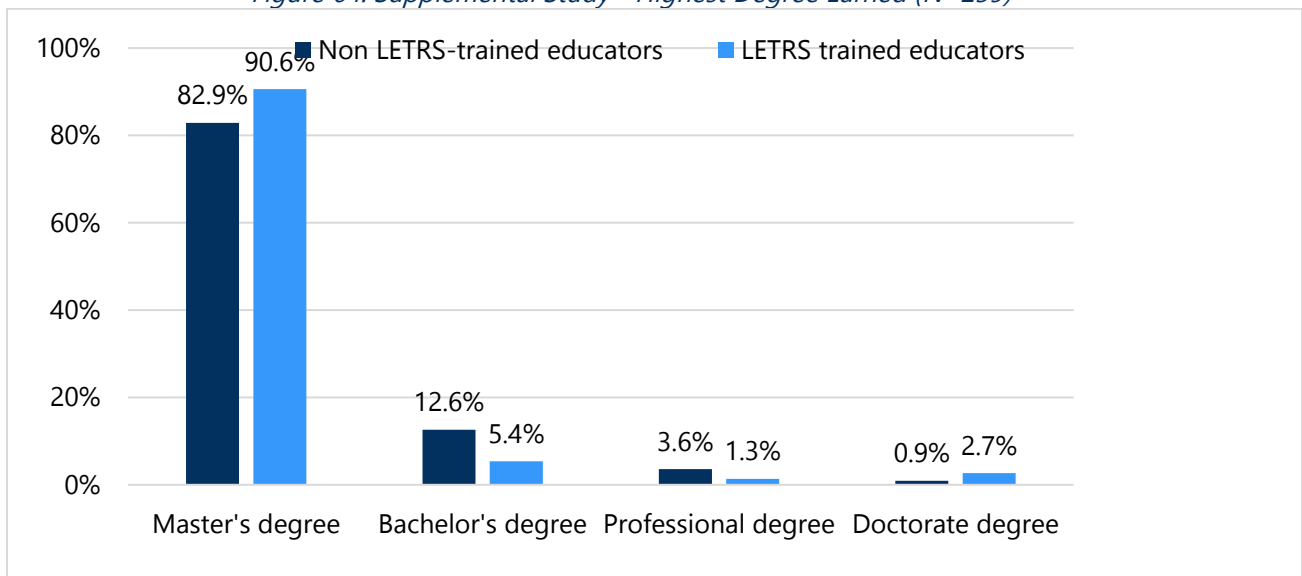
decoding knowledge and skill. All items on the knowledge measure were coded as either correct or incorrect, and averaged to produce a percent correct teacher knowledge score. The Teacher Beliefs Survey<sup>6</sup> was used to measure beliefs about both code-based (i.e., more aligned with phonics and the science of reading) and meaning-based (i.e., more aligned with whole language approaches) literacy instruction, using a 6-point scale from strongly disagree (coded as 1) to strongly agree (coded as 6). The survey also asked teachers about their educational background, and whether they had participated in LETRS training (and if so, how far they had progressed). Student achievement in this supplemental study was considered at the teacher-level. Each participating teacher who had students with available Fall 2022 and Spring 2023 assessment data was measured on the percent of students at or above benchmark (i.e., Core Support or above according to DIBELS) at both timepoints.

PPS Supplemental Study Survey Respondents

Participants (N=261) included educators who had been exposed to LETRS training (n=150), as well as a control group of educators who had not yet had any LETRS training (n=111). Participants were able to skip questions and/or exit the survey before completing all aspects. Therefore, the number of responses that findings are based on throughout this section will vary and will be noted.

All educators worked with students in the kindergarten through fifth grade range. Of educators who indicated their primary role (N=259), most were classroom teachers (61.0%) followed by speech language pathologists (10.0%) and instructional specialists (7.3%). Of educators who shared their highest degree earned (N=260), the large majority of both the LETRS trained group (90.6%) and the control group (82.9%) held master’s degrees (see Figure 64).

Figure 64. Supplemental Study - Highest Degree Earned (N=259)

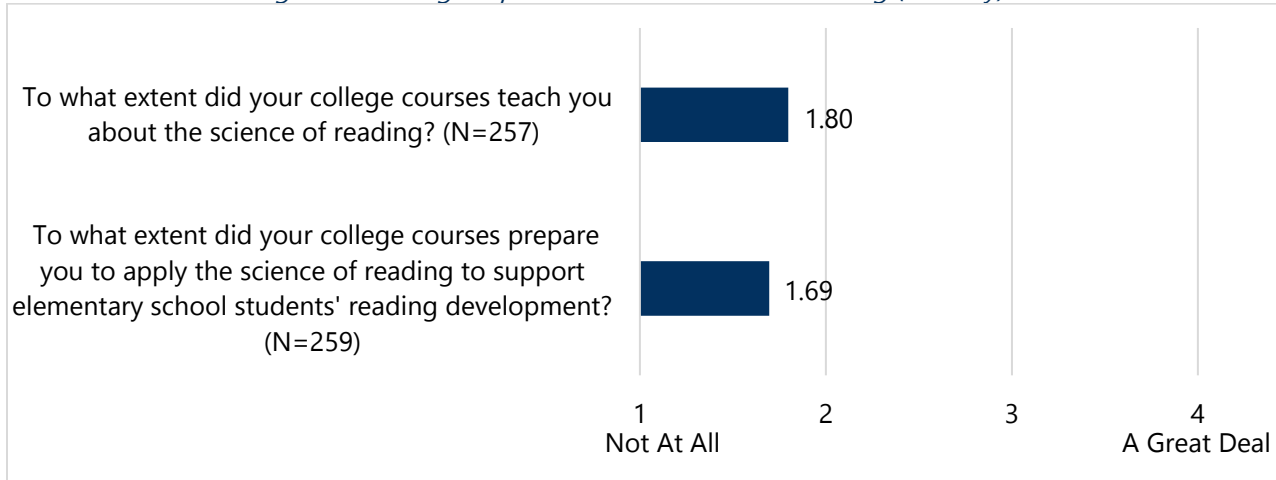


<sup>6</sup> Bills, B. (2020). Teacher Knowledge, Beliefs, and instructional practices in early literacy: a comparison study. University of Nebraska at Omaha.

## Findings

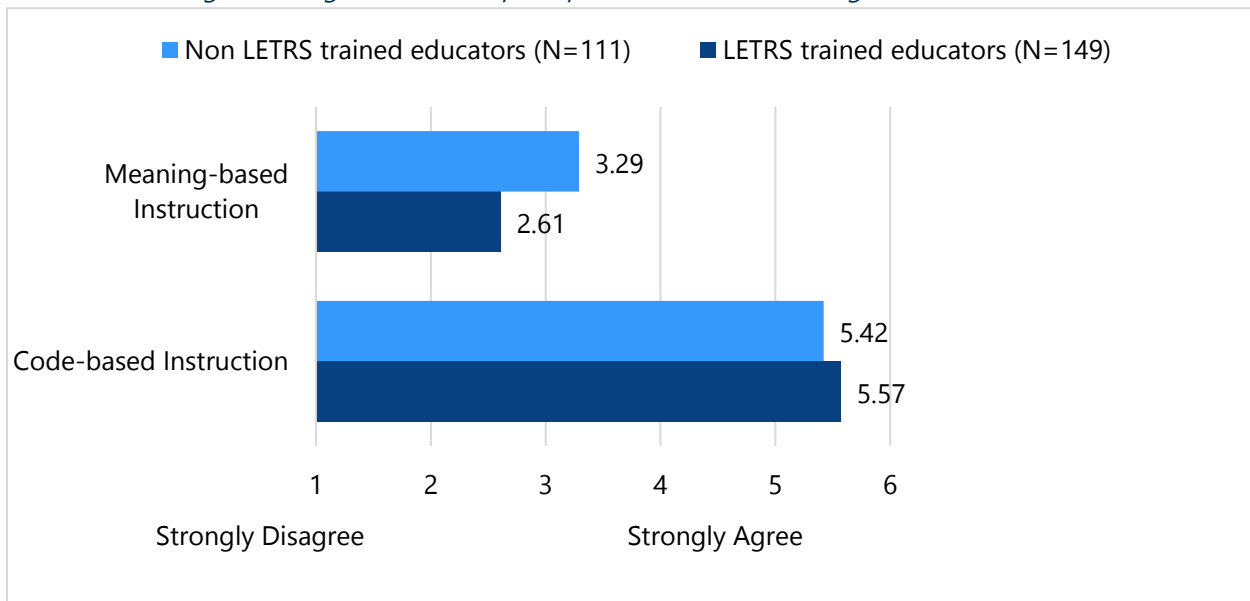
On average, educators indicate that they had learned only a slight amount (i.e., represented by a 2 on a 4-point scale) about the science of reading during their college experience, and that their college experience had only slightly prepared them to apply those concepts to their work supporting developing readers (see Figure 65).

Figure 65. College experience with Science of Reading (N's vary)



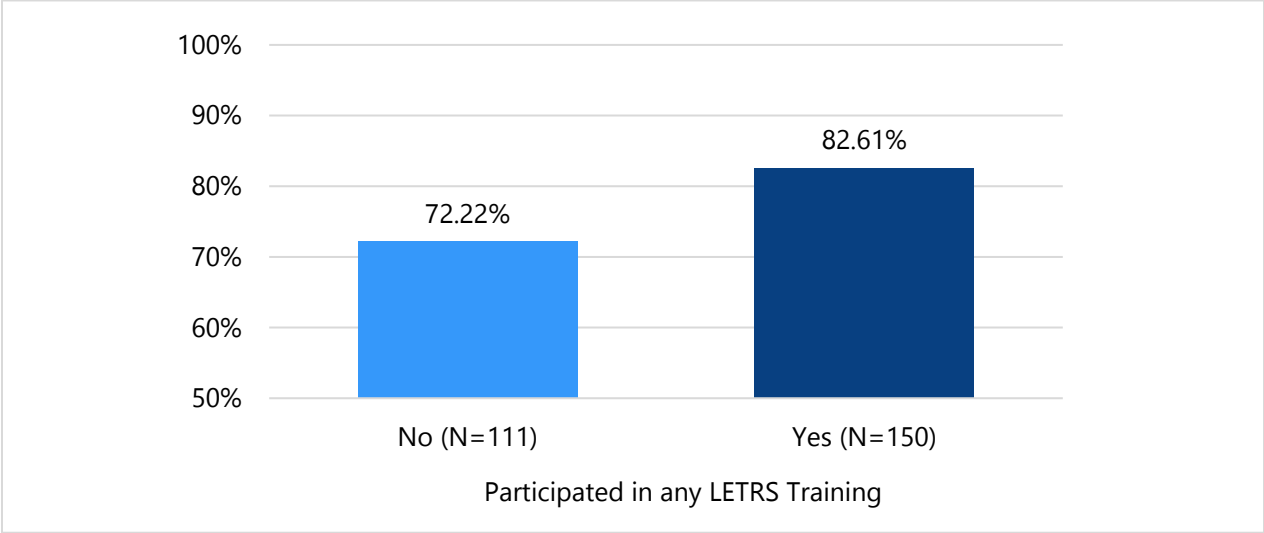
Findings from the Teacher Beliefs instrument suggest that surveyed educators' beliefs generally aligned more with code-based instructional practices than meaning-based instructional practices. While this was true for educators who were LETRS trained as well as those who were not, those who were LETRS trained indicated slightly less agreement with meaning-based instructional beliefs compared to those who were not (see Figure 66).

Figure 66. Agreement with principles of Code vs. Meaning-based Instruction



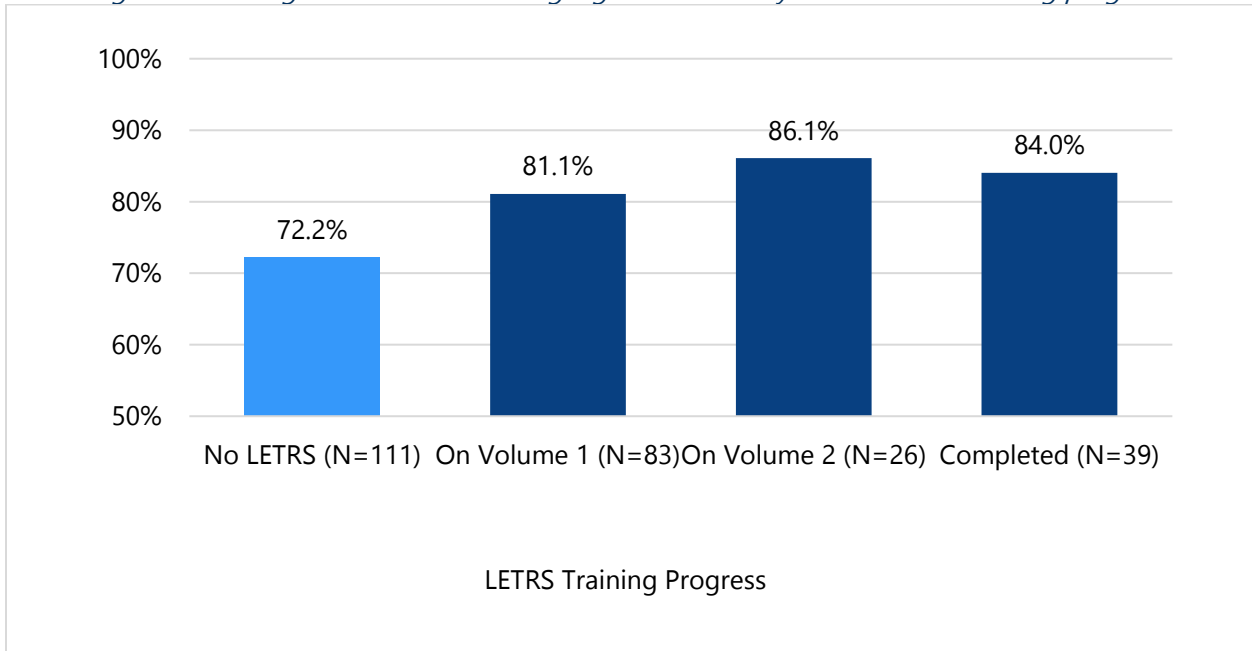
When it came to educators' knowledge, those who had participated in LETRS training were more likely to score higher on the Basic Language Constructs test compared to educators who had not yet participated in LETRS training (see Figure 67). Further statistical analysis revealed that this difference in knowledge between LETRS and non LETRS-trained teacher was significant ( $p < .001$ ), and that there was a small but meaningful effect size ( $\eta_p^2 = .21$ ). Teacher's beliefs about code or meaning-based instructional practices were looked at as a moderator between LETRS participation and knowledge, but were not found to be significant.

Figure 67. Average Scores on Basic Language Constructs Test



Although LETRS participation was a significant predictor of participants' knowledge of basic language constructs, post-hoc analyses revealed no further significant differences in knowledge based on how far educators had progressed through their LETRS training (see Figure 68). One potential explanation for this is that the items on the knowledge test were mostly related to topics that are introduced in LETRS Volume 1 rather than Volume 2.

Figure 68. Average Scores on Basic Language Constructs by level of LETRS training progress



Only eighty of the educators who participated in this supplemental study could be linked to students with available Fall 2022 and Spring 2023 DIBELS (i.e., the assessment used by PPS to measure student reading achievement) data. At the teacher-level, student achievement results were measured by calculating, for each teacher, the percentage of their students (based on available data) who were at or above benchmark (i.e., Core support or above) according to the DIBELS assessment.

A linear regression was conducted to assess the relation between educators' knowledge and the percent of their students who were at or above benchmark at the Spring 2023 timepoint, controlling for the percent of students at or above benchmark in the Fall of 2022. The results of this analysis were non-significant, as they did not reveal a correlation between educator knowledge and student achievement outcomes. Rather, variation in student achievement at the Spring timepoint was predicted only by student achievement at the Fall timepoint, according to our model. Similarly, an analysis of variance revealed no significant relation between educators' participation in LETRS training and the percent of students who were at or above benchmark at the Spring 2023 timepoint (again, controlling for the percentage of students at benchmark in the Fall of 2022). This non-significant association between LETRS training and student achievement outcomes aligns with the PPS student achievement findings discussed earlier in this report. As with previous recommendations, we suggest providing more time for LETRS teachers to fully complete the training and fully integrate new techniques prior to looking for changes in student achievement.

## Evaluation Insights & Recommendations

- ◆ Educators who received LETRS training shared enthusiasm for the opportunity it gave them to enhance their knowledge and skill in reading instruction and to become better equipped to meet their students' learning needs. According to multiple data sources (i.e., LETRS pre- and post-tests, supplemental study findings, educator surveys and interviews), the training indeed had a positive impact on teacher knowledge and skill. Furthermore, educators agreed that compared to other literacy-related professional development, they not only enjoyed the LETRS training more but found it more useful and relevant. As implementation progressed, buy-in to the LETRS program across districts seems to have increased as well, with some educators sharing that they joined after hearing positive reactions from their colleagues.
- ◆ Despite the overriding positive reception of LETRS, educators shared (in surveys, focus groups, and interviews) that the time commitment presents a substantial challenge to completing the program. Educators often used nights and weekends to complete their training, and district points of contact sited time requirements as a likely cause of attrition from the program. One district (Reynolds) provided dedicated time for educators to spend on LETRS, which educators from that district noted as a strong area of support. Reynolds also gave educators the option of completing LETRS in four years (rather than two) but found that many participants struggled more on the four-year track and were now interested in completing at a faster pace.
- ◆ The topic of monetary compensation for LETRS training was an important one for many interview and focus group participants, which also came through in survey findings. Some districts (PPS, Centennial, and Reynolds) provided compensation to LETRS participants. Points of contact noted that additionally, some educators expressed interest in receiving a pay increase for completing the program, which presents challenges when the program is not tied to college credit. Finally, some educators had paid for the LETRS training upfront and expressed some uncertainty regarding the process of being reimbursed by their district. Going forward, it may be beneficial for districts to engage in even more detailed communication with perspective LETRS participants regarding what to expect, particularly in relation to financial types of support.
- ◆ Administrators and educators shared ideas and lessons learned related to strengthening the support offered to LETRS participants. Administrators from several districts agreed that educators who were able to participate in the LETRS training with colleagues benefitted from going through the training with group support. Additionally, the three districts whose educators received coaching support (Centennial, DDS, and Reynolds) found that support to be valuable. Some administrators suggested that, in the future, PLCs, accountability groups, or partners may promote better experience, more program endurance, and greater application of the training into practice. Notably, all interviewed district administrators agreed that they would like to continue to provide LETRS training to their educators.
- ◆ According to survey results, educators perceived that their application of the LETRS training into their work had positively impacted the literacy outcomes of their students. In educational

intervention research, it is extremely rare to find evidence of student achievement outcomes associated with teacher professional development in less than 2 years. Nevertheless, findings on student achievement show some promising outcomes for students of LETRS teachers, compared to their peers. In particular, statistical analyses found that students of LETRS trained teachers in DDSD were 1.71 times more likely to have a Spring reading composite score at or above benchmark compared to students of non-LETRS trained teachers. Further, this finding held true for important subgroups, in that both ELL students and HU students at DDSD were more likely to have a reading composite score that was at or above benchmark compared to ELL and HU students of non-LETRS trained teachers. It is important to note that the impact of LETRS training was the most pronounced for students in the kindergarten grade-level, suggesting that the influence of LETRS informed teaching on student success may be highly meaningful for younger students.

# **Appendix A. Literature Review**



*A Review of the Literature on*  
**Language Essentials for Teachers of Reading  
and Spelling (LETRS)**



Prepared by:  
Pacific Research and Evaluation, LLC  
October 2022

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# INTRODUCTION

Language Essentials for Teachers of Reading and Spelling (LETRS) is a professional learning program for early childhood educators and administrators focused on early literacy and language foundations. Over a two-year period, participants engage in online units, face-to-face sessions, readings, and dedicated time to practice applying skills in the classroom, with learning measured by quizzes, tests, and document submission. Within Multnomah County, five districts have begun investing in LETRS training, including Portland Public Schools, Reynolds School District, David Douglas School District, Parkrose School District, and Centennial School District. In partnership with the Multnomah Education Service District (MESD), Portland Public Schools received funding from the Oregon Department of Education to support implementation of LETRS across these five districts, in addition to an independent study of LETRS implementation and outcomes. Ultimately, the study aims to provide information that supports state-level decisions about whether and how to invest in LETRS training statewide. Pacific Research and Evaluation was selected through a competitive bid process to complete the independent study, which includes in its scope the current literature review.

## *Purpose and structure of this review*

The purpose of this comprehensive review is to summarize and interpret the current body of literature related to the utilization, implementation, and impact of LETRS training. This literature review provides information and background for the formative and summative evaluation of LETRS across the five identified school districts in MESD and will support the contextualization of findings at the end of the study period. To increase relevance and applicability to the five districts included in this study, this review focuses to the extent possible on literature produced in the past decade and involving schools in urban locations. Where available, this review highlights the findings and conclusions drawn from peer-reviewed empirical studies. However, as discussed further in the conclusion of this review, there is a paucity of empirical literature examining LETRS; therefore, recent scientific literature is supplemented by older works as well as other sources, including reports, press releases, and other non-peer-reviewed articles.

This review begins with an overview on the science of reading, including theories and seminal work that form the foundational principals of LETRS, as well as a brief summary of the longstanding debate known as the 'reading wars.' Next, findings related to the impact of LETRS are presented. This review concludes by considering limitations and future directions for research and evaluation, as well as the types of additional supports for teachers that may complement LETRS training.

The LETRS program is one, but not the only, professional training that uses the science of reading as its foundation; however, it was beyond the scope of this review to explore the

literature around additional professional development programs. For more information on available options, refer to the National Council on Teacher Quality's action guide for states (2020).

## SCIENCE OF READING OVERVIEW

Scientific inquiry into early reading development spans many decades and constitutes a vast and multi-faceted body of research, an important segment of which is summarized in the oft-cited National Reading Panel Report from the National Institute of Child Health and Human Development (NICHD, 2000). The NICHD report, which was used to inform the No Child Left Behind Act of 2001 and the Reading First initiative, identified five components of effective reading instruction that the authors found to be repeatedly supported by research findings.

### *Five components of effective reading*

Since the publication of the NICHD report (2000) and the No Child Left Behind Act (2001), these five components have been increasingly referenced in articles and material related to professional development (PD) for teachers of reading (for example, see: Jiban, 2022; National Council on Teacher Quality, 2020; Learning Point, 2004). The components are listed below, along with examples of how they appear in classroom instruction (Jiban, 2022):

- ◆ **Phonemic awareness** – developing students' understanding of the sounds made by spoken words
- ◆ **Phonics** – systematically mapping sounds of spoken words onto letters and letter combinations
- ◆ **Fluency** – providing extended reading practice to increase students' reading efficiency and lower the effort involved in word identification so that more mental energy can be devoted to understanding the meaning of the text
- ◆ **Vocabulary** – including ongoing, long-term vocabulary instruction, and teaching vocabulary words prior to assigning reading in order to build students' lexicons
- ◆ **Comprehension** – giving instruction that helps students develop their ability to construct reasonable and accurate meaning from text using background knowledge and context

These five components have become the central hallmarks of what has been termed the science of reading. More research released since the NICHD report has continued to point to the importance of these five factors in students' reading achievement (e.g., see McCutchen et al., 2009). Taken together, there is a strong body of evidence for their significance.

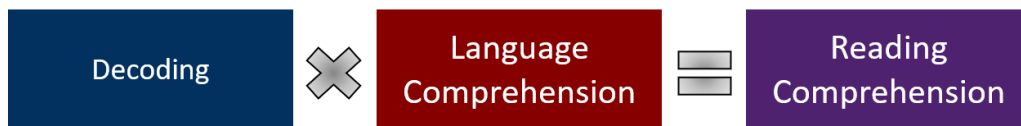
Much of the research supporting these components rests on several theoretical models that emphasize the importance of phonics in the development of literacy skills. Three of the most

influential models—the simple view of reading (Gough & Tunmer, 1986), Scarborough’s (2001) rope model of reading, and the four-part processing model (Seidenberg & McClelland, 1989)—are outlined below and covered extensively in the first module of the LETRS training (Moats, 2009).

### *The simple view of reading*

The simple view of reading model describes reading comprehension as the product of decoding (or the ability to use phonics awareness to sound out words) and language comprehension (Gough & Tunmer, 1986). Moats cites the simple view of reading in LETRS training material, noting the multiplicative properties between decoding and comprehension which make both domains necessary and positively related to reading comprehension.

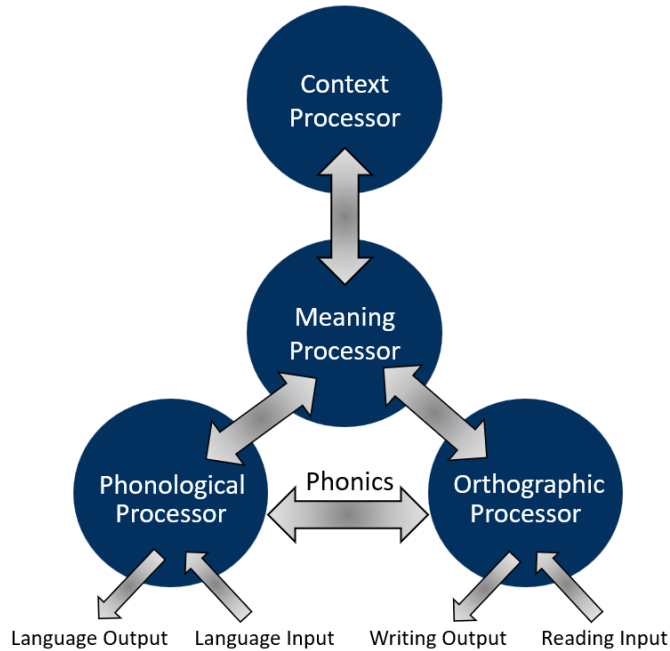
*Figure 1. Two domains of reading comprehension in the simple view of reading*



### *The four-part processing model*

Another model that often arises in discourse on the science of reading is Seidenberg and McClelland’s (1989) four-part processing model (Figure 2), which describes the brain-processing systems involved in word recognition. The LETRS program extensively emphasizes the components of this model and explicitly focuses a number of its training modules on these processing systems as they relate to teaching and reading development. Moats explains that most reading disorders, including dyslexia, originate with a language processing weakness; therefore, providing teachers with the skills to identify and help students with processing challenges may be an important early intervention strategy (Moats, 2019).

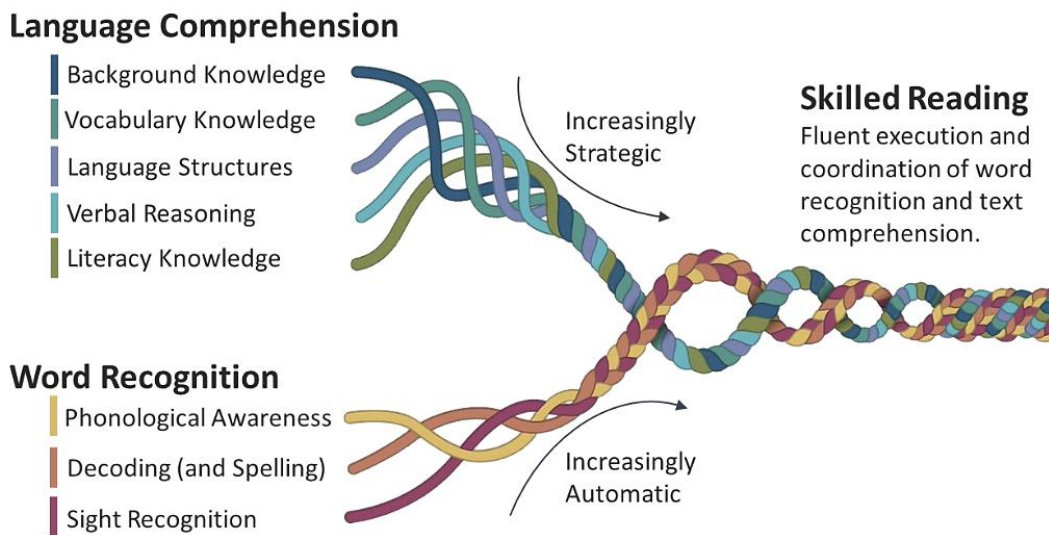
Figure 2. The four-part processing model for word recognition



### Scarborough's reading rope

A third notable model popular among science of reading advocates, including Moats, is Scarborough's (2001) reading rope (Figure 3). Expanding on the simple view of reading, Scarborough proposed subsets of skills that contribute to each of the two domains of reading. Each skill can be thought of as a strand that together compose a 'reading rope,' with more and stronger skills contributing to stronger overall reading.

Figure 3. Scarborough's Reading Rope



### *Debate and commentary on the science of reading*

The term 'science of reading' has long been closely associated with phonics and decoding, as far back as the 1830s (Shanahan, 2020). The debate over the science of reading is, at its core, a debate over how much or if phonics and decoding should be explicitly taught to emerging and early readers (Castles et al., 2018). Proponents of the argument opposite of science of reading support approaches that, to varying degrees, deemphasize phonics. For example, the whole language approach stresses the importance of repeated exposure to words and literacy-rich environments when it comes to reading development, and the value of reading comprehension at the text-level above and beyond the word-level (Goodman, 1967; Smith & Goodman, 1971). Whole language theorists suggest that reading is the result of a three-part cueing system in which readers take cues from context (e.g., surrounding words or sentence structure) as well as letter-sound knowledge to help them identify words, at times using some degree of guesswork (Watson, 1989; Smith, 2012).

While whole language and cueing-based reading approaches generally support some level of phonics instruction, they tend to be less systematically incorporated into lessons—a key crux of the debate over the science of reading (Semingson & Kerns, 2021). However, as LETRS founder Louisa Moats (2020) and other science of reading advocates assert, there is a preponderance of evidence to suggest that students who receive systematic phonics instruction learn to read faster, more fluently, and with higher comprehension compared to students who do not (Dehaene, 2011; Ehri et al., 2001; NICHD, 2000). For them, it is 'settled science,' and the debate is over.

### *Translating the science of reading into policy and practice*

Unfortunately, some highly publicized attempts to translate this body of research into policies and practice have not been as well executed or as effective as hoped. For example, the No Child Left Behind Act of 2001 has been widely criticized for the constraints it put on teachers' ability to make use of their individual expertise and creativity, pushing them instead to 'teach to the tests' and to use scripted, drill-oriented instructional methods, which many teachers perceived to have a negative impact on students' motivation to read and write (Powell et al., 2009).

Perhaps most discouraging is that, despite the collective interest in improving literacy among school-aged children, and the investment of a great deal of resources and time, reading proficiency has remained stagnant and even declined in many states (US Department of Education, 2019). According to 2019 reading assessment data from the US Department of Education, only 35% of fourth graders and 34% of eighth graders were proficient readers. In 17 states, reading proficiency for fourth graders significantly decreased between 2017 and 2019. Only one state, Mississippi, saw significant reading improvement among fourth graders in that

same period (US Department of Education, 2019). Notably, teachers in Mississippi have been receiving universal LETRS training since 2014, thanks to a science of reading bill passed by state legislatures the previous year (Mississippi Department of Education, 2021). Additional information and data from this statewide implementation are included in the Impact of LETRS section that begins on the next page of this review.

Promoters of reading reform today call for more teacher autonomy, combined with PD that supports teachers in gaining the science-based knowledge that they need to more effectively teach reading (Moats, 2020). While traditional teacher education programs (i.e., undergraduate and graduate programs for teachers) have begun adopting more coursework that aligns with the science of reading, it remains far from a universal practice among institutions (National Council on Teacher Quality, 2020), and does little to address gaps in veteran teacher knowledge. For years, experts have been warning that the majority of teacher preparation programs do not thoroughly prepare teachers to help students develop all of the essential skills for reading (Brady et al., 2009; Joshi et al., 2009a; Joshi et al., 2009b; Walsh et al., 2006). These apparent gaps in teacher education are a main focus of what LETRS (and other similar PD programs) aims to address (Hejtmanek, 2021).

## THE IMPACT OF LETRS

As previously mentioned, the LETRS program is a PD program for teachers. LETRS is not a curriculum, but it is designed to provide teachers with the knowledge and skills to more successfully use curricula that are based on the science of reading in their classrooms. Teachers with more foundational reading and writing knowledge (e.g., regarding phoneme awareness, phonics, etc.) are more likely to instruct students on those essential foundational skills (Cunningham et al., 2004), which supports all developing readers, especially those who are struggling (McCutchen et al., 2009). Therefore, the intended impact of LETRS can be thought of in two general ways: the direct impact on teachers (e.g., their knowledge, confidence, or the ways in which they teach); and the indirect impact on students (most notably, their reading and writing achievement).

### *Scientific evidence on the impact of LETRS*

This section presents research finding from two rigorous evaluations on the impact of the LETRS program. These studies stand out in the body of literature based on their specific focus on the LETRS training and its impact, as well as their use of research designs and methods that are scientifically founded. This review of the literature identified no other studies that met the same criterion.

**Overview of study & methods:** In 2014 the Mississippi Department of Education began providing LETRS training to K-3 teachers using online modules and face-to-face workshops, and provided literacy coaches in target schools with the lowest reading achievement scores based on statewide assessments. This study examined changes in Mississippi teachers' knowledge and competency, quality of instruction, and student engagement with literacy instruction between winter 2014 and fall 2015. To measure these outcomes, the authors developed and validated an evaluation tool called the Teacher Knowledge of Early Literacy Skills (TKELS) survey, as well as a classroom observation tool called the Coach's Classroom Observation Tool (CCOT). The TKELS was administered by the Mississippi Department of Education to kindergarten through third grade teachers statewide at four timepoints between winter 2014 and fall 2015; it was completed by 7,638 individual teachers, 40% of whom completed the survey at multiple timepoints. The CCOT was administered at four timepoints between winter 2014 and spring 2015 by literacy coaches in target schools only; it was used to observe the classrooms of 316 teachers, 80% of whom were observed at multiple timepoints.

**Outcomes - teacher knowledge:** Findings revealed that teacher knowledge of early literacy skills increased between the first to the fourth timepoint, rising from an overall score in the 48<sup>th</sup> percentile to the 59<sup>th</sup> percentile (based on a standardized distribution with an average of 50). Moreover, teachers who had completed the LETRS program were found to have significantly more knowledge of early literacy skills at the end of the study (ending in the 65<sup>th</sup> percentile) compared to teachers who had not yet started the LETRS program (this group scored in the 54<sup>th</sup> percentile at the final timepoint).

**Outcomes – teacher competency & quality of instruction:** Within target schools, average ratings of teacher competency increased between the first and the final timepoint, moving from the 30<sup>th</sup> percentile to the 44<sup>th</sup> percentile. Also within target schools, the average ratings of quality of early literacy instruction increased, rising from the 31<sup>st</sup> percentile to the 58<sup>th</sup> percentile. At the final study timepoint, teachers who had completed LETRS training were rated as significantly higher on competency and quality of instruction compared to teachers who had not yet started the training.

**Outcomes – student engagement:** Within target schools, average ratings of student engagement increased between the first and the final timepoint, from averaging in the 37<sup>th</sup> percentile to the 53<sup>rd</sup> percentile. At the final timepoint, student engagement was rated as significantly higher in the classrooms of teachers who had completed LETRS training, compared to those who had not yet started it.

**Limitations:** The authors acknowledge that the study design does not allow for causal inferences to be made. In other words, it is not known with certainty that the LETRS training or literacy coaching (versus other variables that were not controlled for) were the reasons that measured outcomes improved over the course of the study. The study also was not designed to take into account LETRS' impact on student reading or writing achievement outcomes.

**Additional notes:** Other sources have noted that Mississippi students' reading achievement increased more than any other state in the years since Mississippi teachers began widely receiving LETRS training (Hanford, 2019); however, these observations still do not offer causal evidence (Helms, 2021). It is also worth noting that in 2013 Mississippi was scoring much lower than other states for student reading proficiency, and the state's increase (which started trending upward even before 2013) has just begun to put them on par with national averages (Helms, 2021).

*Garet et al., 2008*

**Overview of study & methods:** This study assessed the impact of LETRS training and literacy coaching on second grade teachers' knowledge and instructional practices (based on the five components of reading from the NICHD report; 2000), and on their students' reading achievement. The sample consisted of 90 schools from six urban school districts in low-income areas. Schools were randomly assigned to one of three treatment groups (treatment A, treatment B, and a control group). Schools in treatment A implemented LETRS training with second grade teachers in the 2005-2006 school year; treatment B schools implemented LETRS training plus literacy coaching for second grade teachers the same year; and the control group continued 'business as usual' by providing their district's standard PD to second grade teachers.

Teacher knowledge was measured after the PD implementation phase using the Reading Content and Practices Survey (RCPS), which the authors developed for this study. A classroom observation tool measured reading instructional practices. Reading scores from district assessment records from 2004 to 2007 were used to assess student reading outcomes. Across schools, a total of 270 second grade teachers participated in this study during the implementation year; during the follow-up year, 250 and 254 teachers participated in data collection during the fall and spring, respectively.

**Outcomes - teacher knowledge:** Teachers in both treatment groups A and B scored significantly higher on reading knowledge measured at the end of the implementation year (spring 2006) compared to teachers in the control group.

**Outcomes - teacher instructional practice:** Classroom observations revealed that teachers in both treatment groups A and B used significantly more explicit reading instruction related to phonemic awareness, phonics, fluency, vocabulary and comprehension. No significant differences were found between groups when it came to two other types of instructional practices (i.e., independent student activity instruction, and differentiated instruction).

**Outcomes – student reading achievement:** Based on student reading assessment data, the authors of this study found no significant difference between any of the treatment groups when it came to student reading achievement. This null finding held both when looking at student achievement during the implementation year, as well as the year following. Although there were no significant differences in student achievement between the treatment groups, the study did reveal a significant positive association overall between teacher knowledge and student achievement scores.

**Limitations:** The authors suggest that student mobility could have limited the ability of this study to uncover significant results related to student achievement. At the end of the implementation year, 17% of enrolled students were ones that had not been enrolled at the beginning of the school year, meaning that they did not receive a full year of instruction from the same teacher or within the same school.

**Additional notes:** The impact of the LETRS and coaching treatment on teacher knowledge is encouraging, particularly when considered alongside the finding that teacher knowledge was positively associated with student achievement. It is possible that the effect of LETRS and coaching on teacher knowledge was not large enough to result in significant student achievement outcomes. This interpretation of Garet et al.'s findings, if accurate, would suggest that LETRS and coaching-based PD might be especially beneficial for teachers who are less knowledgeable about one or more of the five key reading components.

### ***Supplemental evidence***

Several other reports and articles related to the impact of LETRS were identified during this review process but were determined to be less relevant to the current study than those outlined above. Articles from this supplemental body of evidence are briefly presented below.

#### ***Preskitt & Ernest, 2020***

In 2018, Alabama began providing LETRS training to pre-K through third grade teachers. This non-peer reviewed evaluation report focused on the impacts of LETRS training in Alabama's pre-K classrooms. Findings indicated that LETRS-trained pre-K teachers had more positive teacher-child interactions and classroom quality (according to the CLASS,

or Classroom Assessment Scoring System) compared to a national comparison group. The study also found that children in LETRS classrooms showed more progress toward kindergarten readiness from the beginning of the school year to the end compared to the progress made by children in non-LETRS classrooms.

#### *North Carolina Department of Public Instruction, 2022*

This recent press release compared student reading proficiency data from kindergarten, first grade, and second grade students in North Carolina (NC) to data from 1.6 million students in other states (measured on the same reading assessment). Results revealed that NC students in each target grade level began the 2021–2022 school year with lower reading proficiency compared to students in other states but ended the school year at or above the national average (these were observed differences, not tested for statistical significance). Kindergarten students in NC in particular made impressive reading gains. At the beginning of the school year only 27% of NC kindergarteners scored at or above the national reading proficiency benchmark (compared to 36% of kindergarteners in other states), but by the end of the school year 67% of NC kindergarteners were at or above the benchmark (compared to 60% of kindergarteners in other states). These notable improvements come just a year after NC passed related legislation and began providing LETRS training to elementary and pre-K teachers statewide (see Fofaria, 2022). While promising, these results are observational and descriptive only and, as such, do not provide causal evidence of LETRS' impact.

#### *Carlisle et al., 2009*

This peer-reviewed study examined the relation between first through third grade teachers' knowledge about early reading with their students' improvement on word analysis and reading comprehension. Prior to the study, participating teachers received two types of PD, one of which was LETRS. This study did not differentiate the impact of one type of PD over the other on teacher knowledge. Teacher knowledge was assessed using the Language Reading Concepts test. Findings from this study regarding the association between teacher knowledge and student reading improvement were not significant. The authors suggest that a lack of alignment between the content of the LRC, the reading curriculums being used, and the assessment used to measure students' learning could have undermined their ability to find significance.

#### *Carlisle & Berebitsky, 2009*

This peer-reviewed study investigated the impact of literacy coaches on teacher and student outcomes. Teachers in this study were first grade teachers, all of whom received LETRS training the previous year. The study compared outcomes for 43 teachers who

received literacy coach support to 33 teachers who did not. Looking at changes from beginning of the school year to the end, findings revealed greater improvement on word decoding for students of teachers with literacy coaches compared to those without. Results suggest benefits of a model of PD in reading that includes school-based coaching for teachers of first grade.

## CONCLUSION

Overall, evidence for the impact of the LETRS training for teachers on their students' reading development is limited, but promising. Some results indicate that LETRS training increases teacher knowledge of core reading development processes and strategies (Folsom et al., 2017). Other studies have positively linked teacher knowledge in this domain with student reading achievement (Garet et al., 2008), although researchers investigating this association have not always established its significance (Carlisle et al., 2009).

Mississippi and North Carolina stand out as states that have implemented LETRS training widely and, soon after, recorded better than average improvements in students' reading proficiency scores (US Department of Education, 2019; Mississippi Department of Education, 2021; North Carolina Department of Public Instruction, 2022). However, the role of LETRS in those states' student achievement results has yet to be empirically established. It is also worth noting that prior to implementing LETRS, Mississippi and North Carolina were performing far below national averages for elementary students' reading proficiency (Helms, 2021; Fofaria, 2021). Therefore, it is not clear that the same results could be expected in states where student reading proficiency is already closer to the national average, or in classrooms of teachers who are already knowledgeable about the science of reading.

As LETRS training for teachers and administrators becomes more widely implemented, studies examining its impact in classrooms and communities with a variety of characteristics will be important additions to this body of research. Also, it may be helpful for researchers to explore whether the effects of LETRS on teachers' knowledge and performance varies based on teachers' previous exposure to science of reading (i.e., especially as colleges and universities continue to add more of a focus in this area for teacher preparation). Along the same lines, research on the effectiveness of different elementary reading curriculums, the use of school-based literacy coaches, and other potential resources and supports may reveal useful strategies for promoting the success of LETRS.

### *Strategies for supporting teacher success*

As LETRS implementation moves forward in Multnomah County, districts may want to consider additional strategies to support teacher success with the program. Fortunately, certain aspects

of the LETRS program already align with expert suggestions for making PD successful, such as incorporating opportunities for reflection and active learning (Darling-Hammond et al., 2017). Another recommended component of LETRS includes coaching to support teachers; this strategy is echoed by experts in the field of effective PD practices (Darling-Hammond et al., 2017) and has been incorporated into the proposed implementation plan to support teachers in Multnomah County. Perhaps most importantly, teachers need adequate time to complete the program, connect their learning to their classroom lessons, and to discuss what they are learning with other teachers. A research brief from the National Comprehensive Center for Teacher Quality (Archibald et al., 2011) provides some guidance around how schools can make more time for teacher PD, including setting aside hours each week by adjusting the amount of time used for other tasks (e.g., teacher planning or staff meetings). Finally, school leadership can play an important role by demonstrating that they support, prioritize, and are committed to PD for teachers (Bredeson, 2000).

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# Oregon's Early Literacy Framework

A Strong Foundation for  
Readers and Writers (K-5)



OREGON  
DEPARTMENT OF  
EDUCATION

*Oregon achieves . . . together!*

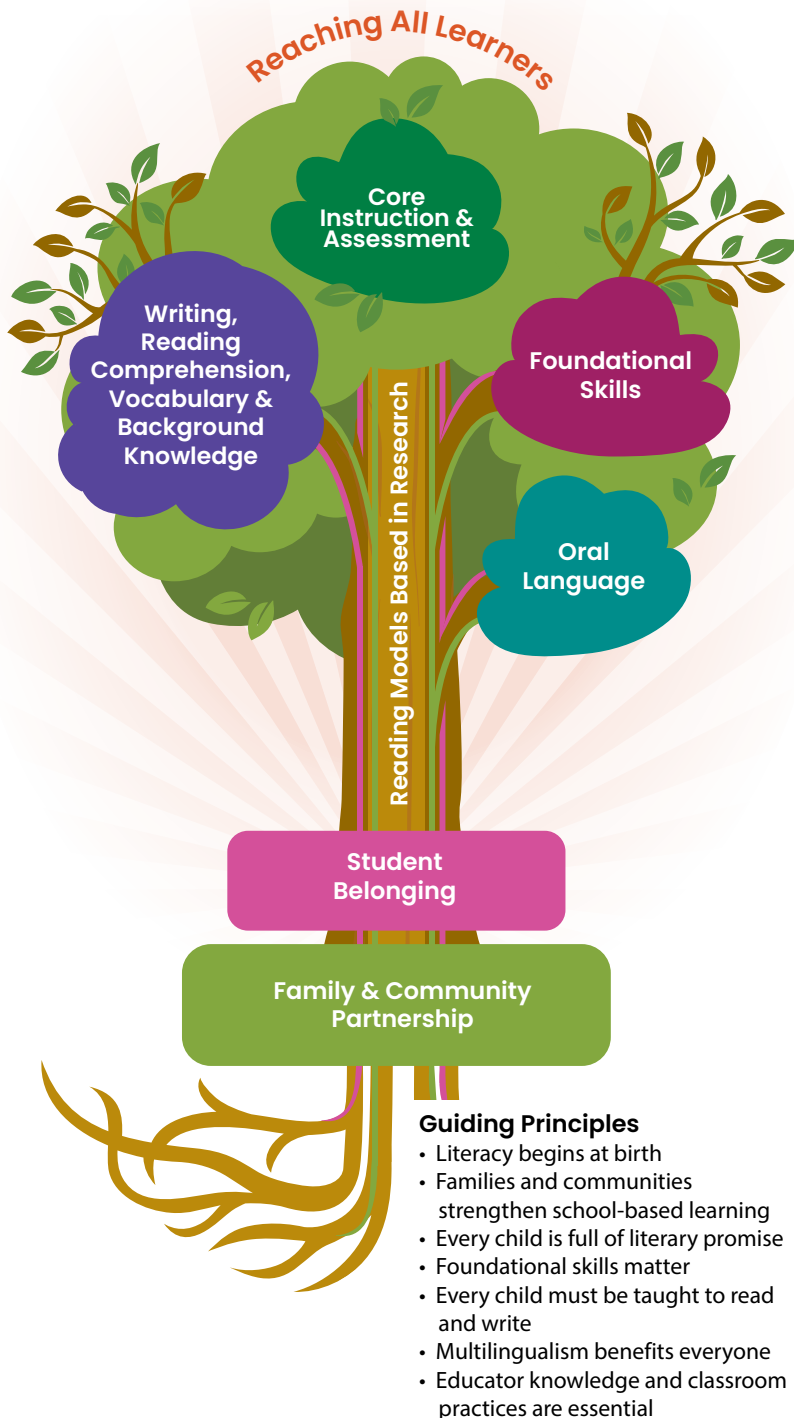


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# Framework Overview



Oregon's Early Literacy Framework includes eight sections that work in reciprocity with one another to help reinforce culturally responsive practice and reading science as fundamental to children's literacy and multilingual development.

- ▶ **Section 1: Student Belonging – A Necessary Condition for Literacy Learning**
- ▶ **Section 2: Family & Community Partnerships**
- ▶ **Section 3: Oral Language as the Root of Literacy Development**
- ▶ **Section 4: Reading Models Based in Research**
- ▶ **Section 5: Foundational Skills**
- ▶ **Section 6: Writing, Reading Comprehension, Vocabulary, & Background Knowledge**
- ▶ **Section 7: Core Instruction & Assessment**
- ▶ **Section 8: Reaching All Learners**

Figure 1 reflects the reciprocal and interconnected relationship between the sections and reinforces the importance of the ways in which all sections of the framework co-exist in relationship with one another.

This framework builds momentum and capacity for strengthening belonging and literacy instruction in every elementary classroom so that all children leave elementary school proficient in reading and writing in at least one language. It speaks to the comprehensive nature of literacy instruction and underscores the complexity of learning to read and write.

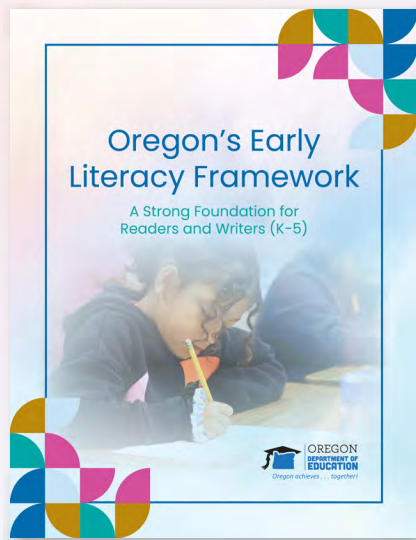
**Figure 1. Oregon's Early Literacy Framework Graphic**

This framework aims to be a foundational literacy resource (or mentor text), for K–5 classroom teachers, specialists, elementary school principals/K–8 principals, superintendents, district leaders, and education service district leaders. More broadly, it is relevant for all who are committed to seeing literacy learning maximized for every student through high-quality instruction.

# Navigating the Framework & Playbook

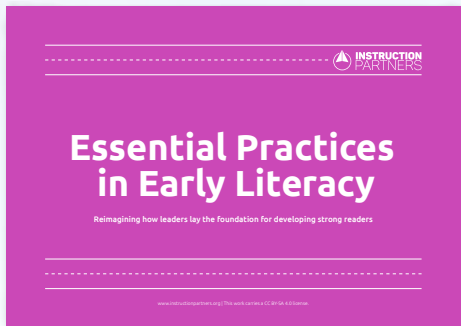
Early Literacy Framework + Early Literacy Playbook = Leading for Literacy Learning Improvement

Put simply, the framework provides the “why” and the “what” for literacy improvement, while the playbook provides the “how.”



## The Why & What

**Oregon's Early Literacy Framework** builds momentum and capacity for strengthening belonging and literacy instruction in every elementary classroom so that all children leave elementary school proficient in reading and writing in one or more languages, with as many opportunities to build on their funds of knowledge in additional languages as possible. It speaks to the comprehensive nature of literacy instruction and at its core, is designed to be used as a primary resource (or mentor text) for district leaders and school leaders. The framework is designed around eight sections that work in reciprocity with one another to help reinforce culturally responsive practice and reading science as fundamental to children's literacy and biliteracy development.



## The How

**Instruction Partners' Early Literacy Implementation Playbook<sup>1</sup>** provides ready-to-use, step-by-step guidance. Early literacy leaders and educators can use this playbook to strengthen and monitor literacy development in their school or system, whether building the essential implementation practices from scratch or tuning up what they already have in place.

Overall, the playbook aligns closely with the content of Oregon's Early Literacy Framework, with a few exceptions. As is true when using any resource, there will be opportunities for calibration and potential adaptations. For example, while the playbook indicates K-2, it can (and should) be easily adapted for K-5.

The playbook is organized around five essential implementation practices<sup>2</sup> (Vision, Materials, Data, Team, Time) in early literacy and includes workbooks for four phases of work designed to follow a three-five year arc of deep literacy strategy and implementation.

1 [Instruction Partners, 2021a](#)  
2 [Instruction Partners, 2021b](#)

# Key Terminology

While an extensive [glossary](#) lives at the end of this framework, these key terms are highlighted at the beginning of the framework to provide clarity and reinforce shared meaning-making.

## CORE INSTRUCTION

**Core instruction:** high-quality instruction in the general education setting that is aligned to grade-level standards, centered around grade-level-aligned materials, and inclusive of every student in the classroom, regardless of performance level.<sup>3</sup> Sometimes also referred to as Tier I Instruction, this is the primary prevention for reading and writing difficulty. It maximizes learning by providing access to peer learning models, the classroom teacher, and grade-level aligned texts and tasks.

## CULTURALLY RESPONSIVE

**Culturally responsive:** the implicit recognition and incorporation of the cultural knowledge, experience, and ways of being and knowing of students in teaching, learning, and assessment. This includes identifying, valuing, and maintaining a high commitment to students' cultural assets in instruction and assessment; diverse frames of reference that correspond to multifaceted cultural perspectives/experiences; and behaviors in the classroom that can differ from White-centered cultural views of what qualifies as achievement or success.<sup>4</sup>

*Note: The term “culturally responsive practices” centers the importance of affirming students’ intersectional cultural identities. However, there are other terms and bodies of research that are important to uplift: culturally sustaining pedagogies, linguistically responsive instruction, and culturally relevant pedagogy. While each of these terms and bodies of research vary in their definitions (see the glossary for a full definition of each), they all reinforce the importance of creating and cultivating a learning environment where students feel seen, heard, and valued – where students know they belong and can show up and learn as their full and authentic selves.*

## EARLY LITERACY

**Early literacy:** skills outlined by Oregon’s English Language Arts and Literacy Standards for grades K–5, inclusive of reading foundational skills (e.g., print concepts; phonological awareness; phonics, decoding, and word recognition; fluency); comprehension; language and vocabulary; writing; speaking and listening. These standards reflect the literacy skills and knowledge that begin developing before students enter kindergarten and lay a foundation for more advanced literacy development in later grades.

## EVIDENCE-BASED LITERACY PRACTICES

**Evidence-based literacy practices:** instructional practices with a proven record of success based on reliable, trustworthy, and valid evidence that when implemented with fidelity result in adequate gains in literacy achievement for students.<sup>5 6</sup>

## FOCAL STUDENT GROUPS

**Focal student groups:** students of color; students experiencing disabilities; emerging bilingual students; students navigating poverty, homelessness, and foster care; and other students who have historically experienced disparities in our schools.<sup>7</sup>

3 [Bowen, 2021](#)

4 [ODE, n.d.-a](#)

5 [Dyslexia-Related Training: Definitions, 2018](#)

6 ODE defines evidence-based in a range of ways given the complex bodies of work across the K-12 system.

7 [Oregon Department of Education \(ODE\), 2022c](#)

## MULTILINGUAL LEARNER

**Multilingual learner:** a student who, by reason of foreign birth or ancestry, speaks or understands languages other than English, speaks or understands little or no English, and/or requires support in order to become proficient in English.<sup>8</sup> “Multilingual learner” is used intentionally to promote multiliteracy and honor the process of language and literacy development in two or more languages. While English Learner is the formal term used most often in K–12 policy, this term is inadequate and reinforces a deficit view of multilingual students. To reinforce the cognitive benefits of multilingualism and the importance of neutralizing language status, additional terms (such as multilingual learners and emergent bilinguals<sup>9</sup>) bring an asset orientation necessary to ensure children are valued for the language(s) developed in their home and community context.

*Note: Oregon’s Early Literacy Framework is primarily written from the lens of developing literacy for multilingual learners within an English instructional model. Wherever possible, best practices for multilingual learners participating in dual language education with biliteracy as the intended outcome is incorporated throughout the framework. With the understanding that best practice for supporting multilingual learners’ literacy development is to build upon their linguistic repertoire through multilingual instructional programs such as dual language education, the current reality is that the majority of multilingual learners in Oregon are developing literacy within English instructional programs.*

## RESEARCH-BASED LITERACY PRACTICES

**Research-based literacy practices:** models, theories, and practices that are based on the best research available in the particular field of study. These practices differ from evidence-based in that they have not been researched in a controlled setting to measure efficacy.

## SCIENCE OF READING

**Science of reading:** research that is aligned with “neurological and cognitive science studies of how brains process written words<sup>10</sup>,” and includes a broad collection of research from multiple fields of study including cognitive science, learning sciences, literacy research, and instructional science and research broadly.<sup>11</sup>

*Note: Within Oregon’s Early Literacy Framework, this definition of the science of reading reinforces the essential role it plays in informing literacy instruction. Reading research provides fundamental information about reading and it deserves to be recognized as such. Furthermore, it underscores the complexity and richness of literacy instruction. Amanda P. Goodwin, co-editor of the academic journal Reading Research Quarterly, describes the science of reading as: “not just phonemic awareness, phonics, reading fluency, vocabulary, and comprehension but also language development, motivation, dyslexia, the reading of digital texts, multilingual literacy, the literacies of Black students and other historically minoritized student groups...”<sup>12</sup>*

*Ultimately, the term “science of reading” can be interpreted in divisive ways or in informative ways; the goal in this framework is to use the science of reading as a term to bring clarity and common ground to move Oregon forward in supporting the literacy development of all students.*

See [Appendix C: Glossary](#) for additional terms.

8 [NYSED, 2019](#)

9 [García, 2009b](#)

10 [Shanahan, 2021](#)

11 [National Center on Improving Literacy, 2022](#)

12 [Heller, 2022](#)

# Introduction & Purpose

When a child first comes to school, they arrive brimming with literary and linguistic strengths that are ready to be seen and expanded. Children begin literacy learning in their homes and communities, where language, culture, and identity are affirmed by families and caregivers who serve as important first teachers and storytellers. Students' accumulated familial, cultural, and linguistic experiences, or funds of knowledge,<sup>13</sup> serve as the foundation for building rich literacy skills and experiences and finding deeper joy, meaning, and purpose in the larger world.

"Literacy is inseparable from opportunity, and opportunity is inseparable from freedom. The freedom promised by literacy is both freedom *from*—from ignorance, oppression, poverty—and freedom *to*—to do new things, to make choices, to learn."

Koichiro Matsuura

Children need literacy instruction that guarantees proficiency, addresses individual strengths and needs, and provides learning conditions and content exposure that honors linguistic and cultural assets and lived experiences. The significance of literacy cannot be overstated; it has been described as a social determinant of health, with literacy deficits leading to lifetime impacts.<sup>14</sup> Oregon's Early Literacy Framework emphasizes core instructional practices that benefit all students, with an intentional emphasis on how those practices can be leveraged to best serve students in focal groups who have historically been marginalized by education systems.

This framework delivers an approach to comprehensive literacy instruction that, if used well, will meet the strengths and needs of all students. Far too often and with far too much predictability, students in underserved focal groups in Oregon may be farthest away from literacy success due to systemic inequities, implicit bias, racism, lack of access to high quality instructional and reading materials that reflect the diversity of our students and lack of instructional opportunity.

<sup>13</sup> Moll et al., 1992 (see [Appendix C: Glossary](#))

<sup>14</sup> Hutton et al., 2021

To nourish our children in ways that lead to literary empowerment requires collective commitment. From the local library to Relief Nurseries, community partners to child care providers, preschools to higher education, local businesses to teacher preparation programs, and elders to neighbors: literacy is a community commitment. Moreover, the Oregon Department of Education, education service districts, school districts, and public charter schools hold an essential responsibility to ensure every child in Oregon reads and writes with confidence and competence in at least one language.

To realize this promise, significant strides are needed to improve the quality of literacy instruction and to ensure the experience of belonging in classrooms. This means ensuring that every student receives classroom instruction aligned to grade-level standards and scaffolded for their success (see [Appendix B: Companion Guidance Documents & Resources](#)) and informed by research and culturally responsive practices, and cultivating and strengthening community partnerships and family engagement to meet students' strengths and individual needs.

#### THE CORE PURPOSE OF THIS FRAMEWORK IS TO:

- Build statewide coherence, clarity, and common ground.
- Fuel action and improvement.
- Support districts and schools in the implementation of a comprehensive literacy vision and plan.
- Serve as a shared north star for educators, leaders, and community, in alignment with the Governor's vision for improving student literacy outcomes.

In support of strong readers, writers, and thinkers, Oregon's Early Literacy Framework provides a statewide call to action, and lays out a research-based instructional vision including the essential building blocks for K-5 educators to grow every student's literacy skills. At its heart, Oregon's Early Literacy Framework is intended to build momentum and capacity for strengthening belonging and literacy instruction in every elementary classroom so that all children leave elementary school proficient in reading and writing in one or more languages, with as many opportunities to build on their funds of knowledge in additional languages as possible.

The following Institute of Education Sciences, "What Works Clearinghouse" Practice Guides informed the development of Oregon's Early Literacy framework.

- [Foundational Skills to Support Reading for Understanding in Kindergarten Through 3rd Grade](#)
- [Improving Reading Comprehension in Kindergarten Through 3rd Grade](#)
- [Preparing Young Children for School](#)
- [Teaching Academic Content and Literacy to English Learners](#)
- [Assisting Students Struggling With Reading: Response to Intervention \(RtI\) and Multi-Tier Intervention in the Primary Grades](#)
- [A First Grade Teacher's Guide to Supporting Family Involvement in Foundational Reading Skills](#)
- [Teaching Elementary School Students to Be Effective Writers](#)

# Guiding Principles

Persistent opportunity gaps in nearly all aspects of our educational system invite a collective interrogation of the beliefs and mindsets that underlie student learning outcomes. The Guiding Principles in this framework provide a call to action for increased internal accountability and a necessary redesign of the literacy learning experience.

The following guiding principles anchor Oregon's Early Literacy Framework:

- **Literacy begins at birth:** The first sounds a child may hear or see (signed) are the voices of the people in their home environment, building neural pathways and serving as the initial source of knowledge about language and their world. Families and caregivers are essential first partners in oral language development that cultivates later success in literacy and life.
- **Families and communities strengthen school-based learning:** Outside of school, children spend most of their lives at home or in the community. Parents and caregivers have a role to play in reinforcing the learning that happens at school as much as possible at home, and they must be supported as full partners in their children's literacy development. Children's literacy learning is deepened through their lived experiences, where language, culture, and identity are affirmed by families and caregivers who serve as important first teachers.
- **Every child is full of literary promise:** School systems and instructional practices must be designed around a fundamental belief that children can be taught to read and write, supported by high expectations and ongoing feedback. Adults must have a mindset that sees children as brimming with literary, cultural, and linguistic strengths ready to be seen and expanded.
- **Foundational skills matter:** Literacy is not possible without foundational skills, systematically taught in an organized order that builds on one another. Across the K-5 continuum, literacy instruction must explicitly and systematically build students' foundational skills alongside the application of vocabulary, comprehension, and writing.
- **Every child must be taught to read and write:** This responsibility is met by effective literacy instruction rooted in reading and writing research; culturally responsive and inclusive practices; Oregon's learning standards; high-quality instructional materials; and targeted support.
- **Multilingualism benefits everyone:** When families' cultural and linguistic assets become an integral part of the instructional experience, children's literacy skills and dispositions deepen. Culturally responsive instructional practices that serve multilingual students are proven strategies to accelerate and deepen learning for every child.
- **Educator knowledge and classroom practices are essential:** Teacher and leader professional learning must be comprehensive and designed to include training on foundational skills, oral language, writing, vocabulary, and background knowledge, as well as professional learning around culturally responsive practices and student belonging. Professional learning must be inclusive of literacy strategies that benefit students who experience disability, students with dyslexia, and multilingual learners. Educators are most successful when professional learning, time for planning and collaboration, as well as consistent encouragement and formative feedback, are present.

# Section 1: Student Belonging – A Necessary Condition for Literacy Learning

While evidence-based, systematic, and explicit literacy instruction is foundational for students' literacy success, research also tells us that equally important are the conditions in which this teaching and learning takes place. Building inclusive and supportive environments in schools is essential to growing readers and writers. This is a shared responsibility for all staff members. School leaders set the tone so that classroom teachers, specialists, and support staff can successfully build such environments. We must be all in to create the conditions for students to thrive.

For children to thrive, they need a sense of belonging and safety. When children experience belonging at their school, they are not only more engaged and more motivated to learn, but they are also likely to take risks in their learning and experience higher academic achievement.<sup>15</sup> Children keenly perceive how others receive them within their school environments and whether their ways of knowing, speaking, being, and learning are affirmed and reflected at school. They know and can feel when they are taught by educators who believe they can learn at high levels and when they are provided with learning opportunities that honor their language, community, and culture.

“Belonging is a fundamental human need. People search for a sense of connection with the people and places in their lives. Students spend a huge portion of their time during childhood and adolescence at school, which makes it essential that the learning environment cultivates a sense of belonging for students. A recent review by Kelly-Ann Allen and her colleagues of the academic research on belonging found evidence of our need to connect embedded in our genetic code.”

Ralph, 2022



<sup>15</sup> [REL Northwest, 2018](#)

# Culturally Responsive Practices

Culturally responsive practices are research-based approaches that provide learning environments that foster belonging and enable students to see the relevance of reading and writing in their own lives.<sup>16</sup> When students are in an environment that incorporates culturally responsive practices, they see themselves in the learning and in the curriculum, providing experiences that affirm their culture, home language, lived experiences, and identity as assets to be sustained, not erased and replaced.<sup>17</sup>

“Reading science has shown us what needs to be amplified in early reading, but for this practice to be equitable for students, we must also address the how. ... To implement foundational skills programs equitably, we also must ensure that in addition to holding high expectations for all students that all students have access to a full range of supports, culturally relevant content and practices, and aligned instructional materials.”

Pimental & Liben, 2021

School leaders who implement culturally responsive practices design school-wide systems and environments to support and learn alongside staff to deliver culturally affirming instruction. Educators who use culturally responsive practices believe that all students are capable of reading and writing and they align literacy instructional practices, text selections, and formative assessment approaches with what they know about their students. As such, culturally responsive practices require support and time for educators to explore how their perspectives and lived experiences shape decisions that influence student learning. Educators who embrace culturally responsive practices take time examining their own identities and biases. Anchored in a deep belief that all students can engage in meaningful and connected literacy, culturally responsive teachers value their students' identities, including their race, ethnicity, ability, gender, home languages, religion, and lived experiences.

Children come to school in their full humanity (inclusive of but not limited to their culture, race, ethnicity, gender identity, language, ability, sexual orientation, and religion). If educators and school systems see students through a single lens, they are only seeing a partial picture of students' lived experiences. For students to feel known, it is important that educators learn to see and acknowledge students' intersectional identities, especially when they do not reflect the dominant culture. When educators understand and reflect on their own identities and teach about identity and intersectionality,<sup>18</sup> they are more likely to embrace students' multiple identities and recognize that a single social identity does not fully represent or define a child. Culturally responsive teaching creates the experience of belonging as the neurobiologically vital state in which each student becomes available for the work of learning as well as utilizing instructional strategies to build the intellectual capacity to apply that learning in academic contexts. Educators who attend to cultural frames for information processing help to simultaneously reinforce learning and belonging. This may include, for example, using call and response, rhythm, music and storytelling as central practices in literacy acquisition. Instruction and engagement are maximized when educators leverage what they know about a child and honor their intersectional identities – this has the potential to fundamentally shift access to literacy learning.<sup>19</sup>

16 Hammond, 2015

17 Gay, 2018

18 Crenshaw, 1989

19 Gay, 2018

## High Expectations with Responsive Support

An essential tenet of culturally responsive practice is that educators hold consistently high expectations for every student, accompanied by responsive support. In literacy environments, this means providing all students, including students experiencing disabilities and multilingual learners, with access to grade-level standards,<sup>20</sup> texts, tasks, and experiences while also providing robust support for students to grow.

When educators use culturally responsive practices, they see each child’s brilliance and potential; they believe all students are capable of academic success.<sup>21</sup> These educators have been described as “warm demanders,” a term to describe an educator who expects a great deal from their students while also conveying warmth, care, and unconditional acceptance.<sup>22</sup>

In literacy instruction, this means explicit modeling of skills with ample scaffolding and practice that provides students with the tools they need to reach grade-level literacy learning goals. While instructional strategies may vary, the message in the approach to teaching with high expectations and high support is the same: every child in the classroom can achieve at high levels and participate in the cognitive richness and joy that comes from robust literate experiences.

Culturally responsive teaching means teaching with students’ “academic prowess” at the center. Zaretta Hammond describes this as changes in instruction that actually increase students’ cognition. This involves teacher expectations of student achievement, teacher comfort with challenge and productive struggle, and intentional partnership with families toward the acquisition of skills. In this way, culturally responsive instruction requires changes in instruction that actually increase student’s cognition and scaffold every child’s ability to develop stamina for problem solving and practice with synthesis and analysis of content.<sup>23</sup>

## Diverse Texts<sup>24</sup>

Culturally responsive literacy instruction includes the selection of a high-quality literacy curriculum and supplemental materials that include characters, settings, and authors which are reflective of the abilities, identities, and cultures of the full range of students and their communities. When curriculum and materials reflect and honor student identity, home languages, and culture, they contribute to a welcoming and affirming classroom environment. Throughout early literacy, concepts and characters in culturally and linguistically diverse texts also provide opportunities for students to engage in discussions about numerous topics, including their culture and identity, as well as to explore power dynamics in society and to consider how choices affect others.<sup>25</sup> This exposure encourages reflection and connection through the exploration of language, including writing, which can build relationships while inviting the understanding of someone else’s perspective.

“Seeing ourselves in stories and other texts is a powerful human need. Being able to say, ‘Look, there I am!’ feels good. It helps us know that who we are is recognized and validated and that we are not alone.”

National Council of Teachers of English, 2021

20 ODE, n.d.-g

21 [Krasnoff, 2016](#)

22 Delpit, 2013; and Hammond, 2014

23 Hammond, 2015

24 Aukerman & Chambers Schuldt, 2021

25 Schlund, 2019

Culturally responsive instruction in literacy builds awareness of various perspectives, addressing the experiences of diverse populations, while also exposing and disrupting negative stereotypes that may be present in materials. When reviewing early literacy curricula and supplemental materials, it is important to go beyond superficial representation and to carefully avoid common biases in materials that can include harmful stereotypes. Oregon’s English Language Arts instructional materials evaluation tool<sup>26</sup> as well as the Culturally Responsive Curriculum Scorecard Toolkit from New York University<sup>27</sup> are resources to support the review and evaluation of literacy curriculum materials. Each of Oregon’s Student Success Plans (African American/Black, American Indian/Alaska Native, Latino/a/x & Indigenous, and LGBTQ2SIA+)<sup>28</sup> reference the importance of culturally responsive curriculum as part of their plans.

“Books are sometimes windows, offering views of worlds that may be real or imagined, familiar or strange. These windows are also sliding glass doors, and readers have only to walk through in imagination to become part of whatever world has been created or recreated by the author. When lighting conditions are just right, however, a window can also be a mirror. Literature transforms human experience and reflects it back to us, and in that reflection we can see our own lives and experiences as part of the larger human experience. Reading, then, becomes a means of self-affirmation, and readers often seek their mirrors in books.”

Bishop, 1990

## Social and Emotional Learning

Children learn best when they are part of a positive school climate where everyone feels and is safe, seen, valued, and respected: when an asset-based orientation permeates teacher-student interactions and informs instructional decisions. Social and emotional learning<sup>29</sup> advances educational equity and excellence through authentic school-family-community partnerships that establish culturally responsive learning environments and experiences. Implementing social and emotional learning in schools creates caring, just, and affirming environments that support student learning.<sup>30</sup> Using this approach during early literacy instruction promotes student voice and agency, fosters well-being, and dedicates time and space for students to make sense of their learning and experiences. Centering the transformative social and emotional learning<sup>31</sup> constructs of identity, agency, belonging, curiosity, and collaborative problem-solving throughout students’ literacy development can provide rich context and conditions for authentic student engagement.

Incorporating culturally responsive practices and social and emotional learning are more than strategies to create the necessary conditions for student learning to flourish: they are the epitome of belonging. Classrooms with culturally and linguistically affirming learning environments, where children are encouraged and challenged, provide the most fertile soil for reading, writing, speaking, and listening to occur. The classroom centering social-emotional learning offers young learners the opportunity to take risks, consider their own learning strategies and engage in academic discourse with their peers. The necessary energy to engage and persist with challenging material is exponentially increased when that energy is fed by peer-to-peer engagement and reflective practice.

26 [ODE, 2018b](#)

27 [The Education Justice Research and Organizing Collaborative \(EJ-ROC\), 2020](#)

28 [ODE, n.d.-b](#)

29 [ODE, n.d.-e](#)

30 Durlak et al., 2011; Greenberg, 2023

31 [CASEL, n.d.](#)

### KEY TAKEAWAYS

- Belonging is a baseline condition for risk taking, thereby rendering it a nonnegotiable prerequisite for classrooms that maximize learning.
- Culturally responsive practice centers mutual relationship and care as conditions that foster a sense of belonging. “I am seen as unique and I am a part of a whole community.”
- Culturally responsive practice requires study and reflection regarding identities and cultural reference points brought to the classroom by BOTH educators and students.
- The culturally responsive educator sees and learns about each member of the classroom community. Culturally responsive literacy practice invites students' identities and cultural reference points into the daily rhythm, literacy content, strategies and discourse of the classroom.
- Culturally responsive practice provides literacy instruction centering access for all children to the experience of, and practice with, the full range of literacy skills: phonemic awareness, explicit systematic phonics, vocabulary and language development, comprehension and fluency.
- High expectations for literacy success requires time and support for educators to repeatedly examine biases as they work to ensure literacy engagement, growth and achievement for every child.
- Every child deserves access to grade-level standards. Grade-level expectations are made doable when teachers know children well enough to both set challenges and scaffold challenges through partnership with students and families.
- Maximizing literacy learning includes providing rich and complex texts inviting children to both see themselves and learn about others.
- The social and emotional skills and context provided in the classroom allow children to practice peer-to-peer listening and speaking and normalizes the “risk, fail, try again” stamina that supports literacy achievement.

### LEARN MORE

- [The Science of Reading is Culturally Responsive](#)
- [Ready for Rigor: A Framework For Culturally Responsive Teaching](#)
- [Culturally Responsive Instruction for Native American Students](#)
- [Culturally Responsive Literacy Resources](#)
- [Supporting Gender Expansive Students \(from ODE\)](#)
- [Transformative SE \(from ODE\)](#)
- [Oregon's Student Success Plans \(from ODE\)](#)

# Section 2: Family & Community Partnerships

Parents and families are the first, most important teachers in a child’s life. Before a child learns to read and write, they learn to listen and speak. Literacy learning starts at home in a child’s first three years of life – in the lap of a trusted and caring adult. Brain science tells us that children are developing these skills from birth, which is why support for children to gain early literacy skills is absolutely critical even in the first few years of life – long before they enter preschool or kindergarten.

Preschool and kindergarten-aged children learn best through intentionally planned activities and meaningful play that provides ample opportunities to explore and discover. As noted in Oregon’s Early Learning and Kindergarten Guidelines, “providing these opportunities does not preclude academics, but rather enhances the delivery of academic content through means that are most effective for young children. This approach is often referred to as developmentally appropriate practice.”<sup>32</sup>

Across almost every facet of literacy development, support and collaboration with families, tribes, and community-based organizations strengthens student literacy development and serves as accelerators for student success.<sup>33</sup> When planning how to support early literacy, it is important to consider questions such as, “How do we leverage the skills, capacities, and strengths within our community as we design learning experiences that meet the needs of our learners?” and “How might we support parents and caregivers as essential partners in their children’s literacy learning?”

This section is intended to provide guidance to district and school leaders and classroom educators to guide approaches to partnering with families regarding early literacy. It is not intended to be a comprehensive guide for community-based organizations or sovereign tribal nation leaders on how to support parents with literacy. These purposes will be met, instead, by tools that are co-created by communities for the communities they intend to serve.



<sup>32</sup> [ODE, 2017, p. 4](#)

<sup>33</sup> Dearing et al., 2004; Cronan et al., 1999

# Literacy Starts at Home

Language development is increasingly understood as a process that begins during infant brain development. This development is connected with oral language in any language, and it may be impacted by genetic, medical, and environmental factors.<sup>34</sup> The human brain is hardwired for language development.

Language development occurs before and alongside literacy development, in home environments, and throughout children’s daily experiences, including play and storytelling in the context of family traditions, first language, and culture. Engaging in conversations, over a shared meal, in the car, or in other settings, singing, cooking together, growing and harvesting food, and reading and telling stories, can help children develop oral language skills as listeners and speakers. Intentional literacy engagement before kindergarten lays the groundwork so that elementary school instruction can then advance. For multilingual learners, language development in a child’s home language in addition to English, supports both language acquisition and brain development.

Families and caregivers want their children to succeed and are one of the most important allies in advancing student learning. When families, caregivers, and communities are mobilized to support literacy learning, they can serve as champions to advocate for striving students, while creating more consistent, coordinated efforts to boost student learning.<sup>35</sup>

Together families and educators can leverage evidence-based early literacy practices inside and outside the classroom.<sup>36</sup> Engagement with books and opportunities to write and draw from an early age promotes excitement about reading and writing.<sup>37</sup> The positive interactions that young children have when they read with adults and see adults engaged in authentic reading and writing increases their motivation to read and write more.

Many evidence-based practices in support of early literacy begin at home and in early learning settings. For instance:<sup>38</sup>

- Regular, intentional, engaging practice focused on social-emotional skills.
- Strengthening children’s executive function skills using specific games and activities.
- Planned activities to build children’s vocabulary and language.
- Building on children’s knowledge of letters and sounds.
- Use of shared book reading to develop children’s language, knowledge of print features, and knowledge of the world.

34 Hutton et al., 2021

35 [Regional Education Laboratory Pacific, 2015](#). For more information about effective home-school partnerships and family engagement see Mapp & Kuttner, 2013; Epstein et al., 2018

36 [Caspé & Lopez, 2017](#). For more information on early literacy evidence-based practices at school and at home, see [Shibre, 2021](#).

37 [Michigan Department of Education, 2021](#)

38 Foorman, Lee, & Smith, 2020

## Literacy Learning Before Kindergarten

Paying attention to the literacy and learning that happens prior to children entering kindergarten ensures that children have a more seamless transition to kindergarten. Oregon’s Early Learning and Kindergarten Guidelines<sup>39</sup> are an integral resource for schools, districts, and families to consider when planning for literacy and learning before and up through kindergarten. The guidelines include a continuum of development and learning in five domains: approaches to learning, social–emotional development, language and communication, literacy, and mathematics. The guidelines are designed to:

- Align Oregon’s existing preschool guidelines and kindergarten standards and clarify the learning progressions from early childhood to elementary school.
- Support all adults who work with children by showing the progressions of what children know and are able to demonstrate in early childhood,<sup>40</sup> at kindergarten entry, and at the end of kindergarten.
- Provide caregivers with information on developmental milestones. Caregivers can use this information to provide experiences that support children’s learning and development.
- Provide a framework for early education and care providers to plan high-quality facilitated play and individualized instruction and support services.
- Inform family engagement and professional development regarding the learning and development of children.
- Strengthen the relationship between early learning and K–12 so that schools are ready for children and children are ready for school.

## Supporting Literacy Through Expanded Learning

Parents and caregivers have a role to play to supplement and reinforce the literacy learning that happens at school as much as possible at home. To create those conditions, it’s natural for parents and caregivers to need and want support, tools, and information, including knowledge of their child’s strengths and needs from educators’ perspectives. This knowledge and communication about their child helps parents make informed decisions and ensures they are empowered to support their child’s literacy development before school, after school, and during the summer.

### The Role of Libraries

Public libraries and school libraries are an integral component of children’s literacy development. Extensive research supports the role school libraries<sup>41</sup> play in the health and success of the school community.<sup>42</sup> A well-equipped library, staffed by a full-time, certified teacher-librarian, contributes significantly to gains in student learning.<sup>43</sup> High-quality school libraries staffed by trained librarians not only help students read more, but they also help them learn how to use and process information and to perform better on achievement tests.<sup>44</sup> Levels of library funding, staffing levels, collection size and range, and the librarian’s instructional role all directly impact student achievement, regardless of student socioeconomic status.

39 [ODE, 2017](#)

40 For more information on learning development for children ages birth to five, see [Early Childhood Learning and Knowledge Center, 2022](#)

41 [Oregon Library Association, n.d.](#)

42 [Library Research Service, 2013a](#)

43 [Library Research Services, 2013b](#)

44 [Lance & Kachel, 2018](#)

One purpose of school libraries is to provide access to books, with research confirming that access is associated with raising student test scores in all aspects of literacy.<sup>45</sup> Access to culturally relevant and responsive books fosters an early love of learning and a sense of belonging while also positively affecting reading achievement and appears to offset the impact of poverty. This research points to the importance of ensuring that all students, no matter their socioeconomic status, have equitable access to library resources because all aspects of literacy improve when children have access to books.<sup>46</sup> With reliable access to diverse books, students are more likely to read them and to read them for longer periods of time. School libraries can bridge the opportunity gap for students from historically and systemically marginalized communities by providing equal access and resources for learning through culturally relevant and responsive books and instructional materials. Cultivating a library that is welcoming and creates an enriching learning environment ensures that students have ready access to culturally relevant and responsive books.<sup>47</sup>

Another purpose of school libraries is for teacher-librarians to provide valuable instruction and support by responding to needs and requests from teachers and students, as well as providing much-needed instruction in the areas of information literacy, media literacy, digital citizenship, and more. Just as with content area instruction, teacher-librarians rely on standards when designing instruction (see [Appendix B: Companion Guidance Documents & Resources](#)).

In addition to school libraries, public library programs are an excellent resource for teachers, students, parents, and the broader community. Public libraries serve many roles in their communities and offer early learning and literacy engagement opportunities, summer and after-school literacy programs for students, and adult literacy learning.

## Hours Outside the School Day<sup>48</sup>

Reading and writing before and after school are important for literacy development. Educators can encourage children to spend more time reading and writing outside of the school day by creating a culture of literacy that extends beyond the school building. To do this, schools can make books available for borrowing, encourage book reviews and student writing to be shared during school announcements, and organize book clubs and writing groups as after-school activities. Guiding students to read independently or with a buddy while riding a bus to and from school is another way for a school to encourage more time for reading. Educators can also provide families with strategies to use when reading with their children after school. Some strategies include reading aloud together, providing writing materials to use at home, and giving guidance on how to talk with children about what they read.

Collaborating with community systems of care (e.g., tribal governments, community-based organizations, libraries, parks and recreation centers, culturally-specific organizations, early learning hubs, STEM/STEAM hubs, housing agencies, area chambers of commerce, business and industry, public agencies) that provide opportunities for formal and informal learning is another way to extend literacy learning outside the classroom. Examples of how schools can support these activities include announcing library events or working with local businesses (such as barbershops, hair salons, and laundromats) to provide books for children to read while they wait.<sup>49</sup>

45 [Scholastic, 2016](#)

46 [Library Research Service, 2013a](#); [Gretes, 2013](#)

47 [ODE, 2023](#)

48 [Michigan Department of Education, 2021](#)

49 For more examples of how to build and sustain school-community partnerships, see the Colorado Education Initiative's [toolkit](#).

## Literacy During Summer and School Breaks

Schools can support student literacy throughout the year during summer and school break by providing independent reading and extra support for literacy skills during summer and school break time through informal and formal reading opportunities. Summer programs may be perceived and designed to feel like punishment to students who have not been adequately supported in their literacy development. It is therefore critical that summer programs be intentionally designed to counter that narrative. In part, effective strategies may involve creating programs that are fun and engaging to student interests, and which also include a literacy component.

Encouraging students to find opportunities to read every day is one of many ways informal learning can happen outside the classroom. Daily reading outside of school is critical, with young students reading with an adult and older students reading independently. To strengthen reading skills, it is recommended that children in grades 2 and below read with an adult for at least 20 minutes daily outside of school time; while children in grades 3 and above read at least 30 minutes daily outside of school time, either with or without an adult. This additional reading builds fluency, vocabulary, stamina, and background knowledge, all necessary to develop literacy skills. Families can be encouraged to support their child's reading without concern for the length of text or genre. Novels, short stories, comic books, cooking recipes, and poetry provide reading opportunities.<sup>50</sup>

Strategies for supporting student literacy year-round include:<sup>51</sup>

- Local libraries can provide book suggestions and engaging summer reading programs that encourage independent reading throughout the year.
- Teachers can provide personalized lists of books students may like to read that connect to their interests.
- Families and students can share reading experiences, practice skill development that was learned during class, and discuss prompts for older children who can read independently.

Formal reading programs involve face-to-face learning, virtually or in person. Summer reading programs can be offered by the school or school partners, like community-based organizations and libraries. Summer learning programs provide unique opportunities to build relationships, spark joy, and deepen natural curiosity to promote learning, growth, and success for every student. Well-rounded summer learning is individualized to a student's assets, needs, and goals; intentional to meet learning goals and apply evidence-based instructional methods; and integrated into rigorous high-quality course content and meaningful study.<sup>52</sup>

50 [Michigan Department of Education, 2021](#)

51 [Michigan Department of Education, 2021](#)

52 [ODE, 2021c](#)

### KEY TAKEAWAYS

- Parents and families are the first, most important teachers in a child’s life. Before a child learns to read and write, they learn to listen and speak.
- Language development begins as the brain develops in response to genetic, medical, and environmental factors.
- Parents and caregivers have a role to play to supplement and reinforce the literacy learning that happens at school as much as possible at home. To create those conditions, it’s natural for parents and caregivers to need and want support, tools, and information, including knowledge of their child’s strengths and needs from educators’ perspectives.
- Paying attention to the literacy and learning that happens prior to children entering kindergarten ensures that children have a more seamless transition to kindergarten.
- Across almost every facet of literacy development, support and collaboration with families and community-based organizations strengthens student literacy development and serves as accelerators for student success.<sup>53</sup>
- Engagement with books and opportunities to write and draw from an early age promote excitement about reading and writing.
- Encouraging children to spend more time reading and writing outside of the school day can begin with creating a culture of reading and writing inside the school building.

### LEARN MORE

- [Toolkit: Tribal Best Practices](#)
- [Ways to Become More Culturally Responsive in Engaging American Indian and Alaska Native Families](#)
- [Tips for Supporting Reading Skills at Home](#)
- [Honoring Family in the Class](#)
- [Early Learning and Kindergarten Guidelines \(from ODE and DELC\)](#)
- [How Parents and Families Support Oral Language and Vocabulary](#)
- [Toolkit: Families and Schools Partnering for Children’s Literacy Success](#)
- [Addressing Challenged Materials in K-12 Education \(from ODE and State Library of Oregon\)](#)
- [Family Engagement Resources \(from ODE\)](#)
- [Toolkit: Community Engagement \(from ODE\)](#)
- [Toolkit: Jump Start Kindergarten \(from ODE\)](#)

53 Dearing et al., 2004; Cronan et al., 1999

# Section 3: Oral Language as the Root of Literacy Development

Language is essential for children as they make sense of the world, develop relationships with others, and understand their role in their homes, schools, and communities.<sup>54</sup> When educators understand the role of oral language and dialect in literacy acquisition, they can leverage students’ oral language skills in any language or variation of English. Educators further students’ literacy development by intentionally providing scaffolding to support the simultaneous development of language and literacy skills. Skilled educators map new learning onto existing knowledge, thus building on linguistic strengths and accelerating literacy learning.

## The Role of Oral Language in Early Literacy Development

Literacy development is increasingly understood as a process that begins as the brain develops language – hence the increasingly familiar refrain “literacy begins at birth.” As infants hear more sounds from their home language(s), their brain connections become stronger, and they become more adept at recognizing the sounds of their home languages. These first sounds a child may hear or see (signed) are the voices of the people in their home,<sup>55</sup> which serve as the initial source of knowledge about language and their world. In turn, learning to read involves learning about print, specifically how words known from speech are represented in a visual-graphical code or written language.<sup>56</sup>



54 [Herrera et al., 2022](#)

55 Seidenberg, 2017

56 Seidenberg, 2017

## EARLY LITERACY FOR DEAF AND HARD OF HEARING STUDENTS

“Early and consistent access to a language is vital to its acquisition and continued development. Hearing loss complicates access to language. However, there are several strategies that are most often employed to build communication skills. There is no single test or exam that can determine which strategy is right for an individual. Understanding and spending time exploring options will allow the child to own the strategy best suited for them.”<sup>57</sup>

The Outreach Center for Deafness and Blindness, 2017

See also: [Early Reading for Young Deaf and Hard of Hearing Children: Alternative Frameworks and Foundations for Literacy: An Early Literacy Intervention for Deaf and Hard-of-Hearing Children](#)

A child’s ability to read and write is predicated on oral language because of the primary role oral language plays in laying the groundwork for foundational literacy skills.<sup>58</sup> In fact, research supports that reading, writing, and oral language are highly related.<sup>59</sup> It is also true that oral language is highly correlated with comprehension, which can be explained by the overlap in word recognition and oral language skills.<sup>60</sup> Students’ comprehension of spoken language is critical for their reading comprehension — the ultimate purpose of reading. This is also true of cultivating students’ writing ability.<sup>61</sup> While some children may develop oral language skills quickly and effortlessly, others may struggle with acquiring oral language. Factors such as genetics, environment, and early experiences all play a role in a child’s language development. Children who experience disability have brilliant minds that can process information at different speeds, rates, and patterns. This can create what systems frame as developmental delays or presents challenges that are best met through differentiated and inclusive instruction. It is important for parents, caregivers, and educators to be aware of these individual differences and provide appropriate intervention and support to help children reach their full potential in language acquisition. These needs should be considered within the context of each individual student’s needs and strengths, as described in [Section 8: Reaching All Learners](#). The larger context of how oral language is situated within, and interacts with, other elements of literacy is explored further in [Section 4: Reading Models Based in Research](#), [Section 5: Foundational Skills](#), and [Section 6: Writing, Reading Comprehension, Vocabulary, & Background Knowledge](#).

## Oral Language Skills and Text-Based Language Skills are Interrelated

Oral language includes semantics, which is essential to vocabulary development. It also includes phonemic awareness, which is critical to reading. When children learn to blend sounds into words and segment words into sounds (phonemic awareness) in English, they can then connect the sounds with corresponding letters (phonics) to sound out words and begin to master the alphabetic principle to identify words accurately. Accurate decoding (reading) and encoding (spelling) of words leads to high-quality representations of words in memory so that the words can be recognized instantly.<sup>62</sup> Such efficient recognition is critical to reading fluency and to comprehension.

57 [The Outreach Center for Deafness and Blindness, 2017](#)

58 [Foorman et al., 2016](#); Seidenberg, 2017; National Research Council, 1998

59 Mehta et al., 2005; Kim et al., 2011

60 Foorman et al., 2018b; Lonigan et al., 2018

61 [Massachusetts Department of Elementary and Secondary Education \(DESE\), n.d.](#)

62 Dehaene, 2009; Ehri, 2020; Perfetti & Helder, 2022; Seidenberg, 2017

## Multilingualism Supports Oral Language & Literacy

A growing number of Oregon’s children are learning more than one language resulting in multilingualism being one of their many strengths. There are many cognitive benefits to learning multiple languages. Multilingual students outperform monolingual students on tasks that use cognitive flexibility.<sup>63</sup> Multilingual students’ brains get an extra workout because navigating more than one language requires the brain to use problem-solving and task-switching skills. The multilingual brain, therefore, is wired for powerful literacy and language learning.

"Children who are learning English as a second language will become literate more easily if they have a strong foundation in their home language."

National Association for the Education of Young Children & International Reading Association, 2009

Effective literacy instruction is rooted in an asset-based approach in which teachers value the linguistic strengths students bring to the classroom, while also paying close attention to student instructional needs. For multilingual students developing two or more languages, "this plurality of languages provides a multi-textured way of viewing, understanding, and interacting in and with the world...literacy development is nested within this larger picture of first and second language acquisition and use. Children’s oral language practice and development in all languages is foundational to their literacy development."<sup>64</sup>

## An Expansive Perspective of Oral Language

Oral language plays a critical role in learning about self, culture, and tradition. When educators learn about the cultural and linguistic backgrounds of the children in their care and learn from families, they can then draw connections, build from linguistic strengths, and better support a student who may not yet be fluent with written text.

## Since Time Immemorial: Honoring Indigenous Language and Knowledge

Indigenous communities have centered story and oral language since Time Immemorial, passing information and carrying meaning and connection over generations without it being transcribed or written. These Native stories share traditional knowledge and connection to the land and help to carry culture and important teachings; such stories are often connected to seasons and the natural world. Oral tradition has kept Native languages and ways of knowing alive for thousands of years. Due to colonization and forced assimilation, the number of surviving Oregon tribal languages and dialects has dwindled from an original base of approximately one hundred to about eight. Tribal Elders often say that when a language goes extinct, a library dies.<sup>65</sup>

"Our Language is as old as time itself. For countless generations our people lived out their lives speaking our words. In all that time, our words were never written. They were carried in the hearts and minds of our ancestors. They were learned by each generation and in turn taught to the next."

Lewis, 2018

63 [Barac et al., 2014](#)

64 [Herrera et al., 2022](#)

65 [Lewis, 2018](#)

Efforts such as Native language revitalization programs led by the [Confederated Tribes of Grand Ronde](#) and the [Northwest Indian Language Institute at the University of Oregon](#) as well as Oregon’s Tribal History Shared History<sup>66</sup> curriculum, underscore the importance of honoring Indigenous languages and restoring value and shared understanding about the role of oral language and survivance<sup>67</sup> in Native culture. For example, the Tribal History Shared History curriculum includes a 4th-grade lesson<sup>68</sup> on the importance of oral storytelling: “Indigenous stories provide essential knowledge required to sustain and maintain certain ways of knowing and being. Each tribal nation has its own oral history, and these histories are just as valid as written records. Oregon Tribal Nations work hard to protect their lifeways and celebrate their ways of being and knowing.”<sup>69</sup>

## The Importance of Storytelling

Storytelling has the power to create connections between humans, animals, and the land, to pass on traditions, entertain, and affirm identity. A uniquely situated form of literacy, oral storytelling’s power is found through gestures, emotions, and voice. Many cultures use oral traditions to recite poetry, chants, and to connect through song. For the identities of all children to be fully seen and honored in early grades, there is an essential role for story and oral history. In early literacy, the cadence, flow, and rhythm of how the story is told supports early language development for young children.<sup>70</sup> A research study from the Frank Porter Graham Child Development Institute emphasizes the importance of recognizing and capitalizing on storytelling skills to help young African American children with their early reading development.<sup>71</sup> As Gholdy Muhammad explains within her historically and culturally responsive literacy framework, as children learn and grow, they engage in extensive identity exploration, trying to make sense of who they are, who others say they are, and who they desire to be. To support this effort, educators can structure literacy experiences that hold space for storytelling while centering learning opportunities that affirm and bring to life students’ (and their ancestors’) histories, cultures, and traditions.<sup>72</sup> Using oral language to honor cultural identity while simultaneously creating foundational literacy skills is critical for each and every child.

## Recognizing and Honoring Dialects

It is also important to recognize and honor children developing fluency in various dialects of English. They bring unique and valuable strengths to literacy learning, such as translanguaging, by “accessing different linguistic features or various modes of what are described as autonomous languages, in order to maximize communicative potential.”<sup>73</sup> For example, when a learning environment cultivates language varieties such as African American English, students’ bicultural and bidialectal identities and lived experiences are affirmed.<sup>74</sup>

It is important that teachers understand that language varieties are linguistically equal, even when they are not socially equal.<sup>75</sup> “Standard English” is not a language. It is one variety of English, and it is not linguistically superior to other varieties. Linguistic complexity is a profound area of research, often illuminating ways in which regional dialects or situational dialects require an amazing array of cognitive and social skills. This is true across race, social class, gender, and region.<sup>76</sup>

66 [ODE, n.d.-h](#)

67 Sabzalian, 2019

68 [ODE, n.d.-c](#)

69 [ODE, n.d.-c](#)

70 [Programmatic Assistance for Tribal Home Visiting \(PATH\), n.d.](#)

71 Gardner-Neblett & Iruka, 2015

72 Muhammad, 2020

73 [García, 2009a](#)

74 [Washington & Seidenberg, 2021](#)

75 Darder, 1991

76 [Grieve, 2022](#)

“Most languages have several within-language varieties. An inclusive way to think about language varieties is that they occur along a continuum from those that differ little from the general variety to those that are more distant. This framing includes all communication practices across all speakers and does not consider one variety to be superior. It allows us to put languages and speakers in their proper perspective as equally valued, especially as we support children learning to read and write. All children need to have the skills to make linguistic choices across contexts: formal, informal, home, school, speaking, reading, or writing.”

Washington & Seidenberg, 2021

Awareness of early literacy strategies supporting multidialectal students is vital for teaching, learning, and assessment. These strategies allow educators to promote students' academic achievement while recognizing and honoring the value of the student's home dialect.

#### KEY TAKEAWAYS

- Literacy development is increasingly understood as a process that begins as the brain develops language – hence the increasingly familiar refrain “literacy begins at birth.”
- Learning to read involves learning about print, specifically how words known from speech are represented in a visual-graphical code or written language.<sup>77</sup>
- A growing number of Oregon’s children are learning more than one language and can add multilingualism as one of their many strengths.
- Transformative literacy instruction is rooted in an asset-based approach, in which teachers value the linguistic strengths students bring to the classroom.
- Indigenous communities have centered story and oral language since Time Immemorial, passing information and carrying meaning and connection over generations without it being transcribed or written.
- All varieties of English (dialects) are valid, valued, and deserve to be recognized as such.
- Oral language plays a critical role in learning about self, culture, and tradition. A child’s ability to read and write is predicated on oral language because of the primary role oral language plays in laying the groundwork for foundational literacy skills.<sup>78</sup>

#### LEARN MORE

- [Early Learning and Kindergarten Guidelines \(from ODE\)](#)
- [Oral Language | National Association of Education of Young Children](#)
- [Telling and Retelling Stories: Learning Language and Literacy](#)
- [Supporting Early Language Development for Diverse Learners](#)

<sup>77</sup> Seidenberg, 2017

<sup>78</sup> [Foorman et al., 2016](#); Seidenberg, 2017; National Research Council, 1998

# Section 4: Reading Models Based in Research

Learning to read and write is complex; yet, literacy researchers have made significant strides in working to demystify these processes. The science of reading represents over five decades of research, inclusive of studies across the world and spanning multiple disciplines (i.e., cognitive psychology, developmental psychology, education, implementation science, linguistics, neuroscience, school psychology). This body of knowledge informs how reading skills develop and describes the cognitive processes that occur in the brain when students learn to read. It also sheds light on why some students have difficulty, how educators can most effectively assess and teach, and how data can be used to improve student outcomes.

## SCIENCE OF READING

### The Science of Reading

The Basics

There are so many pieces to the Science of Reading that it can be difficult to know where to start. Here are a few highlights about what the Science of Reading IS and what it IS NOT. This knowledge will help you on your journey to teaching all children, including those with diverse needs and cultural backgrounds, to read.

**What it IS**

<b>A Collection of Research</b> Research, over time, from multiple fields of study using methods that confirm and disconfirm theories on how children best learn to read.	<b>Teaching Based on the 5 Big Ideas</b> <b>Phonemic Awareness</b> - The ability to identify and play with individual sounds in spoken words. <b>Phonics</b> - Reading instruction on understanding how letters and groups of letters link to sounds to form letter-sound relationships and spelling patterns. <b>Fluency</b> - The ability to read words, phrases, sentences, and stories correctly, with enough speed and expression. <b>Vocabulary</b> - Knowing what words mean and how to say and use them correctly. <b>Comprehension</b> - The ability to understand what you are reading.	<b>Ever Evolving</b> There is new research and evidence all the time. As populations, communities, and approaches evolve, so should practice.
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**What it IS NOT**

<b>A program, an intervention, or a product that you can buy.</b> The Science of Reading could be considered an approach to teaching reading that is based on decades of research and evidence. It is NOT a specific program.	<b>Phonics-based programs that drill phonics skills.</b> Phonics is an integral part of teaching reading based on science, but it is just one of the five big ideas that should be taught so all children can learn to read.	<b>Complete and no more study needs to be done.</b> As with any science, it is never complete. We can always know more. More study happens all the time and researchers, teachers, and families can work together to bring the best research into classrooms.
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Science of reading is aligned with “neurological and cognitive science studies of how brains process written words,”<sup>79</sup> and includes a broad collection of research from multiple fields of study including cognitive science, learning sciences, literacy research, and instructional science and research broadly. The “science of reading” captures this comprehensive, ever-evolving, research base that informs literacy instruction for all learners.<sup>80</sup>

*Within Oregon’s Early Literacy Framework, this definition of the science of reading reinforces the essential role it plays in informing literacy instruction. Reading research provides fundamental information about reading and it deserves to be recognized as such. Furthermore, it underscores the complexity and richness of literacy instruction. Amanda P. Goodwin, co-editor of the academic journal Reading Research Quarterly, describes the science of reading as: “not just phonemic awareness, phonics, reading fluency, vocabulary, and comprehension but also language development, motivation, dyslexia, the reading of digital texts, multilingual literacy, the literacies of Black students and other historically minoritized student groups...”<sup>81</sup>*

*Ultimately, the term science of reading can be interpreted in divisive ways or in informative ways; the goal in this framework is to use the science of reading as a term to bring clarity and common ground to move Oregon forward in supporting the literacy development to all students.*

Figure 2. The Science of Reading

79 [Shanahan, 2021](#)  
 80 [National Center on Improving Literacy, 2022](#)  
 81 [Heller, 2022](#)

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# Five Models of Reading and the Essential Components of Literacy

The following five reading models reflect past and present research findings and hold important insight into how children acquire literacy skills that are paramount for shaping and reshaping how literacy instruction is approached and designed. While there are many models of reading, these are commonly used models to illustrate the core ideas of reading research:

1. The Five Pillars of Reading
2. The Simple View of Reading
3. Scarborough’s Rope
4. The Four-Part Processing Model
5. The Active View of Reading

These models are not methods, techniques, or programs; however, they help educators understand the interrelated components, or smaller parts, that comprise reading and writing. No single reading model captures all of the components; for this reason, it is important to draw from multiple models.

Several components of literacy from across these models are reinforced throughout the framework: oral language, concepts of print, phonological and phonemic awareness, phonics, alphabetic principle, fluency, automaticity, background knowledge, vocabulary, text comprehension, and writing (written expression and spelling).

This section describes how each model contributes to the interplay and interdependence of these components. [Section 3: Oral Language as the Root of Literacy Development](#), [Section 5: Foundational Skills](#), and [Section 6: Writing, Reading Comprehension, Vocabulary, & Background Knowledge](#) examine more closely the components elevated by these models, describe the relationship between the components, and support the connection of theory to practice by highlighting instructional implications for each.

## 1. The Five Pillars of Reading

In 2000, the National Reading Panel identified five components as part of a comprehensive system for English literacy instruction:

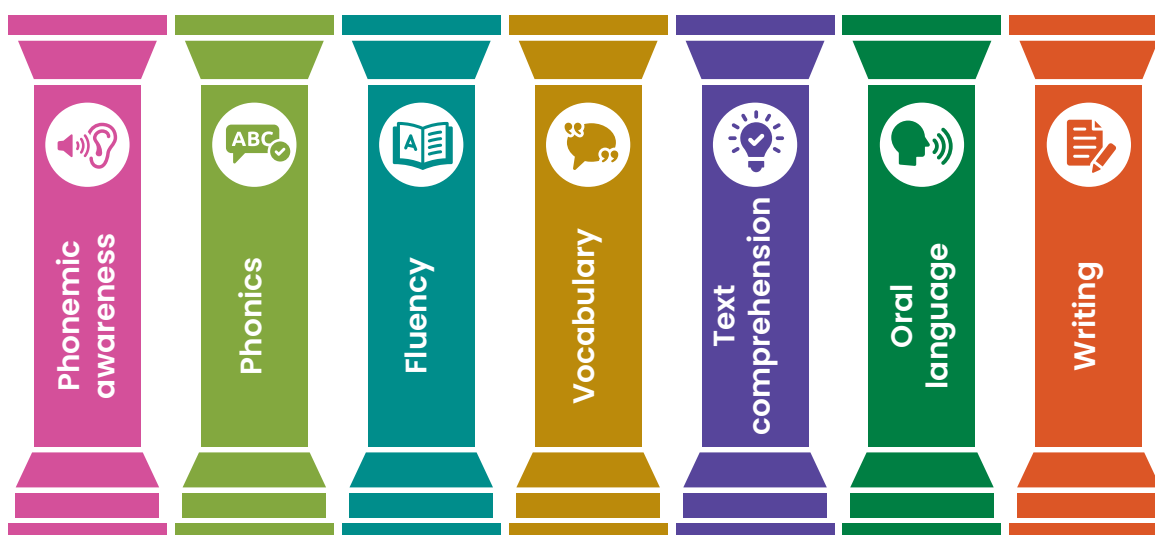
- **Phonemic awareness:** an awareness of, and the ability to, manipulate the individual sounds (phonemes) in spoken words.
- **Phonics:** the study and use of sound/spelling correspondences and syllable patterns to help students read written words.
- **Fluency:** reading text with sufficient speed, accuracy, and expression to support comprehension.
- **Vocabulary:** the body of words and their meanings that students must understand to comprehend text.
- **Text comprehension:** the ability to make meaning using specific skills and strategies, vocabulary, background knowledge, and verbal reasoning skills.

Over the last two decades, research has built on the above original components to include oral language and written expression as additional ingredients to cultivate students' literacy development:<sup>82</sup>

- **Oral language:** "Sometimes called spoken language, oral language includes speaking and listening—the ways that humans communicate with one another. Oral language skills provide the foundation for word reading and comprehension. They are at the heart of listening and reading comprehension, serving as a predictor for both."<sup>83</sup> (See [Section 3: Oral Language as the Root of Literacy Development](#))
- **Writing (written expression and spelling):** Writing was added, "due to the reciprocal relationship between written expression and text comprehension."<sup>84</sup> (See [Section 6: Writing, Reading Comprehension, Vocabulary, & Background Knowledge](#))

Figure three represents the original five pillars of reading and two additional components.

**Figure 3. Pillars of Reading (adapted to include writing and oral language)**



## 2. The Simple View of Reading

As its name implies, this model reinforces a straightforward interpretation of reading that continues to inform a core conceptual idea around reading in which decoding and language comprehension are both essential to reading comprehension and skilled reading. This model is widely used and referenced in relation to the science of reading and empirically validated in over 150 scientific studies.<sup>85</sup> It includes two key components, decoding (or word recognition) and language comprehension (the ability to understand spoken language). Both must be present for reading comprehension to be possible. This reinforces the importance of early oral language development composition, both before and during the early grades – beginning formal schooling with strong oral language paves the way for reading comprehension as students begin to learn how to decode and recognize words. Figure 4 represents the Simple View of Reading.

<sup>82</sup> [Graham & Hebert, 2011](#)

<sup>83</sup> [Literacy How, 2020](#)

<sup>84</sup> [Colorado Department of Education, 2020](#)

<sup>85</sup> [The Reading League, 2022](#)

Figure 4. Simple View of Reading



Based upon more recent advances in reading research, the decoding "side" of the equation may be referred to as fluent word reading, acknowledging the importance of automaticity and fluency in word recognition.<sup>86</sup>

The Simple View is most useful for understanding the abilities that underlie early reading comprehension and may help in understanding both how to design effective reading instruction and the source of reading struggles for some students. Intervention for children who are not yet skilled readers is most effective when it addresses the specific area of need, which may be decoding, language comprehension, or both.<sup>87</sup> For example, the Simple View can also inform an understanding of skilled reading and three different types of reading difficulties:<sup>88</sup>

- A typically developing reader has both strong word recognition skills and strong comprehension of oral language. This leads to strong reading comprehension or skilled reading.
- Students who are not yet strong readers need support in both areas.
- Hyperlexic students can read words at a level above their oral language comprehension. These students read quickly and accurately, but have difficulty comprehending what they just read.
- The term dyslexic is used to refer to students with strong language comprehension, but weak word recognition (decoding) skills.

Identifying students' individual needs through this lens can help inform teachers' instructional next steps and ensure that interventions are appropriately matched to a student's area(s) of need. For more information on supporting students with reading difficulties, see [Section 8: Reaching All Learners](#).

#### THE SIMPLE VIEW OF READING AND MULTILINGUAL LEARNERS<sup>89</sup>

Research has shown that English learners can achieve word reading proficiency that matches their English monolingual peers when they receive evidence-based instruction that responds to their linguistic strengths and needs.<sup>90</sup> While all students should receive instruction in both fluent word reading and language comprehension to secure solid reading comprehension,<sup>91</sup> multilingual learners benefit from more of both, with considerations for how a focus on those skills is culturally responsive and ensures a well-rounded learning experience.

86 [DESE, 2022b](#)

87 Snow, 2018

88 Gough & Tunmer, 1986

89 [DESE, 2022b](#)

90 Vargas et al., 2021

91 Verhoeven & van Leeuwe, 2012

### 3. Scarborough's Reading Rope<sup>92</sup>

Scarborough's Reading Rope is a visual metaphor for developing skills over time that expands upon the essential components of the Simple View of Reading. This model asserts that, for either of the two essential components of reading (decoding and language comprehension) to develop successfully, students need to be taught the skills necessary for each of those two domains. In their development, these subcomponents intertwine and become increasingly strategic and automatic over time to develop fluent, skilled reading. This interweaving of skills can occur early in literacy development and continues as students become more skillful readers.

Figure 5. Scarborough's Rope Representation<sup>93</sup>

#### Language Comprehension

Background Knowledge  
(facts, concepts, etc.)

Vocabulary  
(breadth, precision, links, etc.)

Language Structures  
(syntax, semantics, etc.)

Verbal Reasoning  
(inference, metaphor, etc.)

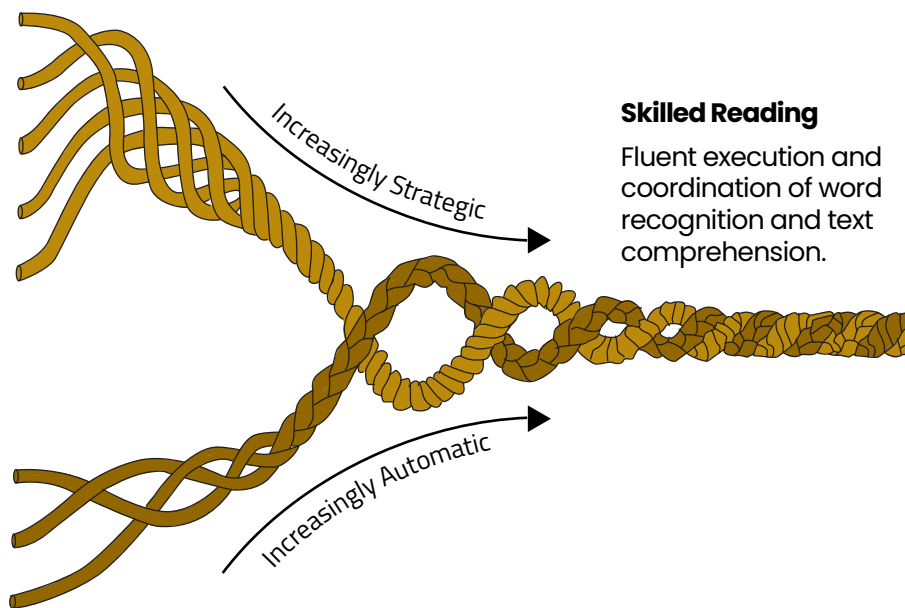
Literacy Knowledge  
(print concepts, genres, etc.)

#### Word Recognition

Phonological Awareness  
(syllables, phonemes, etc.)

Decoding  
(alphabetic principle,  
spelling-sound  
correspondences)

Sight Recognition  
(of familiar words)



Recent research supports that reading, writing, and oral language are so highly related that they can be thought of as a single literacy category<sup>94</sup> and that proficiency in reading comprehension can be explained by the overlap in word recognition and oral language skills.<sup>95</sup> This research expands the Simple View of Reading and also provides an empirical base for the strands of language and word recognition that become interwoven in Scarborough's reading rope.<sup>96</sup> Importantly, this research also expands the five components of the National Reading Panel Report<sup>97</sup> to include oral language (not just vocabulary) and writing (spelling and written expression).

92 Scarborough, 2001

93 [Duke & Cartwright, 2021](#); Scarborough, 2001

94 Mehta et al., 2005

95 Foorman et al., 2018b; Lonigan et al., 2018

96 Gough & Tunmer, 1986; Scarborough, 2001

97 [National Reading Panel, 2000](#)

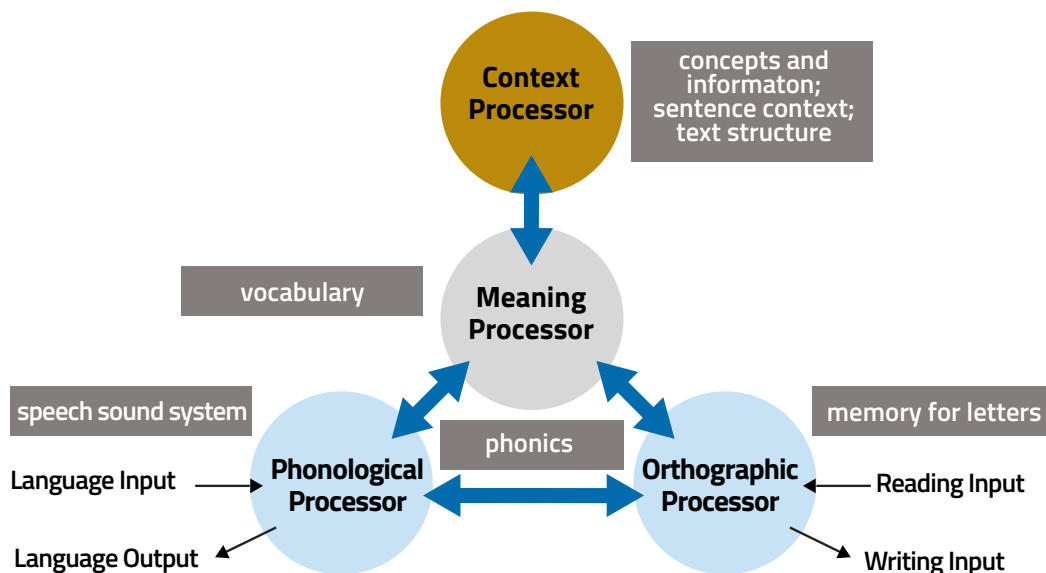
## 4. The Four-Part Processing Model<sup>98</sup>

The Four-Part Processing Model for word recognition is a model that illustrates how the brain reads or recognizes words and can be useful in guiding educators' understanding of the underlying processes involved in word recognition, language comprehension, and overall reading comprehension. The model describes four processors, or areas in the brain, that are active when reading:

- **Phonological Processor:** Detects, recalls and understands sounds that make up spoken words and controls the production of sounds and words in spoken language.
- **Orthographic Processor:** Recognizes, stores and recalls the letters and combination of letters used in written language and stores print information needed to efficiently recognize and recall words when reading and writing/spelling.
- **Meaning Processor:** Interprets word meanings and organizes words into meaningful categories according to spelling patterns, concepts, word relationships, word meanings, and; meaningful parts of words
- **Context Processor:** Supports the meaning processor by interpreting words based on other language in the text, experiences, and background knowledge

The orthographic and phonological processors first work together to decode a word by connecting the word's speech sounds to its symbols (phonics). Once the word is read, the meaning processor considers all possible definitions of the word (vocabulary), while the context processor helps support the meaning processor by applying context and background knowledge about what is being read.

Figure 6. **Four Part Processing Model of Word Recognition**<sup>99</sup>



The Four Part Processing Model helps to illustrate how different elements of instruction support the different brain processes required for reading and writing, and can inform how to provide additional support for students struggling to read.

<sup>98</sup> Seidenberg and McClelland, 1989 and Dehaene 2013

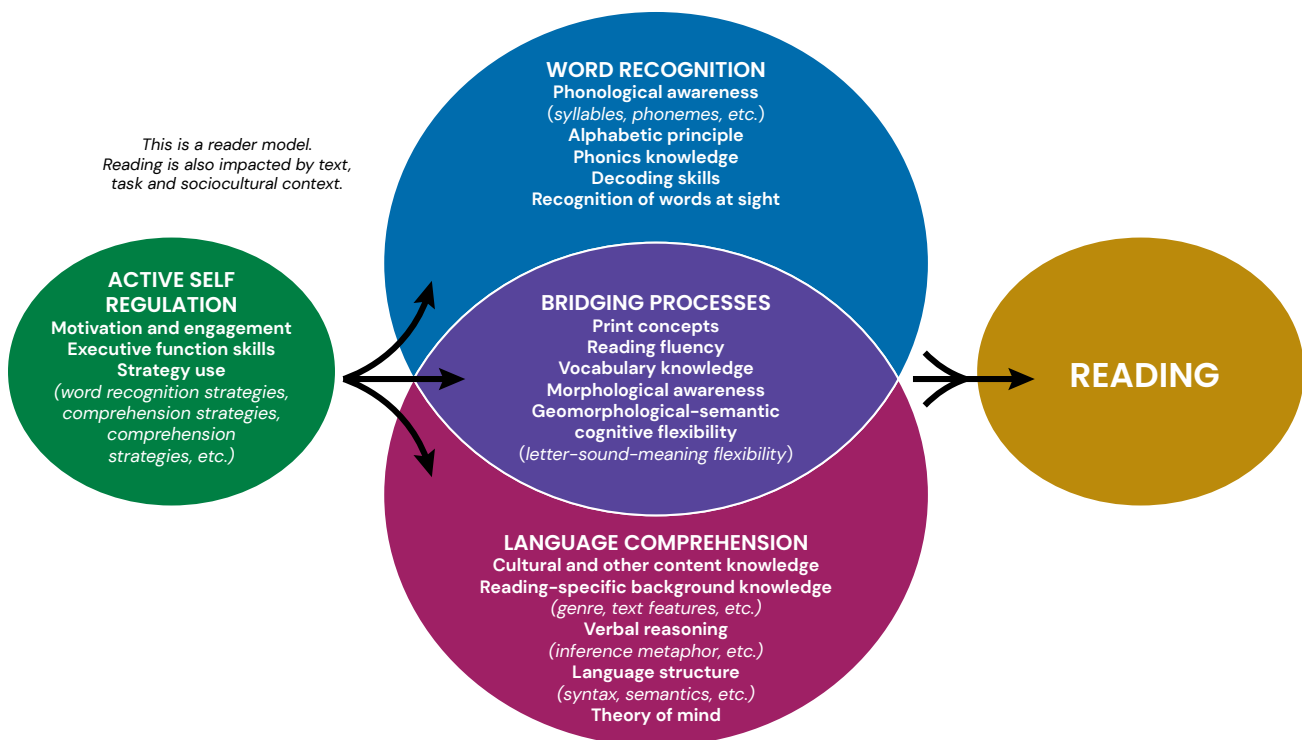
<sup>99</sup> [Wyoming Department of Education, 2019, p.13](#)

## 5. The Active View of Reading

The Active View of Reading is a recent model of reading that expands the Simple View of Reading to add text, task, and sociocultural context.<sup>100</sup> This model also incorporates research on executive function skills<sup>101</sup> and comprehension monitoring<sup>102</sup> and depicts a multidimensional context for literacy.<sup>103</sup> At its core is the belief that more than just word recognition and language comprehension are needed for children to develop as “active readers” (readers with the literacy skills to successfully navigate text while feeling empowered and engaged). Key ideas supported by the Active View of Reading follow:

- In addition to decoding and language comprehension, executive function skills, comprehension strategy use, and motivation support reading comprehension.
- Reading processes, such as vocabulary and morphological awareness (understanding parts of words, like Latin roots or prefixes), help bridge decoding and language comprehension.
- Cultural knowledge and content knowledge are constructs that contribute to reading success.

Figure 7. Active View of Reading representation<sup>104</sup>



This model reinforces a bridging process between word recognition and language comprehension development. In other words, the relationship between word recognition and language comprehension represents an equally important function of reading. For example, a strong vocabulary improves the ability to decode unfamiliar words. Similarly, knowledge of another language may influence word recognition in English.<sup>105</sup>

100 [Duke & Cartwright, 2021](#)

101 Kieffer & Christodoulou, 2019

102 Castles et al., 2018; [Shanahan et al. 2010](#)

103 [Duke & Cartwright, 2021](#)

104 [Duke & Cartwright, 2021](#)

105 [Duke & Cartwright, 2021](#)

The Active View also reinforces the role of active self-regulation in the reading process and reinforces the larger sociocultural context of reading. Competent and confident readers not only have strong word recognition and language comprehension skills, they actively self-monitor in order to apply skills and strategies while they read so that they can actively make meaning and read fluently. Most importantly, the Active View of Reading model provides substantial grounding for culturally responsive practice as an influencing factor in learning to read and write.<sup>106</sup>

#### KEY TAKEAWAYS

- Reading research, often termed “the science of reading,” studies how reading skills develop and helps us to understand what happens in the brain when students learn to read.
- The following five reading models reflect past and present research findings and hold important insight into how children acquire literacy skills that are paramount for shaping and reshaping how literacy instruction is approached and designed:
  - The Five Pillars of Reading
  - The Simple View of Reading
  - Scarborough’s Rope
  - The Four-Part Processing Model
  - The Active View of Reading
- Generally, these reading models emphasize the interaction between:
  - word-identification, and
  - language comprehension.
- This interaction results in reading comprehension through:
  - knowledge of the English writing system;
  - linguistic knowledge;
  - background knowledge; and
  - the type of text, nature of the task, sociocultural context, and executive functions.
- Executive functions of memory and attention can be enhanced by teaching self-monitoring strategies and motivating students to engage with text.
- A major roadblock to comprehending text is fluency. These models emphasize the importance of accurate and efficient word identification and recognition so that executive skills can be devoted to comprehending text.

#### LEARN MORE

- [Which Reading Model Would Best Guide School Improvement?](#)
- [The Impact of Word Knowledge Instruction on Literacy Outcomes in Grade 5](#)
- [The Science of Reading Progresses: Communicating Advances Beyond the Simple View of Reading](#)
- [What is the Science of Reading?](#)

<sup>106</sup> [Duke & Cartwright, 2021](#)

# Section 5: Foundational Skills

Foundational skills refer to the tightly interrelated but discrete sub-skills (e.g., phonics, phonological awareness, concepts of print, fluency) specific to each language. They are the smaller, interconnected pieces that allow a child’s brain to break the alphabetic code in order to read fluently and make meaning of words on the page. Foundational skills in the teaching of literacy are essential. Unlike oral language, which develops naturally through incidental learning in the home and community, learning to read and write requires explicit instruction in foundational skills (print concepts, phonics, and phonemic awareness). For this reason, school leaders and educators design schoolwide systems to provide students with ample opportunities (especially in early grades) to practice foundational skills in culturally responsive contexts and receive consistent feedback as skills progress is paramount to ensuring that students learn to read.

Although this section is separate from and precedes [Section 6: Writing, Reading Comprehension, Vocabulary, & Background Knowledge](#), it would be inaccurate to imply that grades K–2 are all about foundational skills and grades 3–5 are all about background knowledge, reading comprehension, vocabulary, and writing. The reading models help convey this point of overlap.<sup>107</sup>



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107 B. R. Foorman, personal communication, March, 10, 2023



# Overview of Foundational Skills<sup>108</sup>

Each foundational skill is described below in Table 1, along with commonly associated terms, to promote shared understanding and clarity. Reading and writing skills in English will need to be adjusted for multilingual learners based on the target language of instruction. For example, phonological awareness skills can transfer across languages when students have opportunities to build these skills in their native language and English. Additionally, multilingual learners developing literacy in English instructional programs will need a strong foundation of oral language development in order to reach higher levels of English reading fluency, whereas multilingual learners in dual language programs will already have the oral language skills to develop reading fluency if the literacy instruction is in their home language. [Section 8: Reaching All Learners](#) of this framework adds and further addresses the development of foundational skills for multilingual students.

**Table 1. The Foundational Skills (A cursory look)<sup>109</sup>**

Foundational Skill	Description	Related Skills & Concepts
<b>Print Concepts</b>	<p>Print concepts include understanding the features and organization of printed texts, letter formation, and recognizing distinctive features of letters. These include some discrete skills and others that overlap with phonological awareness and phonics activities over time, such as recognizing that sentences consist of words and spoken words are represented by groups of letters. Print concepts are primarily a kindergarten skill, aside from a focus on the features of a sentence (capitalization, punctuation) in first grade.</p> <p>Print concepts are supported when basic fine motor and perceptual skills are developed (i.e. how to write upper/lower case letters and distinguish between similar letters like b/d/p.)</p>	<ul style="list-style-type: none"> <li>• <b>Return sweep:</b> moving your eyes from the end of one line of text to the start of another line.</li> <li>• <b>One-to-one correspondence of words:</b> matching the printed word to the spoken word.</li> <li>• <b>Letter recognition:</b> visually recognizing the name of a printed letter.</li> </ul>

<sup>108</sup> Derived from [Foorman et al., 2016](#)

<sup>109</sup> Adapted from [Student Achievement Partners, 2020](#)

Foundational Skill	Description	Related Skills & Concepts
<p><b>Phonological Awareness</b></p>	<p><b>Phonological awareness</b> refers to awareness of the segments of sound in words.<sup>110</sup> Phonological awareness is entirely oral and forms the building blocks for later reading before print is even introduced.</p> <p><b>Phonemic awareness</b> is a subgroup of phonological awareness that refers to the specific ability to hear, identify, and manipulate individual sounds (phonemes) in spoken words. Phonemes are the smallest unit of sound within words. Phonemic awareness, including blending sounds into words and segmenting words into sounds, has a direct and significant effect on learning to read and spell. Like phonological awareness, phonemic awareness is entirely oral.</p>	<ul style="list-style-type: none"> <li>• <b>Oral Rhymes and Alliteration:</b> recognizing the beginning and ending sounds of words. (Example: The end of the word “cast” sounds just like “blast”. These words rhyme.)</li> <li>• <b>Words:</b> hearing and counting the number of words when we read or speak. (Example: I hear five words in the sentence “I ran to the cone.”)</li> <li>• <b>Syllables:</b> A syllable is a word or word part that contains a vowel or, in spoken language, a vowel sound (Example: I hear two syllables in the word “kitten.”)</li> <li>• <b>Onset/Rime:</b> the part of a syllable before the vowel (onset) and the vowel and the consonants that follow (rime).</li> <li>• <b>Phonemes:</b> an individual unit of speech in a word that can be heard discreetly. There are 44 phonemes in the English language: 25 consonants and 19 vowels.</li> <li>• <b>Segmenting:</b> breaking, or segmenting a word into its separate sounds (cat= /c/ /a/ /t/)</li> <li>• <b>Blending:</b> combining, or blending the separate sounds in a word to say the word (/c/ /a/ /t/= cat)</li> <li>• <b>Manipulating:</b> adding, deleting, or substituting sounds in a word</li> </ul>

<sup>110</sup> Foorman et al., 2016

Foundational Skill	Description	Related Skills & Concepts
<p><b>Phonics and Word Recognition</b></p>	<p>Phonics consists of learning sound and spelling patterns in a distinct sequence that allows students to identify the relationship between sounds of spoken language and the letters that represent those sounds in print. Phonemic awareness connects directly to phonics, as students must be able to distinguish the sounds in order to recognize them in written form. In phonics instruction, decoding and encoding go hand-in-hand.</p> <p>The goal of phonics instruction is to help children to learn and be able to use the alphabetic principle. The alphabetic principle is the understanding that there are systematic and predictable relationships between written letters and spoken sounds. Phonics instruction helps children learn the relationships between the letters of written language and the sounds of spoken language.</p>	<ul style="list-style-type: none"> <li>• <b>Decoding:</b> Translating a word from print to speech by using knowledge of phoneme-grapheme, or sound-symbol correspondences.</li> <li>• <b>Encoding:</b> Translating speech into print (writing) using knowledge of phoneme-grapheme, or sound-symbol correspondences.</li> <li>• <b>Automaticity:</b> the ability to decode words in print correctly and instantly. As automaticity increases, readers are able to focus more attention on constructing meaning from text rather than decoding.</li> <li>• <b>Word Recognition:</b> Quick identification (recognition) of a previously learned word and its meaning; recognizing words in the moment of reading.</li> <li>• <b>Graphemes:</b> a letter or combination of letters that represent a sound (phoneme) in a syllable or word.</li> <li>• <b>Sound and Spelling Pattern:</b> the phonics-based skill of focus in a scope and sequence, usually a letter, letter pair, or word part.</li> </ul>

Foundational Skill	Description	Related Skills & Concepts
<p><b>Alphabetic Principle</b></p>	<p>Children's reading development is dependent on their understanding of the alphabetic principle – the idea that letters and letter patterns represent the sounds of spoken language. Learning that there are predictable relationships between sounds and letters allows children to apply these relationships to both familiar and unfamiliar words, and to begin to read with fluency.</p> <p>Children whose alphabetic knowledge is well developed can identify and name letters with ease and can begin to learn letter sounds and spelling patterns.</p>	<ul style="list-style-type: none"> <li>• <b>Alphabetic Awareness:</b> Knowledge of letters of the alphabet coupled with the understanding that the alphabet represents the sounds of spoken language and the correspondence of spoken sounds to written language.</li> <li>• <b>Alphabetic Understanding:</b> Understanding that the left-to-right spellings of printed words represent their phonemes from first to last.</li> <li>• <b>Decodable Text:</b> Text in which the majority of words can be identified using their most common sounds.</li> <li>• <b>Regular Word:</b> A word in which all the letters represent their most common sound, in which the alphabetic principle can be applied.</li> <li>• <b>Irregular Word:</b> A word that cannot be decoded and must be identified by sight.</li> </ul>
<p><b>Fluency</b></p>	<p>Reading fluency encompasses accuracy, the speed or rate of reading, and the ability to read materials with expression, and comprehension. Expression, or prosody, includes timing, phrasing, emphasis, and intonation. Fluency is built through word recognition that is automatic and fluid, allowing readers to focus on comprehension of the text. Teaching systematic phonemic awareness and phonics and applying these skills to texts allows students to build automaticity in word reading (and thereby comprehension). To build fluency over time, and to connect reading to meaning, it is important to build from a focus on accuracy for readers. Fluency represents the essential link between reading words quickly and accurately and understanding text.</p>	<ul style="list-style-type: none"> <li>• <b>Accuracy:</b> the ability to read words correctly. Over time, accuracy will lead to developing a bank of “sight words,” or words that are correctly and instantly recognized without applying decoding knowledge.</li> <li>• <b>Rate:</b> the speed at which a person reads. Fluent reading is not speed reading; an appropriate rate reflects an understanding of what is read and varies based on grade-level.</li> <li>• <b>Prosody:</b> reading with appropriate expression. Components of prosody include timing, phrasing, emphasis, and intonation.</li> <li>• <b>Comprehension:</b> the ability to synthesize, or make meaning from text.</li> </ul>

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## Instructional Considerations for Foundational Skills<sup>111</sup>

Foundational skills instruction must be a part of the core curriculum and materials, and be integrated into protected daily literacy instruction, with opportunities to practice and apply these skills up to and beyond grade five as necessary. They cannot only be added as a supplementary component. Providing it only as supplemental content is not only inadequate for most students learning to read, but it can be especially detrimental to students who need additional support learning to break the code of written language.

### Specific Strategies

More specifically, the following strategies help all students develop strong foundational skills, especially students with foundational reading and writing difficulties:<sup>112</sup>

- **Explicit instruction:**<sup>113</sup> Emphasize active participation for students while providing modeling (I do), scaffolding (we do), and prompting (you do) until students can apply a skill independently.
- **Systematic instruction:** Teach skills intentionally and in a carefully planned sequence with each foundational skill presented in a logical and recommended sequence, beginning with simple skills and moving to more complex skills.
- **Precise, simple, and replicable language:** Use precise, simple language and ensure that instructions and explanations are short and clearly stated; use consistent language when modeling a reading skill or conducting a “think aloud.” Think-aloud effectively allows the teacher to demonstrate orally how a skilled reader thinks about a literacy task.
- **Repeated opportunities to practice, build fluency, and review:** Provide opportunities for teacher-supported guided practice of a previously taught skill, as well as opportunities for independent practice in which students work individually or in small groups. Embedded practice across the curriculum increases the maintenance and generalization of newly learned skills. This includes providing a “double dose” of instruction in which a previously taught skill is retaught, using small group or one-on-one instruction, and/or using technology to facilitate reading practice.<sup>114</sup>
- **Adequate time and exposure to decodable text:** When students read and re-read decodable texts, they apply skills practice in real-time and connect their phonics and decoding instruction to reading. Once students are able to apply their decoding skills with fluency, they can transition away from decodable texts to authentic texts that are written to inform, explain, entertain, or elicit a response. Focusing first on decodable texts to build and practice decoding skills provides a pathway for students to grow into texts that are not controlled by phonics.
- **Frequent opportunities to respond and interact:** Engage students by providing opportunities to respond in small groups. Active participation strategies include choral responses, whiteboards, response cards, or partner talk. For students with the most intensive needs, research suggests that groups of two to four students or one-on-one instruction may be the most effective.<sup>115</sup>
- **Specific error correction and high-quality feedback:** Provide students with both positive feedback and error correction.<sup>116</sup> When students make errors, provide specific and precise feedback on the exact part of the incorrect process to ensure they do not continue to practice and solidify errors. Additionally, model the correct response and provide students with opportunities to practice the skill correctly to help cement the new learning.

<sup>111</sup> Derived from [Foorman et al., 2016](#)

<sup>112</sup> [Weingarten et al., 2018](#)

<sup>113</sup> [Special Education Resource Project, n.d.](#)

<sup>114</sup> Gersten et al., 2008

<sup>115</sup> [Vaughn et al., 2012](#)

<sup>116</sup> Hattie & Timperley, 2007

When teaching foundational skills, Table 2 provides a series of important pivots and shifts.

**Table 2. Teaching Foundational Skills**<sup>117</sup>

<b>Instead of This:</b>	<b>Do This:</b>
Loosely tending to the order of foundational skills and allowing for classroom-to-classroom variance...	Follow a clear, intentional scope and sequence based on the learning progression for foundational skills (Figure 8).
Spending a few minutes a day on foundational skills...	Ensure adequate instructional time is spent on teaching foundational skills, including related practice with decodable texts and writing. The amount of foundational skill instruction should be responsive to student needs and strengths.
Focusing only on English...	Make connections between English and a child's home language so that they can leverage existing knowledge and skills. Whenever possible, create opportunities for children to learn to read in their home language.
Patching together an assortment of favorite lessons and randomly sourced supplemental materials...	Select and implement high-quality instructional materials for core instruction that provide guaranteed and viable curriculum across the school and district.

## Learning Progressions

Across the K–5 continuum, literacy instruction must systematically build students' foundational skills alongside the application of meaning-making skills and knowledge. Once students receive instruction in particular skills based on a learning progression, they will progress more quickly when provided with opportunities to apply those skills in the context of connected text and authentic reading and writing.<sup>118</sup> Just as literacy learning progresses in complexity over time, the teaching also responsively advances instruction in complexity to ensure continuity and alignment in the arc of a student's literacy trajectory.

It is also important to note that skills may develop beyond the grade level suggested in the progression, and students may need intensified instruction in skills that need more development.

### THREE KEY RESOURCES TO SUPPORT THE USE OF LEARNING PROGRESSIONS INCLUDE:

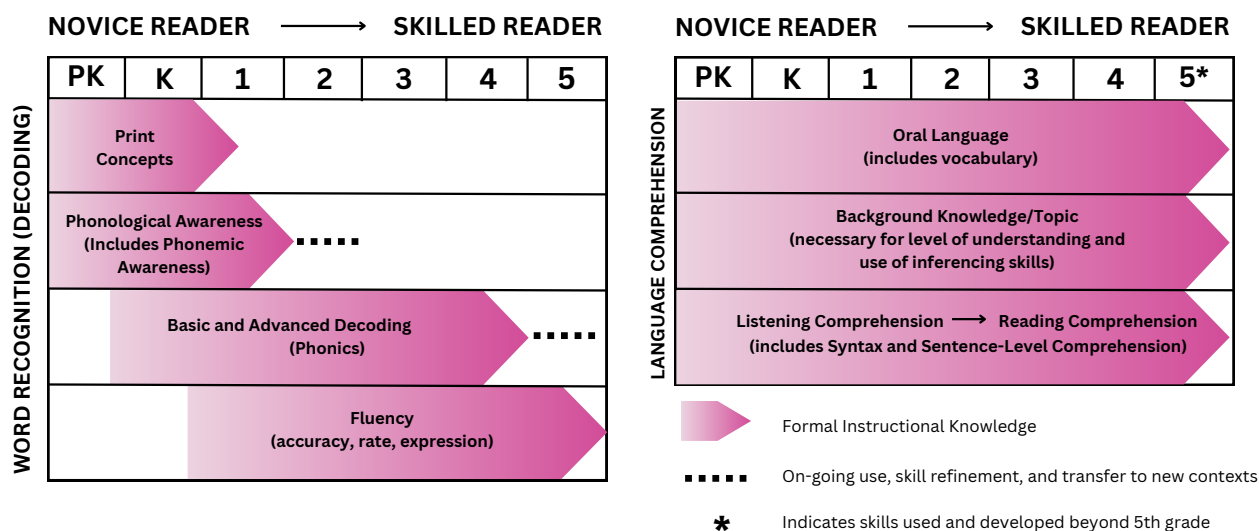
- [Oregon's ELA K-5 Foundational Reading Skills Progression](#) – serves as an instructional support tool for planning purposes to assist foundational reading skills development.
- Achieve the Core's [Foundational Skills Guidance Documents: Grades K-2](#) provide examples and guidance for planning literacy instruction in K-2.
- Head Start's [Planned Language Approach](#) provides resources for education staff and families to support language and literacy development for children ages birth to five in the key skill areas of Alphabet Knowledge and Early Writing; Background Knowledge; Book Knowledge and Print Concepts; Oral Language and Vocabulary; and Phonological Awareness.

<sup>117</sup> [Student Achievement Partners, n.d.-a](#)

<sup>118</sup> Armbruster et al., 2006; Blevins, 2016

Figure 8 outlines a learning progression, informed by reading research, which is designed to develop novice readers into skilled readers spanning pre-kindergarten through 5th grade. The progression of foundational skills (for word recognition/decoding) is presented with the progression for the elements of language comprehension to illustrate how the design of instruction throughout students' development and grade levels work together to support skilled reading over time. Each bar represents an evidence-based estimate for when typical readers master these skills. These learning progressions give educators a guide to the elements of literacy they need to prioritize, including foundational skills, when sequencing their instruction to meet the needs of a broad range of learners.

Figure 8. Foundational Skills Learning Progression<sup>119</sup>



## High-Quality Instructional Materials

Access to high-quality instructional materials is a key lever for supporting literacy teaching and learning, and this is especially true for teaching foundational skills. All approved materials provide explicit and systematic instruction and diagnostic support in concepts of print, letter recognition, phonemic awareness, phonics, word awareness and vocabulary development, syntax, and fluency.

A growing and compelling research base suggests that high-quality instructional materials can yield significant improvements in students' learning<sup>120</sup> especially when paired with high-quality professional learning that supports implementation. Given this, effective curriculum adoptions are also paired with high-quality professional learning for strong implementation.

Oregon's language arts instructional materials adoption criteria for grades K-2 and grades 3-5 include foundational skills. Additionally, to be included on the state-approved list,<sup>121</sup> the adopted core language arts curriculum must also include high-quality texts, text-dependent discussions and writing, building knowledge, text-dependent questions and tasks, supports and scaffolds for all learners, cultural representation, and accessibility. Every curriculum on the State Board-approved adoption list meets this minimum criterion. Any adopted instructional materials should be evaluated for culturally responsiveness and adapted or supplemented to meet the strengths and needs of the classroom community. Reviewing, adopting, and supporting the implementation of high-quality instructional materials is one of the most important jobs of education leaders.

<sup>119</sup> [Student Achievement Partners, 2020a](#)

<sup>120</sup> [ODE, 2022b](#)

<sup>121</sup> [ODE, 2018b](#)

## Explicit and Systematic Instruction

To learn to read, the majority of children require explicit instruction and practice with foundational reading and multiple opportunities with differentiated scaffolding to gain fluency with grade-level texts. Explicit and systematic instruction targeting foundational skills can also help prevent students from experiencing reading difficulties and mistakenly being identified as needing special education.

Structured literacy is an approach to literacy instruction that incorporates the science of reading research and employs explicit, systematic, diagnostic, and responsive teaching of the language and literacy skills needed to be a successful reader.<sup>122</sup> The components and methods of structured literacy instruction are beneficial for all, but critical for students with reading disabilities, including dyslexia.

“Structured literacy describes an approach to reading, writing, speaking, and listening instruction that is explicit, systematic, and intensive. In structured literacy, teachers logically sequence the presentation and integration of language components that contribute to skilled writing and reading comprehension. Instruction directly addresses skills, follows a continuum of skill complexity, and is supported with clear models, step-by-step demonstrations, and ongoing review. Research supports the use of structured literacy to maximize the learning of all students, including English Learners, those with dyslexia, and children with other learning disabilities. If implemented in core (Tier 1) instruction and tiered interventions, structured literacy may prevent or remediate reading difficulties in the vast majority of students at risk for academic concerns.”

ALL Ohio, 2022

Explicit and systematic foundational skills instruction includes:<sup>123</sup>

- Fostering students’ phonemic awareness and knowledge of letter names and sounds in early grades, including:
  - Developing awareness of the segments of sounds (phonemes) in speech and how they link to letters.
  - Teaching students to recognize and manipulate segments of sound in speech (phonemic awareness).
  - Teaching students letter–sound relationships (phonics).
  - Using word–building and other activities to link students’ knowledge of phonemic awareness and its relationship to letter–sound knowledge.
- Teaching students to decode words, analyze word parts, and write and recognize words, including:
  - Looking at letters from left to right within a word, blending corresponding sounds into words using continuous blending. Instructing students in common sound–spelling patterns.
  - Recognizing common word parts.
  - Reading decodable words in isolation and text.

Note: The practice of reading discussed here is not the same in all languages, rather there are languages that are read with different directionality e.g. Arabic, Hebrew, Persian, Urdu, Kashmiri, Pashto, Uighur, Sorani Kurdish, Punjabi, Sindhi, Chinese, Vietnamese, Korean, and Japanese as well as languages that have character based systems e.g. Kanji. It is therefore important that classroom teachers work closely with the English language development teacher in their school or district to ensure that multilingual learners are provided proper language supports to ensure that they are both developing their native language (L1) as well as English.

<sup>122</sup> [International Dyslexia Association, 2020](#)

<sup>123</sup> Foorman, 2023.

# Foundational Skills Development for Multilingual Learners

Multilingual learners’ literacy outcomes, as with all learners’ literacy outcomes, are directly related to the quality of evidence-based instruction they receive. The quality of instruction includes how the teacher responds to the student’s linguistic strengths and needs. Effective foundational literacy instruction builds upon the student’s home language and a diverse linguistic repertoire.

“Effective approaches recognize that early literacy development is occurring in the context of first and second (or subsequent) language development and leverage the dual language development process as children are introduced to the skills and practices of literacy.”

Herrera et al., 2022

When designing and implementing instruction for multilingual learners, the following considerations will help foster success.

## In All Languages: Start with Oral Language

Oral language proficiency and listening comprehension play a significant role throughout all stages of literacy development, increasingly so as students progress through the grades and the English-language demands of reading and writing increase.<sup>124</sup> When students have strong oral language skills and vocabulary in their home language, they are set up to recognize the sounds, words, and structures in another language. Multilingual learners are simultaneously developing their foundational literacy skills alongside their understanding of language. As a result, a stronger emphasis on the meaning of words in the language of instruction ensures they are able to make connections between the meaning of what they are reading and the skill of decoding words and text.<sup>125</sup> Additionally, multilingual learners need frequent opportunities to practice new language skills and concepts to support retention.<sup>126</sup>

## In All Languages: Build Phonological Awareness

Research suggests that the same principles of systematic and explicit phonologically-based support that undergird instruction for English-proficient students also benefit literacy development for students learning English.<sup>127</sup> Phonological awareness can be supported in early childhood classrooms through activities such as listening to and creating rhymes and word and language games. While there may be differences between languages, these activities can be practiced in both the home language and English. These strategic moves are effective ways to support children in focusing on the sounds of language, which prepares them for skills such as decoding words.

Different languages have different sets of phonemes, so it is especially important for multilingual learners to understand the similarities and differences in the two systems. “As children are introduced to the alphabet and exposed to text, the phonological distinctions between the sounds of their two languages become an essential element in preparing for foundational phonics skills and decoding in two languages.”

Herrera et al., 2022

124 Goldenberg et al., 2020

125 Goldenberg et al., 2020; Perfetti & Hart, 2002

126 Baker et al., 2014

127 August & Shanahan, 2010

## In All Languages: Develop Wide Vocabulary

Research is clear that high-quality vocabulary development be an intentional focus throughout a multilingual student’s instructional day.<sup>128</sup> As children are developing language, it is important that they are exposed to books and texts that provide expressive and precise vocabulary in all of their languages. When educators can help students recognize the relationship between vocabulary in the home language and English, students benefit.<sup>129</sup> If the linguistic transfer involves a simple concept or a one-to-one correspondence between the student’s primary language, teachers may be able to help students even when the teacher may know very little of the primary language. But if the concepts are difficult or there is no clear word for the concept in the student’s native language, teachers will need more extensive knowledge of the primary language to be able to help the student.<sup>130</sup>

### KEY TAKEAWAYS

- Foundational skills in the teaching of literacy are essential.
- While oral language begins to develop naturally through incidental learning in the home and community, learning to read and write requires explicit instruction in foundational skills (print concepts, phonics, and phonemic awareness).
- Effective teaching of foundational skills requires explicit, systematic reading instruction and follows an intentional progression that:
  - moves early readers and writers along a continuum in the areas of print concepts, phonological awareness, phonics and word recognition, and fluency, and
  - provides daily opportunities to practice foundational reading and writing skills and to gain fluency with grade-level text (see Figure 8).
- Structured literacy instruction employs explicit, systematic, diagnostic, and responsive teaching of the language and literacy skills needed to be a successful reader and writer. This approach is beneficial for all, and critical for students experiencing reading disabilities, including dyslexia.
- Developing oral language, phonological awareness, and vocabulary across each language is particularly important for multilingual learners.
- Foundational skill areas are addressed in the Oregon English Language Arts and Literacy Standards for students in grades K–5.
- Reviewing, adopting, and supporting the implementation of high-quality instructional materials is one of the most important jobs of education leaders.

### LEARN MORE

- [English Language Arts and Literacy Standards \(from ODE\)](#)
- [Structured literacy instruction](#)
- [Foundational Skills to Support Reading for Understanding in Kindergarten Through 3rd Grade](#)
- [Reading 101: A Guide to Teaching Reading and Writing](#)
- [Evaluating Materials for Culturally Responsive Practices](#)
- [Reading Foundational Skills Key Concepts and Terms](#)
- [Planned Language Approach](#)
- [English Language Arts Curriculum Reviews](#)
- [Developing Foundational Reading Skills in the Early Grades](#)

128 [Baker et al., 2014](#)

129 [Herrera et al., 2022](#)

130 [Baker et al., 2014](#)

# Section 6: Writing, Reading Comprehension, Vocabulary, & Background Knowledge

Foundational skills are essential to breaking the code of written language; without the integration and connection to other literacy skills, however, they are insufficient for deep literacy learning. Despite the common refrain that children are “learning to read” in K-2 and “reading to learn” in 3-5, this framing separates building foundational skills from the application of foundational skills in ways that are misleading. The necessary relationship and sequencing of reading skills is illustrated in Figure 8.

It is true that as students increase their ability to automatically recognize letters, sounds, and words they have more access to understanding and expressing complex ideas and vocabulary. It is also true that the reciprocal relationship between foundational skills, background knowledge, vocabulary, reading comprehension, and writing is vital to a child’s literacy development K-5. The reading models underscore the interdependence of foundational skills alongside writing, vocabulary development, and language.<sup>131</sup> Given this, reading and writing for purpose, engaging with authentic texts, building background knowledge and vocabulary, and writing are all skills that are just as “foundational” to developing literacy skills.

Engaging students in literacy learning means being clear about why reading and writing matter. Creating purpose for literacy includes engaging students in learning about themselves and their world. Equally important is spotlighting actual examples where reading, writing, listening, and speaking have empowered people toward making a positive difference in their communities and the world. When students understand and experience the ways in which literacy correlates to agency and joy, purpose takes root. Part of being an effective reader and writer is understanding the uses and purposes of text as well as the power of text to communicate, convey information, narrate, and entertain. Children become readers and writers because they experience print as useful and books as beneficial or enjoyable.<sup>132</sup>

<sup>131</sup> B. Foorman, personal conversation, March 24, 2023

<sup>132</sup> [Herrera et al., 2022](#)



“[T]he relationship between letters and sounds is necessary and nonnegotiable when learning to read in alphabetic writing systems... Yet reading scientists, teachers and the public know that reading involves more than alphabetic skills.’ Good literacy instruction teaches these skills explicitly while building on what students already know (including their culture and home language); building background knowledge about the world to support reading comprehension; and integrating reading, writing, speaking and listening to provide reinforcement for understanding.”

Darling-Hammond, 2022

## Text-Rich Environment and Connected Text

Students should spend a substantial portion of their day engaged in listening to, reading, thinking, talking, and writing about texts. This means that each student should read connected text (starting with relatively short phrases, then sentences, then multiple related sentences, paragraphs, and longer narratives) every day to support reading accuracy, fluency, and comprehension.<sup>133</sup> The amount of time students spend reading and listening to text is a major contributor to the improvement in students’ vocabulary and comprehension.<sup>134</sup> One of the most efficient ways to learn vocabulary, in addition to receiving explicit vocabulary instruction, is to acquire it while reading. Recent research demonstrates that students learn up to four times as many words when they are reading texts about conceptually coherent topics for a period of time.<sup>135</sup> The selection of texts for classroom instruction will vary depending on the instructional purpose and the student’s reading ability. In general, students should have access to diverse genres and wide-ranging content, including both narrative and informational texts.

“Building knowledge need not—and should not—wait until students possess some level of foundational reading skills.”

ASCD, 2023a

## Building Background Knowledge & Vocabulary

As described in many of the models in [Section 4: Reading Models Based in Research](#), background knowledge and vocabulary play critical roles in students’ reading and writing abilities.

### Background Knowledge

There is a vast body of research that supports the role of background knowledge learned through oral language or print,<sup>136</sup> in students’ ability to make meaning of and comprehend text.<sup>137</sup> Developing knowledge allows students to, for example, choose between multiple meanings of words and make inferences from a text that require background knowledge. Background knowledge is key to understanding various elements of language, such as idioms, especially for emergent multilingual students.<sup>138</sup> Just as high-quality instructional materials are important in developing foundational skills, they are also critical to effectively building background knowledge over time.

133 [Foorman et al., 2016](#); Foorman, 2020

134 Wegenhart, 2015

135 Landauer & Dumais, 1997

136 [ASCD, 2023a](#)

137 [Student Achievement Partners, 2015](#)

138 [Neuman et al., 2014](#)

“[O]nce print has been decoded into words, reading comprehension and listening comprehension requires the active construction of inferences that rely on background knowledge and are implicit in the text.”

Neuman et al., 2014

Designing a school day that includes a broad range of subject areas, such as science and social sciences, is important for a well-rounded education. It also enhances a student’s exposure to vocabulary and content knowledge on a broad range of topics. This leads to an increased ability to understand and build knowledge through creating connections to and between new texts, having a compounding effect on students’ reading comprehension.<sup>139</sup>

## Equity Implications of Knowledge as a Critical Component of Literacy

In many classrooms, instruction and assessments can privilege those with knowledge of certain elements of a dominant culture or pattern of topics.<sup>140</sup> Regardless of cultural or economic background, all students enter classrooms with a wealth of knowledge that is steeped in culture and ways of being. By affirming this and acknowledging that background knowledge is not fixed, educators can extend what students already know through inquiry, careful planning, and purposeful engagement. Because background knowledge plays a pivotal role in reading comprehension, educators need to continually reflect on the question, “Whose knowledge is being privileged, and how do we ensure we are working from the background knowledge of each student and developing shared understandings?”

For multilingual learners, connecting literacy instruction to students’ background knowledge is critical. Multilingual learners often encounter concepts or events in texts that are outside their cultural and life experiences, yet students can grasp many of these concepts by identifying larger themes that correlate with their own lived experiences.

## Strategies for Building Knowledge

It is important that building knowledge does not result in simply having students memorize facts, but rather engaging students in activities that develop “knowledge networks” that are grouped and related in domain-specific ways for current and future learning.

<sup>139</sup> [Willingham, 2006](#)

<sup>140</sup> [Neuman, 2019](#)

Some strategies for building knowledge include the following:<sup>141</sup>

- Teach words in categories, prompting students to generate and identify patterns.
- Teach concepts and related categories through contrasts, comparisons, and analogies.
- Encourage reading and writing not only across a wide range of topics, but also widely within a focused topic, preferably aligned with student interest.
- Leverage multimedia and experiential learning to provide knowledge and word-rich learning experiences for all students.
- When selecting instructional materials, consider how the curriculum is designed to build student knowledge throughout their early grades and beyond.
- Ensure a well-rounded learning experience for students that avoids “curriculum narrowing,” or teaching only a narrow set of subjects.
- Elicit and build on students’ existing background knowledge to make connections and when teaching new topics or concepts.

Additional shifts in instructional practice that build knowledge are described in Table 3 below.

**Table 3. Building Knowledge & Vocabulary<sup>142</sup>**

<b>Instead of This:</b>	<b>Do This:</b>
Selecting texts based on what texts are most familiar and known to the teacher...	Ensure that the texts and topics used reflect the full range of identities in the classroom and community, serving to affirm all students’ lives, languages, perspectives, and histories.
Providing multilingual learners with lower-level or simpler texts and prompts...	Make use of texts and topics where students can use and leverage knowledge from their lives and experiences. This can also be done through the use of paired texts, where knowledge is built in both languages of instruction.
Regularly reading aloud “on-level” student texts with limited opportunities to grow knowledge and vocabulary...	Select books for read-aloud that are far more complex than students can read on their own (1–3 years above what most students can read independently).
Planning read-alouds to teach isolated skills, strategies, or standards (e.g., “This week is author’s purpose week...”)	Keep the text at the center of your planning. Plan standards-aligned questions, tasks, and activities that help students unpack the ideas of the text while drawing on their own funds of knowledge and many skills, strategies, and modes of co-constructing meaning.

<sup>141</sup> [Neuman et al., 2014](#)

<sup>142</sup> [Student Achievement Partners, n.d.-a](#)

# Vocabulary

The richness of children’s oral language serves as an important precursor to their active working vocabulary, generating a repertoire of academic language and translating directly to their ability to actively understand and enjoy what they read. Most vocabulary growth occurs when children encounter new words in texts or talk and activate their schema to infer the meaning of the word. The more expansive a child’s vocabulary is in early grades, the easier it is for them to decode text, read with fluency, and comprehend at grade level. “Word and world knowledge are reciprocal and mutually reinforcing” and support reading comprehension.<sup>143</sup>

Morphology refers to “the knowledge of meaningful word parts in a language (typically the knowledge of prefixes, suffixes, and/or roots and base words).” Knowledge of word structure and how words are formed is linked to both greater vocabulary development and stronger reading comprehension. Research has shown that in children as young as first grade, knowledge of word parts has influenced their literacy development .

Massachusetts Department of Elementary and Secondary Education, 2023

Vocabulary and morphology knowledge are supported by explicit teaching in word meaning, word parts, and spelling. Current vocabulary research confirms the benefits of explicit teaching over implicit teaching in promoting vocabulary development.<sup>144</sup> Research also demonstrates that “teachers need to show the spellings of new vocabulary words when they discuss their meanings. Similarly, students need to stop and pronounce unfamiliar words rather than skip them during independent reading.”<sup>145</sup>

Intentional and ambitious efforts to build vocabulary include the following strategies:<sup>146</sup>

- Select grade-level academic vocabulary words to teach from read-alouds of literature and informational texts and content area curricula.
- Introduce word meanings to children during reading and content area instruction using child-friendly explanations and provide opportunities for children to pronounce the new words and to see the spelling of the new words.
- Provide repeated opportunities for children to review and use new vocabulary over time, including discussing ways that new vocabulary words relate to one another and children’s existing knowledge, addressing multiple meanings or nuanced meanings of a word across different contexts, and encouraging children to use new words in meaningful contexts (e.g., discussion of texts, discussions of content area learning, semantic maps).
- Encourage talk among children, particularly during content area learning and during discussions in response to a text or new learning.
- Teach morphology (i.e., the meaning of word parts).

“Instructional implications are that teachers should include written words as part of vocabulary instruction and that students should pronounce spellings as well as determine meanings when they encounter new vocabulary words... Students who see the spellings of words actually learn the meanings of the words more easily — orthographic knowledge benefits vocabulary learning.”

Rosenthal & Ehri, 2008

143 [ASCD, 2023b](#)

144 [Butler et al., 2010](#)

145 Ehri & Rosenthal, 2007

146 [Michigan Association of Intermediate School Administrators General Education Leadership Network Early Literacy Task Force, 2016](#)

# Reading Comprehension

Reading comprehension describes the process of constructing meaning through interaction with a text to understand what an author has stated, explicitly or implicitly. This interaction and meaning-making also draws on what the reader brings to the text, including their background knowledge, abilities, and experiences.<sup>147</sup> The comprehension of written language (i.e., reading comprehension) requires that the components of language and components of the alphabetic principle be activated along with background knowledge, executive function, and motivation.<sup>148</sup> Comprehension and knowledge building should work synergistically with foundational skills learning (see Figure 8). The following strategies come from the Institute of Educational Science practice guides.<sup>149</sup>

**Teach students how to use reading comprehension strategies.** Examples of effective reading comprehension strategies include activating prior knowledge, questioning, visualizing, monitoring, clarifying, drawing inferences, and summarizing. When teaching comprehension strategies, do not overfocus on or teach the strategy in isolation; stay text-focused and ensure that the purpose of strategy instruction is for a deeper understanding of a complex text. When engaging in a text together, the teacher can model and explain when, how, and why to implement a particular strategy to help with understanding, and then they can guide students through practice until students learn to use the strategies themselves.<sup>150</sup>

**Teach students to identify and use the text’s organizational structure to comprehend, learn, and remember content.** Reading research indicates that being able to identify and use text structures can be an important skill in comprehending text. For example, the RAND Reading Study Group<sup>151</sup> concluded that text structure is an important factor in fostering comprehension. Students who are aware of text structure organize the text as they read, and they recognize and retain the important information the text reveals.

Simply put, text structure refers to the characteristics of written material and the way that ideas are constructed and organized. In other words, text structure is the arrangement of ideas and relationships among the ideas. Text structure organization exists in both narrative and expository structures. Oregon’s K-12 English Language Arts and Literacy Standards call for equal attention to fiction and nonfiction text; therefore, it is critical that students learn to recognize and use strategies for both types of texts. Many students start school with an awareness of narrative text structures, but fewer students have an awareness of expository text structure. This is due, in part, to the fact that most of the reading that parents and early childhood teachers do with their preschool children is from storybooks.

Most students enter school with a basic understanding of narrative structure, although some students with less exposure to storybooks may need to be taught this structure directly. Narrative text follows a singular general structural pattern, often referred to as story grammar. This often includes the elements of setting and main character, an initiating event and reaction, solution attempts, the outcome of these attempts, and the ending reaction.

147 [Shanahan et al., 2010](#)

148 Foorman, 2023

149 [Foorman et al., 2016](#); [Graham et al., 2012](#)

150 [Shanahan, 2018](#)

151 [Snow, 2002, p. 40](#)

When teaching expository text structure, many researchers reference five primary text structures, including<sup>152</sup>:

- **Collection:** The author lists items or events in some manner. A listing becomes more organized when it is sequenced by time of occurrence.
- **Description:** The author provides information about a certain topic, e.g., attributes, characteristics, etc.
- **Causation (Cause/Effect):** The author delineates one or more causes and then describes the ensuing effects.
- **Problem/Solution:** The author poses some type of problem or question and then generates the answer.
- **Compare/Contrast:** The author compares and contrasts two or more similar events, topics or objects.

Although this classification system makes distinctions between these five different types of text structures, in reality, most texts include a mixture of these structures. The rationale behind teaching text structure is that by teaching students to recognize common patterns within different types of structures, they will be better able to identify the macrostructure formation or gist of the text including main ideas and how these ideas fit together which, in the end, will result in improved comprehension.

**Guide students through focused, high-quality discussions on the meaning of text.** Research shows that teachers should give students ample opportunities to respond to higher-order questions that require them to reflect on the text and engage in discussions with peers.<sup>153</sup> Reading comprehension improves when teachers ask students follow-up questions and encourage students to refer back to the text. Authentic classroom discussion allows students to share and expand their thinking and use language in new ways. Specifically, discussions about texts provide opportunities for students to collaboratively build knowledge that supports their literacy development and strengthens their reading and writing skills. Multilingual students especially benefit when they are able to have these discussions in multiple languages. Students' overall reading development is supported when they have opportunities to respond to texts both verbally and in writing.<sup>154</sup>

**Select complex and diverse texts purposefully to support comprehension development.** Reading comprehension should be taught using multiple genres of texts that reflect and positively affirm the lives, languages, perspectives, and histories of the students in the classroom and all members of society. All students should have ample opportunities to read and/or listen to complex texts that provide an appropriate level of rigor, align with grade-level standards, and support the purpose of instruction. For instance, the complex texts selected should represent a range of narrative and informational genres to support students' development of knowledge and vocabulary.<sup>155</sup> Providing students access to complex texts through independent and shared reading experiences generates opportunities to stretch their literacy skills while simultaneously building their world knowledge and vocabulary. Research also recommends utilizing complex texts that integrate other disciplines to support the balance of skills-based and knowledge-based competencies in early literacy instruction.<sup>156</sup>

Establish an engaging and motivating context to teach reading comprehension. Motivation and engagement play an important role in reading comprehension. The following teaching practices can support student motivation: making literacy experiences more relevant to students' interests, everyday lives, or important current events; providing a positive learning environment that promotes student choice and autonomy in learning; acknowledging and affirming student success (self-efficacy); encouraging collaboration with peers; and planning thematic units that draw connections between content areas. Teachers spark students' interests by choosing texts with themes that are relevant and engaging.

152 Meyer & Freedle, 1984

153 [Murphy et al., 2009](#)

154 [Graham & Hebert, 2011](#); Wegenhart, 2015

155 Wegenhart, 2015

156 [Shanahan et al., 2010](#)

# Writing

Good writers are good readers. Writing gives voice to children’s inner thoughts, lived experience, and creative imagination and allows a way for them to be expressed and shared with the world. As a form of communication, writing can transcend time and is a way to pass stories from generation to generation. Writing is an essential component of children’s learning, not only for the value it has for literacy development, but for the value it has as a medium for expression, discovery, and creativity. Writing nourishes the human spirit.

“Children want to write. They want to write the first day they attend school. This is no accident. Before they went to school, they marked up walls, pavements, newspapers with crayons, chalk, pens or pencils...anything that makes a mark. The child’s marks say, ‘I am.’”

Graves, 1983

Writing focuses students on phonics, comprehension, mechanics, developing voice or perspective, word choice, and communicating a perspective to others. Through writing, they learn more about the alphabetic principle and they also discover their writer’s voice and learn to articulate their ideas, their opinions, and their feelings. Writing accelerates language and reading skills, and serves as a catalyst for students to solidify foundational skills and as a creative outlet for them to emulate story and text structure. Schools can deepen literacy learning by providing high-quality, standards-aligned<sup>157</sup> explicit instruction in writing throughout the school day, both integrated into content learning through disciplinary literacy practices and as its own discrete instructional time.

## Writing and Reading as Reciprocal, Complementary Processes

Writing and reading are reciprocal practices that mutually reinforce a student’s literacy learning.<sup>158</sup> Reading pulls words and ideas off a page to give them meaning; writing moves ideas, arguments, and dreams from the writer’s heart and mind onto the page, to be shared with others. Reading is a receptive domain of literacy, while writing is the expressive or productive domain of literacy. Because reading and writing in English both require knowledge and familiarity with the alphabetic orthography of the language, it is not surprising that these two fundamental literacy skills are closely related. Table 4 includes examples of the similarity in how students process various information when writing and reading.

**Table 4. Common Ground Between Writing and Reading**

Strategic Processing	Writer	Reader
Searching for meaning	Generates ideas with an audience in mind	Uses print to construct meaning
Monitoring for meaning	Checks that the message makes sense	Checks that the message makes sense
Searching for structure	Anticipates the order of words based on how book language and oral language sound	Groups words together in phrases to represent the intended message

<sup>157</sup> ODE, 2019

<sup>158</sup> Sedita, 2019

Strategic Processing	Writer	Reader
Monitoring for structure	Checks the order of words supporting the intended message	Re-reads (out loud or holding the message in the mind) to check that the word order communicates the intended message
Searching for graphophonic information	Uses knowledge of how letters, words, and print work to record the message	Seeks out graphophonic input from print in relation to meaning and structure
Monitoring for graphophonic information	Checks and detects any discrepancies between anticipated message and graphophonic input	Checks and detects that the print represents the message
Self-correcting	Detects and corrects	Detects and corrects

Explicit instruction in writing is needed in addition to explicit instruction in reading, because although these language tasks may rely on similar processes, they are nonetheless independent skills that require students to apply their knowledge of the grapho-phonemic code, spelling, and other elements of reading.

The connection between reading and writing is also evident in the Oregon English Language Arts and Literacy Standards<sup>159</sup> for students in grades K–5.

## Writing Skills

Writing skills can also be thought of in two interrelated groups, transcription and translation.<sup>160</sup>

**Transcription (handwriting, spelling, conventions, keyboarding):** Transcription is the process of transferring one’s thoughts and ideas into words and putting those words on paper or typing them on a keyboard. Transcription skills include letter formation, handwriting and keyboarding fluency, spelling, and conventions, including punctuation and capitalization. These skills are the technical foundation of written composition. Students need explicit instruction in these skills and time to process them and develop and apply the skills for meaning. Spelling in English relies on attaching sounds to letters, breaking words into syllables, and attending to the parts of words that have meaning, such as roots, prefixes, and suffixes. Automaticity of transcription can accelerate written expression and increase both the length and quality of written work. Students who struggle with transcription skills may have difficulty expressing their ideas in writing.

**Translation (grammar, sentence structure, writing process, text structure):** Translation involves generating and organizing ideas into written words, phrases, sentences, and paragraphs. It focuses more on the process of writing, which includes planning, drafting, revising, and editing. Translating can be taxing for beginning writers, so direct instruction and time to practice are important for writing success. Students who have not mastered transcription skills might require greater teacher support throughout the planning process. Supports can include providing writing prompts, modeling translation behaviors, and providing sentence stems and paragraph frames along with graphic organizers. For students to achieve full mastery of writing, educators provide instruction across various genres (narrative, informative/explanatory, and opinion), with an explicit focus on the different text structures and sentence composition qualities of each genre.

<sup>159</sup> [ODE, 2019](#)

<sup>160</sup> [Michigan Department of Education, 2021](#)

## Spelling

As with all literacy skill-building, each student has their own unique needs. Spelling reinforces other literacy learning. Learning the rules of spelling can help students understand phonics, orthography, morphology, and vocabulary.<sup>161</sup> Many of the same rules apply to reading as to spelling.<sup>162</sup> While English may seem to be less patterned than some languages, most word spelling can be accounted for by meaning, language of origin, part of speech, and sound-spelling combinations.<sup>163</sup> Students benefit from explicit instruction in the rules of spelling, so that they need not rely on memorization alone to be successful spellers. While most basal instructional materials include spelling words, these words will not necessarily meet the needs of all students. Rather, it is recommended that teachers find differentiated materials in order to engage in developmentally appropriate spelling instruction.<sup>164</sup>

Some research-based recommendations for teaching spelling include:<sup>165</sup>

- Establishing weekly routines for spelling instruction.
- Giving students ample opportunities to practice words and providing immediate feedback.
- Creating explicit connections between word knowledge and content learning.
- Providing students opportunities to generalize their spelling skills to writing.

## Instructional Design for Teaching Writing

Four evidence-based recommendations for writing instruction follow:<sup>166</sup>

- **Provide time daily for students to write, including time for explicit instruction in writing skills.** This writing instruction should be appropriate to the students' grade level and can be embedded within other content areas of instruction through disciplinary literacy practices, such as science report writing, historical fiction as part of social science, or describing the process used to solve a math problem. School leaders and classroom teachers must ensure that sufficient time is dedicated each day for both writing instruction and student writing practice, with writing occurring across the curriculum. Instructional time at the elementary level should focus on increasing fluency in foundational skills including spelling and handwriting. However, instruction should not focus exclusively on the mechanics of writing; rather, it should also teach higher-level writing skills such as strategies for planning, writing, and revising text as well as other grade-specific standards.
- **Teach students to use the writing process for a variety of purposes** and to understand that planning and specific strategies help writing meet its goals.
  - **Writing strategies.** Although an informal instructional approach may be all the support some students need, many other students need explicit and scaffolded instruction from the teacher in order to become proficient writers. Teachers can develop a plan for the explicit instruction of writing strategies across the grades and within grades in order to address students' immediate growth opportunities. Strategy-based instruction has been shown to have a substantial effect on the quality of students' writing. Writing strategies can range from strategies for brainstorming and revising to strategies designed to develop writing-specific genres such as personal narratives, persuasive essays, or research reports. The ultimate goal of strategy development is for students to achieve automaticity in using these strategies independently. These strategies will, in essence, become the "invisible knowledge" that students carry in their heads while engaging in writing tasks.

161 [Institute for Multi-Sensory Education \(IMSE\) Journal, 2020](#)

162 [Moats, n.d.](#)

163 [Moats, n.d.](#)

164 Schlagal, 2007

165 Troia & Graham, 2003

166 [Graham et al., 2012](#)

- **Diverse genres of writing.** Introduce students to multiple genres of writing beginning in the early elementary grades alongside a discussion about the different purposes those genres can accomplish. The practice of reading a variety of books to young children has been shown to support their beginning acquisition of genre knowledge, and, as genre knowledge grows, so do children’s abilities to apply that knowledge to their own writing.<sup>167</sup>
- **Teach students to become fluent with handwriting, spelling, sentence construction, and typing.** Effortless proficiency in basic writing skills allows students to focus on organizing their thoughts and exploring deeper meaning making; elementary school is the time when students develop these essential skills. Many students who struggle with handwriting may also struggle with automatic keyboarding. Teachers should therefore provide explicit instruction in both handwriting and keyboarding.
- **Create an engaged community of writers.** Students who see themselves as writers feel greater motivation to apply the skills and internalize the writing process. Student learning is helped by sharing their written work with an authentic audience, seeing their words in print, collaborating on writing projects, and learning to give and receive feedback about writing.

#### KEY TAKEAWAYS

- Foundational skills are essential to breaking the code of reading; however, they are insufficient for deep literacy learning without the integration and connection to other literacy skills.
- As students master foundational skills, instructional time shifts toward the development of other literacy skills as students begin to use texts to learn content.
- Building background knowledge should be enacted in culturally responsive ways by asking questions like, “Whose knowledge is being privileged?” then ensuring multiple perspectives are included.
- Building vocabulary ensures students are able to make meaning of the words and comprehend the text they are reading.
- Building and expanding students’ background knowledge allows them to comprehend the words they are reading as they develop foundational skills.
- Writing practice helps students solidify and make sense of foundational skills, allows them a creative outlet to emulate story and text structure, and creates opportunities to connect in meaningful ways with the world around them.
- Reading comprehension and writing instruction permeates all grades.

#### LEARN MORE

- [Core \(TIER 1\) Instructional Strategies to Improve K-4 Reading Comprehension](#)
- [Early Literacy Development](#)
- [Self-Regulated Strategy Development](#)
- [Looking to Research for Literacy Success](#)
- [Promoting Preschool Writing](#)
- [Teaching Elementary School Students to Be Effective Writers](#)
- [Comprehension Research and Resources](#)
- [Importance of Writing Instruction](#)

<sup>167</sup> Donovan & Smolkin, 2006

# Section 7: Core Instruction & Assessment

Core instruction is the highest-leverage investment for improving early literacy. Whether a teacher is using whole group instruction, differentiated small group instruction, guided instruction, or providing independent practice, the core literacy block provides critical access to standards-aligned learning experiences. Additionally, the use of high-quality instructional materials provides a common foundation for schools to align their curriculum to standards and collaborate on any needed adjustments or supplementary materials. When schools design professional learning systems that provide educators with opportunities to reflect on lesson design and examine instructional practices, literacy instruction is strengthened, and students benefit.<sup>168</sup> Consistent access to core instruction, which includes exposure to grade-level text, tasks, and talk, is a key equity lever for children learning to read and write.

## Supporting Students in Accessing Core Instruction

All students should receive core instruction that is differentiated to address individual needs. While some students will have their needs met through core instruction alone, others may need the additional support provided through supplemental, targeted, skill-based small group instruction in addition to the core (core + more).

In order to reach and respond to the learning needs of each student, educators need to know what those needs are. It is through assessment that educators gain this knowledge and are therefore able to tailor the instructional experience. When instruction matches where students are in their learning and is provided in an inclusive, culturally and linguistically responsive, and identity-affirming context, it creates an optimal learning environment. Additional support and interventions may be needed to build upon core instruction to support individual student needs.



<sup>168</sup> [Gates Foundation, 2017](#)

## Core + More

Equitable access to core instruction necessitates that all educators understand the elements of instructional design. Educators need to know and understand how reading develops, how to align instruction to grade-level standards, how to identify where each student is on the learning progression, and how to effectively use differentiated practices and tiered instructional supports to move students forward in their literacy learning.

It is important to ensure coherence in high-quality instructional materials, strategies, language of instruction, and routines across the support continuum to avoid “curricular chaos” and to create a connected literacy learning experience for students. Instruction at all levels should be explicit and systematic, provided by highly-qualified educators, and focused on leveraging students' strengths while addressing their needs.

### IS CORE+MORE REALLY TALKING ABOUT MULTI-TIERED SYSTEM OF SUPPORT (MTSS)?

The phrase Core+More captures the central purpose of MTSS as an organizing framework designed to responsively meet the strengths and needs of all students. It highlights the importance of every student receiving strong core instruction while also providing specific, targeted skill instruction as needed. Core+More describes the data-informed intensification of instruction that happens within a multi-tiered system of support.

“MTSS is a framework for how school districts can build the necessary systems to ensure that each and every student receives a high quality educational experience. It is designed to support schools with proactively identifying and addressing the strengths and needs of all students by optimizing data-driven decision-making, progress monitoring, and the use of evidence-based supports and strategies with increasing intensity to sustain student growth.”<sup>169</sup>

Starting planning from the vantage point of how individuals learn makes instruction more effective for all. Application of the Universal Design for Learning Guidelines<sup>170</sup> is especially helpful in this, as they prompt educators to consider engagement, representation, action, and expression when designing instruction. High-quality core literacy instruction for all students can be supplemented and extended to support individual needs through differentiation and small-group instruction.

When core instruction and targeted, strategic support is insufficient to meet a student’s individual needs, then more intensified and individualized support (core + more + more), based on progress and patterns of response, is needed. All instructional support for students with reading and writing difficulties should be provided in addition to high-quality core literacy instruction. An effective tiered instructional support plan will ensure that the right instruction is delivered with the right level of intensity and duration to the right students at the right time.

The National Center on Intensive Intervention [Tools Chart](#) provides information about published intervention programs that can aid in a district’s design of a continuum of academic supports. The Florida Center on Reading Research’s Student Center Activities<sup>171</sup> are sets of discrete low-resource activities that students can complete independently or in small groups, organized along the progression of foundational reading skills. These activities may be used to supplement core instruction in areas where student differentiation needs are not matching offerings within the district’s curriculum.

169 [DESE, 2020](#)

170 [CAST, 2018](#)

171 [Florida Center for Reading Research \(FCRR\), 2021](#)

# Assessment as an Accelerant for Learning and Prevention

The term “assessment” comes from the Latin term *assidere*, which means to “sit beside.” It draws a picture of a child and teacher, connected through a relationship and focused on helping the child identify their strengths and their next learning steps. When assessing students, educators have the opportunity to uplift a child’s sense of self and agency as a learner by highlighting what they can do well and what they are ready to learn next. The relationships between educator and student are nurtured through honoring the knowledge students bring from their own lived experiences and cultures, their home language, and interests. Assessment in its purest form serves to accelerate student learning, contribute to student efficacy and engagement, identify areas for further support, and deepen the relationship between teacher and learner.

**Assessment Guiding Principles:**<sup>172</sup> These overarching principles situate assessment practice within a larger set of values to ensure maximum access and learning opportunity for children.

- Assessments should be used to determine how to bring students into grade-level instruction, not whether to bring them into it.
- The formative assessment process is the strongest tool to support and accelerate learning and growth.
- Targeted checks using curriculum-based assessments will support instruction; use of diagnostic assessments and/or formative practices are essential.
- All assessments should be given within a larger context that supports students’ social, physical, and emotional wellbeing, honors relationships, and uses culturally responsive practices.

Both general education teachers and specialists use assessment data to learn about student needs and offer increasing levels of support through differentiated core instruction within the general education setting. Progress monitoring data gathered through curriculum-based measures and other formative and interim assessment tools help general education teachers and specialists plan and adjust instruction.

## ASSESSMENT AND MULTILINGUAL LEARNERS

Multilingual learners need effective and appropriate assessment and instruction. Lacking this, they risk becoming long-term English learners who suffer diminished opportunities to learn and fall so far behind their English-speaking peers that it is difficult for them to catch up and graduate high school. Literacy assessments that are designed for bilingual learners and responsive to their native language are desperately needed to promote effective literacy instruction for dual language learners and English learners to avoid the over or under-identification of multilingual learners for special education.

Adapted from Escamilla et al., 2022

Formal tests are designed for a specific purpose. It is important to consider the responsible uses described in Table 5; when used in other ways, these test results—especially the foundational skills screeners—could lead to inappropriate groupings that remove learning opportunities. Additionally, all tests include error, and no score should be deemed objectively true. When multiple methods are used for their intended purpose, the data can help educators understand where students are in the learning process overall and can identify the next instructional moves.

<sup>172</sup> Adapted from [Michigan Department of Education, n.d.](#)

## Formative Assessment Practices

Formative assessment information is immediately useful for instructional decision-making and provides important depth when interpreting test data. The cloth of effective early literacy instruction is woven with the threads of the formative assessment process.<sup>173</sup> Formative assessment is a planned process to elicit evidence of student learning in order to improve student understanding of the intended learning outcomes. Formative assessment is a process of collecting and responding. The information gained about student learning is used in the course of instruction to respond to and adjust instruction. In addition, formative assessment practices support students to become more self-directed learners.<sup>174</sup>

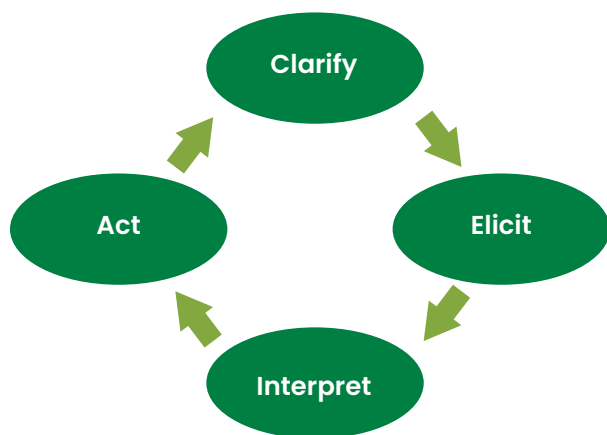
### Formative assessment answers the questions:

- “Where are we going as students and teachers?”
- “Where are we now?”
- “How do we get to the learning target?”

### The fundamental principles of the definition provided above is that formative assessment:

- is a planned, ongoing process
- occurs during teaching and learning
- intended to elicit and use evidence of student learning
- focused on disciplinary learning
- supports students becoming more self-directed learners

Figure 9. Formative Assessment Process



This planned, ongoing formative assessment process starts with **clarifying** learning expectations, then **eliciting** evidence of learning and **interpreting** that evidence in order to understand the status of the student’s learning. Based on this information, the educator and student can then make an informed decision about the next learning experience for the student (**act**). In early literacy instruction, this may look like showing a student how to shape their tongue to make a “t” sound and pressing the tongue against the front teeth, asking the student to show the teacher what that looks like, then asking the student to make the “t” sound and discussing how close to success they got.

Examples of formative assessment in practice:

- Journals or learning logs to show growth over time in a portfolio
- Academic conversations to explain new learning
- Graphic organizers to structure note-taking
- Student-teacher conference or small group discussions to recount learning

<sup>173</sup> [Smarter Balanced, 2022](#)

<sup>174</sup> [Formative Assessment for Students and Teachers \(FAST\) State Collaborative on Assessment and Student Standards \(SCASS\), 2018](#)

- Exit slips to show “I think..”, “I wonder...”, “I still want to know...”
- Fill-in-the-blank or “cloze” activity using sentence frames
- Reciprocal teaching
- Recording student language through technology
- Drawing or role playing
- Gallery walk of student work where students give each other feedback on stickies
- Word or concept sorts based on unit themes or student-created categories
- One word or one phrase response using whiteboards
- Self-checklist or peer-checklist
- Label or sequence visuals like pictures, photos or realia (real life objects)
- Student-generated questions for peers

Formative assessment practices rely on multiple feedback loops, including conversations between learners and their teachers. Providing and accepting feedback is most effective when conducted with an asset-based approach, as students who are on the edge of their learning need to know that they are capable of reaching the next level in their learning progression. When providing effective corrective feedback, educators communicate that they are holding the learner to high standards because they believe the student is capable and can meet those standards. They also provide the student with specific actionable steps to work on. This type of asset-based and actionable feedback is an effective strategy for all student learning, and especially important for students who have been historically underserved.<sup>175</sup>

#### ASSET-BASED FEEDBACK PROTOCOL <sup>176</sup>

1. Begin with rapport building check-in. Take time to connect.
2. State explicitly the purpose of your meeting and affirming your belief in the student’s capacity as a learner. Provide evidence by citing progress and growth in other areas.
3. Validate the student’s ability to master the learning target while acknowledging high demands of the task. Analyze the task together, identifying the easy and hard parts.
4. Deliver feedback that is specific, actionable, and timely. Restate what the final goal is and what mastery looks like and then show them where they are in relation to the goal.
5. Create space for them to react to what they heard and how they feel about it.
6. Provide specific actions to take to improve, and ways to track their progress.
7. Ask the student to paraphrase what they heard you say- what is wrong, what needs to be fixed, and how to go about fixing it.
8. Offer emotional encouragement and restate your belief in them. Do not skip this part.
9. Set up a time to follow-up and check progress.

The [Formative Assessment Rubrics, Reflection, and Observation Tools to Support Professional Reflection on Practice](#) is a peer assessment resource that educators can use to support one another in developing robust early literacy formative assessment practices in the classroom.

<sup>175</sup> [Cohen et al., 1999](#)

<sup>176</sup> Adapted from Hammond, 2014

## Early Literacy Tests

Some tests are helpful for seeing how learning is progressing and finding out where to get curious about specific student needs. For example, this could include recording student oral reading skills and noting errors in a reading passage then tracking progress over several weeks. State and district summative tests, by contrast, show how well systems are meeting the needs of groups of students and can be used to identify patterns that speak to inequities and places where additional evidence and inquiry is needed. Norm-referenced tests compare a student to others; criterion-referenced tests compare a student to domain proficiency; and, individual, or ipsative assessment compares a student to their previous performance. Table 5 provides information about these different kinds of tests and purposes.

The [Evidence-based Assessments in the Science of Reading Cheat Sheet](#) speaks to the how, why, what, and when of early literacy assessments, as well as providing an analogy and example of each. In many ways, this “cheat sheet” effectively summarizes Table 5.

**Table 5. Applied Purposes and Uses of Common Early Literacy Tests**

Applied Purpose	Descriptions and Responsible Use
<b>Universal Screening</b>	<p><b>Description:</b> Help determine where to be curious and find out more about where student learning needs acceleration through diagnostic evaluation processes. Relatively fast and efficient to administer. These screenings may occur early in the year, mid-year, and at the end of year.</p> <p><b>Responsible Use:</b> Most impactful when teachers observe or conduct the screening process and document specific areas of strength and identify those early literacy skills that need more attention by watching what students are able to do and where their learning edges are during testing. Universal screeners do not encompass the full breadth of English Language Arts standards; therefore, they should not be used as the <i>only</i> tool for placing students into reading-level groups or for determining program eligibility.</p>
<b>Diagnostic</b>	<p><b>Description:</b> Informal or formal. Designed to assess specific skills or components of reading, such as phonemic awareness, phonics, fluency, comprehension, and vocabulary, that individual students may need more support with. Results inform core instruction and possible opportunities for support.</p> <p><b>Responsible Use:</b> Identify specific skill areas that a student needs to master in order to expand further learning opportunities. <i>Used sparingly and intentionally. Few students need this kind of in-depth reading test, so use should be rare.</i></p>
<b>Progress Monitoring</b>	<p><b>Description:</b> Short, targeted assessment approaches that are aligned to a specific skill and can be given at regular intervals to track student change over time.</p> <p><b>Responsible Use:</b> Reviewing a student’s progress toward acquiring specific, discrete skills taught. Best when used efficiently and in combination with other sources of information to help guide instruction.</p>

Applied Purpose	Descriptions and Responsible Use
Interim	<p><b>Description:</b> Periodically administered tests that target specific chunks of content, typically a unit or related set of units. This includes approaches that some educators call “classroom summative” tests, which come at the end of a unit or term, as they are within-school-year practices. What educators in Oregon often refer to as “Common Formative Assessments” are actually interim tests (formative assessment is a process, not a test).</p> <p><b>Responsible Use:</b> The most effective tests can be used by students and educators alike, and are best used as tools to determine how well students responded to the instruction they just experienced. Interim tests are best used as tools in the hands of teachers, informing how well students are learning what is being taught periodically throughout the year.</p>
State Summative	<p><b>Description:</b> Oregon’s summative English language arts test blueprints include multiple standards: reading (40% of items), writing (40% of items), research (10%), and listening (10% of items). The test scores are thus indicative not just of reading, but of literacy. Oregon’s state English language arts summative tests are criterion-referenced tests that do not assess foundational skills in literacy; they generally focus on comprehension and writing of grade-level text. State summative tests are designed to sample all grade-level standards in their full depth, breadth, and complexity within a specific content area or domain, providing evidence of how well curriculum and instruction have been designed to meet the reading, writing, research, and listening learning needs of all student groups annually as part of program evaluation.</p> <p><b>Responsible Uses:</b> Program evaluation, longitudinal review of trends for student groups, identification of where to invest resources. State summative test results should not be used to set goals for teacher evaluation or to make high-stakes student decisions (e.g., course placement, Talented and Gifted identification, etc.).</p>

## Coherent, Comprehensive, & Continuous Assessment Systems

Strong assessment systems tend to the 3Cs of effective assessment: coherent, comprehensive, and continuous.<sup>177</sup>

- **Coherent:** All aspects of early literacy assessment and instruction align with Oregon’s language arts standards. The assessment system provides clear information about learning, so educator instructional practices align with what students need to learn next.
- **Comprehensive:** The approach taken to early literacy assessment provides multiple types of tests (universal screening, diagnostics, progress monitoring, interim tests, and summative tests) and is rooted in robust formative assessment practices. Informed decisions can be made in the moment, periodically throughout the year, and annually to drive improvement of literacy curriculum and instruction.
- **Continuous:** Early literacy assessment allows for assessment practices that drive the collection and review of the evidence of reading and writing learning that connects to prior learning and identifies the next steps across the school year.

<sup>177</sup> [Marion et al., 2019](#)

When the 3Cs are in place, the basic conditions are established for educators to use data and evidence from multiple sources to improve practice and make informed decisions about student learning. When clear alignment to the full depth, breadth, and complexity of standards is present across assessment practices, coherent responses to test data are feasible.

Leadership helps to create the conditions for classroom educators to be successful and reflective about their literacy instruction by 1) providing data review protocols and protocols for observing practice and reflecting and 2) creating time for grade-level data teams to meet and discuss both data and practice. In addition, another important condition is creating a data culture where unequal test results are seen as evidence of unequal learning experiences. In such a context, data sparks a determination to identify ways to improve the systems meant to serve students.<sup>178</sup>

### KEY TAKEAWAYS

- Guaranteed access to quality core instruction matters; consistent, uninterrupted access to core instruction, inclusive of exposure to grade-level text, tasks, and talk is a core equity issue for children learning to read and write.
- It is important to ensure coherence in high-quality instructional materials, strategies, language of instruction, and routines across the support continuum to create a connected literacy learning experience for students.
- The formative assessment process is the strongest tool to support and accelerate learning and growth.
- To design effective literacy instruction for all students, educators need skill and understanding in several key areas: how reading develops, how to align instruction to grade-level standards, how to identify where each student is on the learning progression, and how to effectively use differentiated practices and tiered instructional supports to move all students forward in their literacy learning.
- All instructional support for students with reading and writing difficulties should be provided in addition to high-quality core literacy instruction.
- It is important to ensure coherence in high-quality instructional materials, strategies, and routines across the support continuum to create a connected literacy learning experience for students.
- It is through assessing student learning on multiple occasions using multiple methods that a true picture of student strengths and their learning edges are revealed.
- At their best, formative assessment practices and literacy tests can help learners understand where they are in the learning process and identify their next moves in reading and writing.

### LEARN MORE

- [Formative Assessment Resources](#)
- [Limitations of Norm-Referenced Tests](#)
  - [Training Materials](#)
- [Culturally Sensitive, Relevant, Responsive, and Sustaining Assessment](#)
- [Anti-Racist Assessment Practices](#)

<sup>178</sup> Cole, 2008

# Section 8: Reaching All Learners

All students deserve to actively engage in literacy learning. This gives them the power to shape ideas through acts of reading, writing, speaking, and listening. In many ways this framework serves as a resource for the instructional core, or Tier 1, instruction. In this section, however, thoughtful adaptation for literacy instruction that meets the strengths and needs of all students is explored.

With appropriate support, careful planning, and adult mindsets that are asset-based, students can fully engage in the general education classroom during core literacy instruction. Successful adaptation may include: sheltering instruction, adapting materials, previewing learning, personalizing learning goals, peer tutoring, compacting curriculum, and co-teaching. Reaching all learners requires understanding and applying the ideas described in previous sections, while also adjusting and considering the unique strengths and needs of each student.

All students have the right to learn something new every day, whether they are in regular classrooms or in special education, language acquisition, or gifted programs. And every student will benefit from being pulled up to go beyond the curriculum at times.<sup>179</sup>

## Supporting Multilingual Learners

Every student, whether they communicate in one language or multiple languages, is a language learner. From this lens, the inherent commonality around language learning helps to ensure that students who are navigating the world through more than one language are affirmed in the additional cognitive and socio-linguistic lift they navigate daily. When children are honored as multilingual learners and provided opportunities to build from their linguistic assets, it contributes to literacy growth, motivation, and efficacy.



<sup>179</sup> [Tomlinson et al., 2003](#)

Oregon’s Early Literacy Framework is primarily written from the lens of developing literacy for multilingual learners within an English instructional model. While best practice for supporting multilingual learners’ literacy development is to build upon their linguistic repertoire through multilingual instructional programs such as dual language education, the majority of multilingual learners in Oregon currently learn to read in monolingual English settings. Wherever possible, best practices for multilingual learners participating in dual language education with biliteracy as the intended outcome is incorporated throughout the framework.

Multilingual learners deserve comprehensive literacy instruction alongside their monolingual peers, with the full guarantee of daily core instruction as an essential driver for literacy learning. The pervasive and misguided belief that multilingual learners must first demonstrate grade-level English proficiency before they can access grade-level work or text often results in multilingual learners being pulled out of core literacy instruction or assigned less rigorous tasks that reduce cognitive demand. This, in turn, creates less access to essential content and language-rich exposure, creating lasting impacts and long-term consequences for students’ self-efficacy and literacy proficiency.<sup>180</sup> The cumulative effect of limiting exposure to content and language-rich learning experiences for multilingual learners has deleterious and far-reaching effects. While additional explicit instruction might be needed for students to gain literacy proficiency, interventions or English Language Development support should not come at the expense of students’ access and exposure to quality, grade-level literacy learning. All students need opportunities to participate in challenging academic work that promotes deep disciplinary knowledge and encourages higher order thinking skills.<sup>181</sup>

## Multilingual Learners in Monolingual English Settings

The majority of multilingual learners in Oregon are developing literacy in English instructional programs, as opportunities for dual immersion, native language learning, and/or bilingual programming have yet to be realized statewide. For multilingual learners in an English-only instructional context, language and literacy development must happen throughout the instructional day with continued and sustained opportunities to practice language across domains.

Comprehensive literacy instruction, inclusive of the following essential practices, supports multilingual learners in a monolingual English setting to develop proficiency in reading, writing, speaking, and listening. The same components that accelerate and support language and literacy development for multilingual learners benefit all students’ language and content learning.<sup>182</sup> Simply put, instructional practices that support multilingual learners also support monolingual English speakers. These include but are not limited to:<sup>183</sup>

- Developing literacy within a comprehensive approach that includes language development, teaching foundational skills in context, and the integration of meaning-making across content areas.
- Strengthening oral language development through explicit connections to reading and writing instruction.
- Placing emphasis on comprehension as the primary goal of reading.
- Attending to the close relationship between reading, writing, listening, and speaking.
- Building upon and affirming students’ home language and cultural practices.
- Providing sheltered instruction to build on students’ background knowledge while leveraging comprehensible input as a core instructional strategy.

<sup>180</sup> García & Kleifgen, 2018

<sup>181</sup> García & Kleifgen, 2018

<sup>182</sup> [Escamilla et al., 2022](#)

<sup>183</sup> From [Escamilla et al., 2022](#)

- Recognizing that sociocultural factors play a major role in students' learning and promoting an asset-oriented school and classroom climate is essential to supporting literacy development.
- Encouraging families to continue literacy development in their home language through read-alouds and oral conversations.<sup>184</sup>

Building strong foundational reading skills in language comprehension and word recognition is important, but insufficient, for multilingual students' overall reading and literacy development.<sup>185</sup> Therefore, when designing literacy instruction to support multilingual learners, students' literacy skills and language development need to be supported. To more successfully facilitate English literacy acquisition for multilingual learners, effective literacy instruction emphasizes explicit teaching of both oracy and literacy.<sup>186</sup> Intentionally designing English literacy instruction to support multilingual learners includes a focus on linguistic transfer, including cognates; explicit instruction about phonemes that are not present within a student's home language; and incorporating students' home language(s) when possible through paired readings.<sup>187</sup>

Lastly, while multilingual learners in monolingual settings benefit from foundational skills that are taught and reinforced in the context of the core literacy block, it is not appropriate for foundational skill practice to comprise the entirety of English language development. Multilingual students benefit most from cognitively demanding context-embedded English language development instruction designed to develop vocabulary, scaffold discourse, build and reinforce reading and writing skills, and hone oral language skills.<sup>188</sup> English language development instruction should be intentionally aligned to English Language Proficiency standards<sup>189</sup> while taking into account each student's English language proficiency in order to design learning experiences that are within their zone of proximal development.

## Multilingual Learners In Bilingual/Dual Immersion Settings

To recognize and build from the assets of multilingualism, understanding multilingual learners' lived experiences, how they learn, and how they acquire English is essential.<sup>190</sup> Literacy development for students with two or more languages is distinctly different from the literacy development of monolingual students. "The degree to which the dual language brain is leveraged or ignored spells a major difference between effective and ineffective/exclusionary literacy instruction for dual language learners."<sup>191</sup>

Multilingual learners who participate in dual language programs simultaneously develop literacy skills in their home language and in English. Dual language education promotes the explicit goal of biliteracy by developing foundational skills in the multilingual learner's home language, strategically aligning literacy instruction across two languages, and encouraging cross-linguaging, transfer, and metalinguistic skills. Importantly, dual language classrooms incorporate assessments in two languages, building from the strengths of the home language to develop fluency in the second language.<sup>192</sup>

184 García & Kleifgen, 2018

185 [Escamilla et al., 2022](#)

186 Hoover et al., 2016

187 Cárdenas-Hagan, 2020

188 Cummins, 1984

189 Council of Chief State School Officers, 2014

190 [Herrera et al., 2022](#)

191 [Escamilla et al., 2022](#)

192 Abdelkader et al., 2022

Essential practices that promote biliteracy within dual language instruction include:

- Developing home language and literacy alongside English language and literacy.<sup>193</sup>
- Integrating oral language and literacy instruction into content-area teaching<sup>194</sup> in both home language(s) and English.
- Teaching academic vocabulary intentionally using a variety of instructional activities.<sup>195</sup>
- Providing regular, structured opportunities to develop written language skills, alongside small-group instruction in areas of literacy and English language development.<sup>196</sup>
- Leveraging cross-language connections that promote transfer and engage students in translanguaging.<sup>197</sup>
- Implementing assessment practices such as screeners, and formative and summative assessments in the student’s home language and English.
- Encouraging families to continue literacy development in their home language through read-alouds and oral conversations.<sup>198</sup>

It is widely understood that students’ English proficiency will take longer to reach in a dual immersion context than that of monolingual peers.<sup>199</sup> Assessment practices for multilingual learners supported in dual immersion settings must account for the 5–7 year timeline for multilingual learners to achieve parity with English speakers in terms of English literacy acquisition.<sup>200</sup> For this reason, it is essential that students are provided multiple ways to demonstrate literacy proficiency, that progress in their home language is assessed and affirmed, and that students are not erroneously identified for special education simply because of latent English development.<sup>201</sup>

While additional time, skills practice, oral language development, and explicit instruction may be necessary for students not yet reading in English at grade level, the student’s access to quality, grade-level literacy learning should not be limited or replaced by remedial efforts.<sup>202</sup>

“In general, education practitioners have had difficulty distinguishing between sociocultural/ sociolinguistic factors (including language development) and disabilities, which has prompted calls for specific training in this area.”

Herrera et al., 2022

193 August & Shanahan, 2006; Riches & Genesee, 2006

194 [Baker et al., 2014](#)

195 [Baker et al., 2014](#)

196 [Baker et al., 2014](#)

197 [García, 2009a](#)

198 García & Kleifgen, 2018

199 Lindholm-Leary & Howard, 2008

200 Lindholm-Leary & Howard, 2008

201 Lindholm-Leary & Howard, 2008

202 Kieffer, 2020; Kieffer & Thompson, 2018

While the literacy learning arc for students learning in multiple languages can be longer than students learning in monolingual instructional programs, the benefits are far-reaching. Impressively, the bilingual brain is stronger, more pliable, and demonstrates higher levels of synthesis and sense-making across content areas.<sup>203</sup> Moreover, research supports that students in dual immersion settings gain additional social, cognitive, and familial benefits associated with becoming fully biliterate.<sup>204</sup> Over time, multilingual learners participating in high-quality dual language programs perform at or above English-speaking students in English-only classrooms.<sup>205</sup> The benefits of biliteracy are compelling—dual immersion instruction is a significant lever for increased literacy outcomes in Oregon.

#### KEY TAKEAWAYS FOR MULTILINGUAL LEARNERS

- All students are language learners. Multilingual learners simply require an intentionality in language instruction that is ultimately of benefit to all students in the classroom.
- Multilingual learners deserve affirmation and intentional linkage between known language and new skills.
- All students have a right to core literacy instruction. Any needed language interventions must be offered outside core literacy instruction blocks.
- Multilingual learners desire and deserve challenging content and context embedded language development alongside any needed foundational language skills.
- Literacy development for those with two languages is different from the monolingual speaker. Maximizing learning requires knowledge of each student’s language context.
- English proficiency may take longer to reach than that of monolingual peers. Assessment must be informed and nuanced to account for the possibility of language development range.
- Multilingual learners benefit from classroom settings where oral language use is emphasized, and student-to-student interaction is promoted.
- The benefits of multilingual language learning are varied and research supported.

#### LEARN MORE FOR MULTILINGUAL LEARNERS

- [Bilingual Site for Educators and Families](#)
- [Translanguaging to Support Students’ Bilingual and Multilingual Development](#)
- [Literacy for Multilingual Learners](#)
- [Supporting Early Literacy for Multilingual Learners](#)
- [Multilingual Learning Toolkit](#)
- [The Science of Reading Progresses: Communicating Advances Beyond the Simple View of Reading](#)
- [How Does the Science of Reading Apply to Teaching Multilingual Learners?](#)

203 Lindholm-Leary & Howard, 2008

204 [Baca, 2018](#)

205 Hamayan et al., 2013

# Supporting Students with Reading Difficulties, Reading Disabilities, & Dyslexia

Supporting students experiencing reading difficulties, such as dyslexia, is crucial to ensuring every child has the opportunity to thrive academically and personally. Dyslexia affects a portion of the population and can pose unique challenges for both students and educators. With comprehensive, evidence-based support, students with reading difficulties, including dyslexia, can achieve at the highest levels. Oregon has established a strong framework for early identification and prevention of reading difficulties through its dyslexia policies. Oregon dyslexia policies (OAR 581-022-2440<sup>206</sup> and OAR 581-002-1805<sup>207</sup>) require both teacher training<sup>208</sup> and universal screening<sup>209</sup> as part of a comprehensive model of assessment and support for all students.

Select resources from ODE related to dyslexia and students experiencing disability: [Dyslexia Website](#), [Guidance on Screening and Instructional Support](#), and [Specially Designed Instruction and Least Restrictive Environment Considerations for IEP teams](#).

Oregon law requires universal screening for risk factors of reading difficulties, including dyslexia, beginning in kindergarten, although individual student circumstances could require earlier assessment of a child's strengths and needs. Identification of students with characteristics of dyslexia is a process that incorporates multiple steps and sources of information. Once universal screening results are analyzed, then students are provided with instructional support, progress monitoring, and additional assessment to guide more intensive instructional interventions. The success of this model depends upon the provision of explicit, systematic, evidence-based instruction provided by qualified educators across all tiers of support.

- **Step 1: Complete universal screening.** The role of universal screening in primary grades to identify students who are in need of reading instructional support has been widely studied. The old saying, "Just wait and they will catch up," does not hold up to all the empirical data and support for providing early intervention for struggling readers. Whenever possible, students should also be assessed in their native language, especially if they have had some formal native language instruction. Districts should gather additional information about the student's literacy background including exposure to English and the structure of the native language and use this information to help interpret screening results and to inform instruction.
- **Step 2: Provide instructional support for students who demonstrate the need for additional support and monitor their progress.** Schools should begin intervening early to address skill areas as indicated by the universal screening measures. Students should start receiving interventions of sufficient intensity based on student need as soon as possible. For many students, early intervention can be provided within the context of the core reading program through differentiated and small-group instruction. Other students may require additional instructional support beyond the core reading as described above. Student progress and growth should be closely monitored to see if the targeted intervention is effective for the student. This type of progress monitoring is targeted and specific for an individual student, and is more individualized than more general class progress monitoring described in [Section 7: Core Instruction & Assessment](#).

206 [Teacher Training Related to Dyslexia, 2018](#)

207 [Annual List of Dyslexia-Related Training Opportunities, 2018](#)

208 [ODE, 2018a](#)

209 [ODE, 2022a](#)

- **Step 3: Administer informal diagnostic measures and connect with families to learn more about family history relative to difficulty learning to read or write for students who do not make adequate progress.** Administering informal diagnostic assessments that identify a student's specific areas of strength and need will provide educators with information that is needed to further inform instruction. Informal diagnostic assessment consists of completing a more in-depth skills development inventory on a narrow skill area. In addition to gathering informal diagnostic data, school teams should screen for a family history of difficulty in learning to read if a student demonstrates risk factors for reading difficulties, including dyslexia. Because dyslexia is neurobiological in origin and often runs in families, this family screening may provide important information related to the potential source of a student's reading struggle. To support family engagement and therefore children's learning, educators and schools should center these important conversations within culturally responsive and supportive partnerships.
- **Step 4: Intensify instructional support as needed based on student-level assessment data and continue monitoring progress.** Using the data collected from the informal diagnostic assessments, school teams should provide more intensive instructional support to those students who do not make adequate progress despite the provision of evidence-based support in addition to core instruction. Instructional support and intervention may be intensified by factors such as: providing more time, reducing group size, increasing engagement strategies, and addressing a broader range of skills.
- **Step 5: Begin Individualized Problem Solving/Data-Based Individualization to adapt the intervention as needed and continue progress monitoring for students who do not make adequate progress.** This data-informed approach involves collecting detailed information about the curriculum, instruction, environment, and learner characteristics to develop a comprehensive plan of support. In this phase of support, teams continue to collect diagnostic data and implement validated interventions but use adaptation strategies to further individualize the support. If student-level data indicate that additional accommodations or specialized instruction beyond tiered instructional supports may be required, school staff may refer a student for a 504 plan or special education evaluation.

Although it reflects another state context, [Michigan Dyslexia Handbook: A Guide to Accelerating Learner Outcomes in Literacy](#) includes many helpful resources:

- An explanation of dyslexia.
- A graphic showing the myths vs. facts about dyslexia.
- Best practices to prevent reading difficulties associated with the primary consequences of dyslexia.
- Information about the assessment practices needed to inform instruction and intervention methods for learners with dyslexia characteristics.

## Special Education Eligibility Processes

Culturally responsive teaching and problem-solving are essential elements of inclusive and equitable learning environments that can support appropriate special education eligibility processes. The following recommendations aim to reduce disproportionality in special education eligibility due to racial and linguistic bias while still ensuring that all students receive the support they need. Through the use of culturally responsive and comprehensive, coherent systems of instruction and assessment, school teams can more accurately identify students who are experiencing a specific learning disability.

Students may need more support than general education provides in order to achieve grade-level literacy expectations. By employing fair and sensitive approaches to problem-solving that respect and incorporate the diverse cultural backgrounds of all students, educational teams can accurately discern between students who have a specific learning disability and those who have not yet demonstrated grade-level skills because they have not been given appropriate instruction.

For example, sometimes a student may not make expected progress or may not respond to interventions as measured by progress monitoring data. In this scenario, staff should continue providing core instruction and targeted interventions while also initiating a problem-solving process.<sup>210</sup> This process leads teams to develop a more intensive, data-based and individualized instructional support plan based on student strengths and areas of need. Implementing this support plan may lead to improvement in student performance and may prevent inappropriate referrals to special education. However, it is important to note that this process cannot delay a timely initial special education evaluation for children suspected of having a disability. If the need for a special education referral arises, the information gathered from the problem-solving process can inform the special education evaluation and eligibility process.

#### GUIDING QUESTIONS TO INTERRUPT BIAS WHEN CONSIDERING THE NEED FOR INITIAL EVALUATION FOR SPECIAL EDUCATION:<sup>211</sup>

How is the education team...

- considering perspectives other than the initial presentation of the student concern? (*Presenting Initial Concern*)
- operationalizing an area of need that is focused on instruction, classroom management, student skills, and/or teacher skills? (*Identifying the Area of Need*)
- identifying a low-inference, alterable, and measurable hypothesis that explains why the problem is occurring? (*Identifying a Hypothesis for Area of Need*)
- using strategies to mitigate implicit bias, including in the collection of data? (*Collecting Data*)
- considering all the data and identifying common themes to verify the problem and confirm the hypothesis? (*Interpreting Data*)
- selecting an evidence-based intervention based on what the data reflects? (*Selecting Evidence-Based Interventions*)
- using strategies to improve the cultural responsiveness of the intervention during selection and progress monitoring? (*Improving Cultural Responsiveness of Intervention*)

## Supporting Students Experiencing Disabilities Through Special Education

Most students, including those experiencing disabilities, benefit from deep learning in the general education classroom with appropriate supports such as accommodations, adapted materials, individualized goals or objectives, and co-teaching. In some cases, students need more direct, explicit, and targeted literacy interventions. The Individuals with Disabilities Education Act (IDEA) mandates that students who experience disabilities have a free appropriate public education, often referred to as FAPE, that is individualized to meet their respective needs. As with all students, those who experience disabilities benefit most from inclusive, student-centered, and intentional instruction. When it is determined that students are eligible for special education services, they must have an Individualized Education Program (IEP), designed by an appropriate team, that enables access to a free appropriate public education in the least restrictive environment.

<sup>210</sup> [The IRIS Center, 2022](#)

<sup>211</sup> [Newell, 2017](#)

For students with specific reading and writing difficulties, the IEP provides an opportunity to work collaboratively to set goals for literacy and identify teaching and learning supports. A student experiencing a specific learning disability, such as dyslexia, may be eligible for an IEP if it is determined that special education is required. Additionally, not all disabilities impact literacy in the same way. Although reading disabilities (e.g., dyslexia) are the most common specific learning disability, there are a variety of other disabilities that can impact students' literacy trajectories.

### Specially Designed Instruction and Related Services<sup>212</sup>

Students experiencing disabilities are general education students first and, unless another arrangement is required by their Individualized Education Program, they need access to whole group core instruction. In addition to general education support, Specially Designed Instruction and related services must be provided as mandated in each eligible student's IEP. In the context of literacy, related services may include speech–language therapy, occupational therapy, or physical therapy. Special education is intended to make high–quality core instruction accessible and enable students to meet their annual IEP goals.

IEP teams should take a broad view of instruction and carefully consider the special education required to enable the provision of free appropriate public education and access to the general curriculum for each eligible child. Special educators should adjust the content, methodology, or delivery of core instruction based on a student's IEP. Specially Designed Instruction should enhance and build upon general education curriculum and instruction.

### Accessibility in the Early Literacy Classroom<sup>213</sup>

One way to increase access and remove barriers for students experiencing disabilities is through the use of accessible materials, formats, and technologies. Universally designed classrooms should include multiple means of access to materials for all students, not just those students with specific accommodations listed on IEPs. The National Center on Accessible Educational Materials offers four categories to describe accessibility.

- **Accessible educational materials** are print- and technology-based educational materials, including printed and electronic textbooks and related core materials that are designed or enhanced in a way that makes them usable across the widest range of learner variability, regardless of format (e.g., print, digital, graphic, audio, video). Accessible educational materials make literacy core instructional materials accessible to all learners.
- **Accessible formats<sup>214</sup>** provide the same information in another form to address the barriers text-based materials can present for some learners. Examples of accessible formats include audio, braille, large print, tactile graphics, and digital text conforming to accessibility standards.
- **Accessible technologies** are the hardware devices and software that provide learners access to the content in accessible digital materials. These technologies are designed to be flexible and provide the support that benefits everyone – they are universally designed.
- **Assistive technologies** are technological systems and services that assist a student who experiences a disability to access their environment, resources, or materials. Some examples of assistive technology in the literacy learning environment include text-to-speech, speech recognition, and screen readers.

212 [ODE, n.d-f](#)

213 [AEM Center, n.d.](#)

214 [CAST, 2021](#)

### KEY TAKEAWAYS FOR SUPPORTING STUDENTS WITH READING DIFFICULTIES, READING DISABILITIES AND DYSLEXIA

- The aims of literacy instruction apply to all children; with modifications, accommodations, supports, and technologies, every child must have access to literacy learning.
- Early screening matters. Districts must universally screen for risk factors indicative of reading difficulties, including dyslexia, in kindergarten.
- Prevention of early reading difficulties must include increasingly intensified and individualized instructional support matched to students' areas of strength and need.
- To the maximum extent appropriate, all instructional support for students with reading and writing difficulties should be provided *in addition to* high-quality core literacy instruction.
- Instructional supports must be informed by multiple data sources and matched to areas of strength and need.
- Identifying where each student is on the learning progression supports effective use of differentiated practices and tiered instructional supports.
- Ensuring accessibility through alternative formats and technology is an important way to enhance access.
- Through the use of culturally responsive and comprehensive, coherent systems of instruction and assessment, school teams can more accurately identify students who are experiencing a specific learning disability.

### LEARN MORE FOR SUPPORTING STUDENTS WITH READING DIFFICULTIES, READING DISABILITIES AND DYSLEXIA

- [MTSS for Reading Component Module Series](#)
- [The Universal Design for Learning Guidelines](#)
- [Literacy in the Inclusive Classroom](#)
- [Intensifying Literacy Instruction – Essential Practices](#)
- [High Leverage Practices in Special Education](#)
- [Data-Based Individualization: A Framework for Intensive Intervention](#)
- [The Pre-Referral Process: Procedures for Supporting Students with Academic and Behavioral Concerns](#)
- [Intensive Intervention \(Part 1\): Using Data-Based Individualization To Intensify Instruction](#)
- [Intensive Intervention \(Part 2\): Collecting and Analyzing Data for Data-Based Individualization](#)
- [Considerations When Planning Literacy Instruction for Students with Intellectual Disabilities](#)

# Talented & Gifted Students

Gifted readers often develop reading skills easily and become proficient readers at an early age. It is not unusual for gifted readers to process text quickly, comprehend above-grade level text, and sustain reading for an extended period of time. Gifted readers may be highly verbal and use advanced language and vocabulary in any language with ease. They may also excel in creative writing, literary analysis, oral communication, linguistic and vocabulary development, and multilingual learning.

Early informal and formal classroom assessment may reveal students who already meet or exceed grade-level expectations for reading, writing, and other literacy skills. A child who is beyond grade-level proficiency in the area of reading or writing may or may not be officially identified as Talented and Gifted, yet deserves learning opportunities that foster their academic growth and provide appropriate rigor. Contrary to commonly held beliefs that talented and gifted students may be fine without additional instructional support, “gifted students have special needs; they are at risk of learning the least in the classroom.”<sup>215</sup>

While there are several areas of giftedness identification, students who are gifted in reading and language share some common characteristics:<sup>216</sup>

- Reading early and at an advanced level.
- Using metacognitive processes (thinking about thinking) in reading.
- Reading with enthusiasm for topics of interest.
- Demonstrating advanced language skills in any language and in any domain (i.e., oral, reading, and writing).

Multilingual learners are underrepresented in Talented and Gifted programs for many problematic reasons, including assessments contingent on proficiency in English and educator bias. Using native language ability and achievement assessments as indicators of potential giftedness, in addition to family interviews, are important pathways for Talented and Gifted identification of multilingual learners. Perhaps even more importantly, educators must develop new ways of seeing multilingual children as gifted, bringing an asset-based perspective that honors the incredible strength of the multilingual brain.

Giftedness can have varying meanings across cultures. Some researchers have re-defined giftedness among English language learners. Gifted English learners can display a wide range of skills, for example, the ability to:

- Acquire a second language at an accelerated rate
- Respect and appreciate languages and cultures that differ from their own
- Perform well in mathematics
- Switch between English and their native language with ease, sometimes referred to as code-switching
- Interpret the English language
- Grasp and use American idioms and expressions
- Adapt behaviors so that they are culturally relevant and appropriate

REL Northwest<sup>217</sup>

215 Choice & Walker, 2011

216 [Reis, 2012](#)

217 [Regional Educational Laboratory Northwest, n.d.](#)

**Table 6. Supporting Gifted and Talented Readers**

<b>Instead of This:</b>	<b>Do This:</b>
Treating all gifted readers as a homogenous group who all love to read...	Acknowledge that gifted and talented readers are a diverse group with varied intellectual, emotional, cultural, and linguistic differences. Some may be reluctant readers, despite their giftedness.
Assuming gifted and talented readers are experts at text comprehension, and do not need specific reading instruction...	Provide instructional strategies for developing deeper insights into the subtleties of literary selections, understanding nuances of meaning, and mastering advanced-level informational content. Even though most gifted and talented readers have highly developed comprehension skills, especially in comparison to peers of their age, they still benefit from specific reading strategies.
Allowing gifted readers to be entirely autonomous in their learning and self-selecting all of their reading materials...	Encourage students to broaden their repertoire of reading material to ensure access to complex content, vocabulary, genre and text structure. While choice in reading materials is one of the essential components of a reading program for gifted and talented readers, it should be balanced with teacher-assigned reading
Providing talented readers with the same instruction...	Differentiate according to advanced readers' strengths and needs.

While many of the strategies listed below are appropriate for all students, they are especially effective for supporting literacy growth for Talented and Gifted students:<sup>218</sup>

- Utilize assessment practices to determine curriculum compacting.<sup>219</sup>
- Provide access to challenging reading materials that include both depth and complexity.
- Deepen reading comprehension skills using a framework such as Webb's depth of knowledge to increase the complexity of thinking.<sup>220</sup>
- Model and expand students' metacognitive processes (thinking about thinking) while they are actively reading text.
- Develop critical thinking and analysis skills through reading and comparing a variety of genres and modes and encouraging writing in response to reading.
- Include representation of students' identity by offering diverse, multicultural literature across multiple genres.
- Intentionally provide opportunities for group discussion of selected texts, using readiness grouping or precision pairing designed to drive and elevate student discourse and growth.
- Foster student agency by providing opportunities for students to choose texts based on genre preference or advanced study on topics of interest.
- Encourage creative reading behaviors, including writing and dramatic interpretation.

218 [Wood, 2008](#)

219 [National Association for Gifted Children, 2014](#)

220 [Webb, 1997; Webb, 2002](#)

To meet the strengths and needs of gifted learners, differentiated instruction should account for their current proficiency level, depth of knowledge, critical and creative thinking skills, and accelerated rates of learning. Not all literacy-gifted students are the same; each student needs appropriately designed instructional strategies that reflect their learning profile.<sup>221</sup> Differentiation is critical for all students, and especially for students who are considered twice-exceptional, also referred to as “2E.” Students who are twice-exceptional are gifted, and may also experience a special need or disability. When planning for literacy instruction for twice-exceptional students, coordination between general education staff, special education specialists, and the Talented and Gifted coordinator is critical to ensure that children who are twice-exceptional are provided appropriate targeted support.<sup>222</sup>

#### KEY TAKEAWAYS FOR TALENTED AND GIFTED

- Multilingual learners are disproportionately underrepresented in Talented and Gifted programs. It is important, therefore, for educators to be responsive to ways that multilingual learners demonstrate giftedness.
- Students may enter the classroom meeting and exceeding grade-level benchmarks; they deserve access to strategic instructional practices that provide appropriate academic challenges and opportunities to foster academic growth.
- Differentiating instruction, including depth of knowledge, critical and creative thinking skills, and accelerated rates of learning is critical to sustain engagement for gifted readers.
- Ultimately, giftedness is more than a reading level or an enrichment activity. When teachers look at a gifted student's needs, they need to assess the whole student, and be aware of students who may be twice-exceptional.

#### LEARN MORE FOR TALENTED AND GIFTED

- [Improving the Identification of English Learner Students for Talented and Gifted Programs](#)
- [Advanced Learner Multi-Tiered System of Support Guide](#)
- [National Association for Gifted Children: A Position Statement](#)
- [Gifted and Dyslexic: Identifying and Instructing the Twice Exceptional Student](#)
- [Booklists for Talented Readers](#)
- [Talented and Gifted Education \(from ODE\)](#)
- [Tips for Identifying Gifted English Learner Students](#)

221 [Wood, 2008](#)

222 [National Association for Gifted Children, 2015](#)

# Appendix A: Acknowledgments

Thank you, first and foremost, to every Oregon student, our most important focus. As you strive forward in writing, reading, speaking, listening, and thinking deeply, you inspire those around you. The world wants to hear your voice, which is why Oregon cares about your literacy achievement.

Thank you to families and caregivers; as your child's first teacher you are seeding language and literacy through song, story, and the languages of your home.

Thank you to every educator and literacy leader making literacy come alive for Oregon children, taking ideas from paper into practice. You are doing powerful and important work; we see you and honor you.

Thank you to everyone who read the Preview Draft version of Oregon's Early Literacy Framework and provided feedback and suggestions. Additionally, thank you to all 152 participants who participated in more than 21 focus groups to provide feedback on the framework. Your input made the final version of the framework stronger and better.

Thank you to the specialists within the Oregon Department of Education whose work directly connects to literacy and who tirelessly contributed to this effort—sharing their insights, feedback, and synthesizing the latest research. Thank you, too, to countless ODE colleagues who helped in the creation of this document. It would not have been possible without you!

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Thank you to the Literacy Leadership State Steering Committee that worked in 2009 to publish Oregon's K-12 Literacy framework along with the Center on Teaching and Learning in the College of Education at the University of Oregon. The 2009 Literacy Framework has been a foundational resource and has informed key parts of ODE's most recent effort.

Thank you to each state who came before in updating their state-wide literacy framework, and thank you, especially, to those who generously provided permission for us to build upon their work. Our gratitude to the Michigan Department of Education, the Massachusetts Department of Elementary and Secondary Education, and the Tennessee Department of Education.

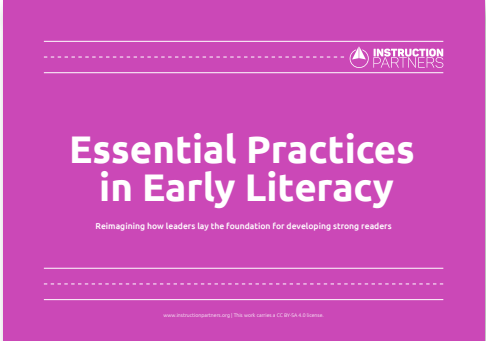
We are also grateful for and credit the work done by the National Committee for Effective Literacy and their generosity in terms of time and content. Likewise, we are thankful to the Instruction Partners for creating such a thoughtful playbook for implementing early literacy practices and for openly licensing it.

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Thank you to Governor Kotek for her call to action around literacy learning in Oregon, recognizing that when students develop essential early literacy skills it makes all other learning possible. With a focus on centering families as children's first teachers, ensuring classrooms are culturally responsive, and highlighting the importance of supporting educators in on-going professional learning, Governor Kotek is clear that Oregon must commit to early literacy success. Her advocacy for literacy and endorsement of this framework is foundational to realizing real change for young readers and writers in Oregon.

# Appendix B: Companion Guidance Documents & Resources

## Document

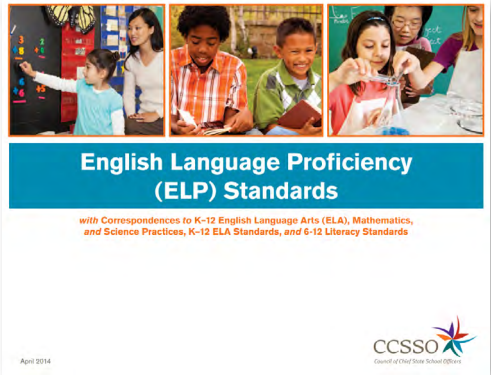


## Description

Instruction Partner’s [Early Literacy Implementation Playbook](#) provides ready-to-use, step-by-step guidance. Early literacy leaders and educators can use this playbook to strengthen and monitor literacy development in their school or system, whether building the essential implementation practices from scratch or tuning up what they already have in place.



[English Language Arts and Literacy Standards](#): Oregon’s most recent English Language Arts and Literacy standards were adopted in 2019. These standards are grounded in research and align with the science of reading. They set the expectations for classroom teaching outcomes.



[English Language Proficiency Standards](#): The State Board of Education approved the latest English Language Proficiency standards in October 2013. The English Language Proficiency Standards highlight and amplify the critical language, knowledge about language, and skills using language that are necessary for multilingual learners to be successful in schools.



# Appendix C: Glossary

For alignment, we have defined the following terms as they are used within the Oregon Early Literacy Framework.

- **ALPHABETIC PRINCIPLE:** sounds in speech (phonology) relate intentionally and conventionally to the letters of the English alphabetic writing system (i.e., orthography). English has a deep orthography where levels of phonology and awareness of meaningful units (morphology) are critical to learning to read. Levels of phonology are the word, syllable, onset-rime (medial vowel and final consonant as in *-at* in *cat*), and phoneme. Phonemes are the minimal unit of meaningful sound (e.g., the medial vowels in *pin* and *pen* are distinct phonemes denoting different words in most dialects of English but not in all dialects). Morphemes are the minimal units of meaning: prefixes, suffixes (inflectional or derivational), roots (*flex* in *flexible*), and base words (which can stand alone without other morphemes). The morphophonemic nature of English becomes apparent when noticing that *signal* consists of the base word *sign* plus the suffix *-al* (Foorman, 2023).
- **ASSESSMENT:** the wide variety of methods or tools that educators use to evaluate, measure, and document the academic readiness, learning progress, skill acquisition, or educational needs of students.<sup>223</sup>
- **TEXT COMPLEXITY:** the level of difficulty in reading and understanding a text based on a series of factors: the readability of the text, the levels of meaning or purpose in the text, the structure of the text, the conventionality and clarity of the language, and the knowledge demands of the text.<sup>224</sup> Complex texts are texts that provide an appropriate level of rigor aligned with grade-level expectations.
- **COGNATE:** words in two languages that share a similar meaning, spelling, and pronunciation.<sup>225</sup>
- **CORE INSTRUCTION:** high-quality instruction in the general education setting that is aligned to grade-level standards, centered around grade-level-aligned materials, and inclusive of every student in the classroom, regardless of performance level.<sup>226</sup> Sometimes also referred to as Tier I Instruction, this is the primary prevention for reading and writing difficulty. It maximizes learning by providing access to peer learning models, the classroom teacher, and grade-level aligned texts and tasks.
- **COMPREHENSION:** intentional thinking about and understanding of the content of a text (comprehension is a summative skill that is supported by a student's aptitude in the other four pillars). One of the Five Pillars of Reading.<sup>227</sup>
- **CULTURALLY RELEVANT PEDAGOGY:** helps students to accept and affirm their cultural identity while developing critical perspectives that challenge inequities that schools (and other institutions) perpetuate.<sup>228</sup>
- **CULTURALLY RESPONSIVE:** the implicit recognition and incorporation of the cultural knowledge, experience, and ways of being and knowing of students in teaching, learning, and assessment. This includes identifying, valuing, and maintaining a high commitment to: students' cultural assets in instruction and assessment; diverse frames of reference that correspond to multifaceted cultural perspectives/experiences; and behaviors in the classroom that can differ from White-centered cultural views of what qualifies as achievement or success.<sup>229</sup>

223 [Great Schools Partnership, 2015](#)

224 [Louisiana Department of Education, 2014](#)

225 [Colorín Colorado, 2007](#)

226 [Bowen, 2021](#)

227 [National Reading Panel, n.d.](#)

228 Ladson-Billings, 1995

229 [ODE, n.d.-a](#)

- **CULTURALLY SUSTAINING PEDAGOGIES:** “[seeks] to perpetuate and foster—to sustain—linguistic, literate, and cultural pluralism as part of schooling for social transformation.”<sup>230</sup>
- **DECODING:** Translating a word from print to speech by using knowledge of phoneme-grapheme, or sound-symbol correspondences.
- **DIAGNOSTIC TEACHING:** teaching that individualizes instruction based on information collected from the continuous assessment that includes a combination of informal diagnostic assessments and lesson observation.<sup>231</sup>
- **DYSLEXIA:** a specific learning disability that is neurobiological in origin. It is characterized by difficulties with accurate or fluent word recognition, or both, and by poor spelling and decoding abilities. These difficulties typically result from a deficit in the phonological component of language that is often unexpected in relation to other cognitive abilities and the provision of effective classroom instruction. Secondary consequences may include problems in reading comprehension and reduced reading experience that can impede the growth of vocabulary and background knowledge.<sup>232</sup>
- **EARLY LITERACY:** refers to the skills outlined by Oregon’s English Language Arts Standards for grades K–5 inclusive of reading foundational skills (e.g., print concepts; phonological awareness; phonics and word recognition; fluency); comprehension; language and vocabulary; writing; speaking and listening. These standards are reflective of the literacy skills and knowledge that begin developing prior to students’ entry into kindergarten and which will continue to develop over time and lay a foundation for further and more advanced literacy development in later grades.
- **ENCODING:** translating speech into print (writing) using knowledge of phoneme-grapheme, or sound-symbol correspondences.
- **ENGLISH LEARNER:** Oregon House Bill 3499, passed in 2015, defines English Learner as a student who has limited English language proficiency because English is not the native language of the student or the student comes from an environment where a language other than English has had a significant impact on the student’s level of English language proficiency.<sup>233</sup> More recently, the term Multilingual Learners is sometimes preferred, as it decenters English and is more inclusive of all students who speak two or more languages.
- **EVIDENCE-BASED LITERACY PRACTICES:** refers to instructional practices with a proven record of success based on reliable, trustworthy, and valid evidence that when the instructional practices are implemented with fidelity, students can be expected to make adequate gains in literacy achievement.<sup>234 235</sup>
- **EXECUTIVE FUNCTION SKILLS:** higher-order self-regulatory neurocognitive processes used for complex tasks. These skills include cognitive flexibility, working memory, inhibitory control, attention, and planning.<sup>236</sup>
- **EXPLICIT INSTRUCTION:** direct, face-to-face teaching that involves teacher explanation, demonstration, and the provision of ongoing corrective feedback.<sup>237</sup>
- **EXPLICIT, SYSTEMATIC INSTRUCTION:** code-based foundational reading instruction that moves early readers and writers along a continuum of skills in the areas of print concepts, phonological awareness, phonics and word recognition, and fluency, which are key areas represented in the [Oregon English Language Arts and Literacy Reading Foundational Skills Standards](#) for students in grades K–5.<sup>238</sup>

230 Paris & Alim, 2017

231 [ODE, 2018c](#)

232 [Dyslexia-Related Training: Definitions, 2018](#)

233 [HB 3499, 2015](#)

234 [Dyslexia-Related Training: Definitions, 2018](#)

235 ODE defines evidence-based in a range of ways given the complex bodies of work across the K-12 system.

236 Dawson & Guare, 2018; Diamond, 2012; Duke & Cartwright, 2021; Johann & Karbach, 2019

237 [Dyslexia-Related Training: Definitions, 2018](#); [ODE, 2018c](#)

238 [Dyslexia-Related Training: Definitions, 2018](#)

- **FLUENCY:** reading text accurately and with sufficient pace, so that deep comprehension is possible. One of the Five Pillars of Reading.<sup>239</sup>
- **FOCAL GROUP:** aligned with [Student Success Act](#): “students of color; students experiencing disabilities; emerging bilingual students; and students navigating poverty, homelessness, and foster care; and other students who have historically experienced disparities in our schools.”<sup>240</sup>
- **FOUNDATIONAL SKILLS:** print concepts, phonological awareness, phonics and word recognition, and fluency. For a deeper dive around Foundational Skills Key Concepts and Terms, reference Achieve the Core’s: [Reading Foundational Skills Key Concepts and Terms](#).
- **FUNDS OF KNOWLEDGE:** bodies of information developed within historical and cultural contexts that provide individuals and households the knowledge they need to maintain their well-being.<sup>241</sup>
- **GRAPHEME:** the smallest unit of sound within our language system. A phoneme combines with other phonemes to make words.<sup>242</sup>
- **PHONEME–GRAPHEME CORRESPONDENCE:** matching of a spoken sound (phoneme) to its corresponding letter or group of letters (grapheme).<sup>243</sup>
- **HIGH-QUALITY INSTRUCTIONAL MATERIALS:** instructional materials that include specific learning goals and lessons aligned to content standards, student-centered approaches to inquiry-based learning, research-based teaching strategies, teacher support materials, and embedded formative assessments to effectively help teachers implement instructional units and courses that are integrated, coherent, and sequenced.<sup>244</sup>
- **INCLUSIVE TEACHING:** any number of teaching approaches that address the needs of students with a variety of backgrounds, learning modalities, and abilities. These strategies contribute to an overall inclusive learning environment in which all students perceive to be valued and able to succeed.<sup>245</sup>
- **LINGUISTICALLY RESPONSIVE INSTRUCTION:** teaching practices that support the learning, development, and engagement of children from diverse linguistic backgrounds. It includes support for continued development of children’s home or tribal languages by authentically incorporating children’s languages into the learning environment.<sup>246</sup>
- **LITERACY:** identifying, understanding, interpreting, creating, computing, and communicating using visual, audible, and digital materials across disciplines and in any context. It includes reading and writing, and also thinking, listening, and speaking.<sup>247</sup>
- **MORPHOLOGY:** the knowledge of meaningful word parts in a language, including prefixes, suffixes, and/or root words. Knowledge of word structure and how words are formed is linked to both greater vocabulary development and stronger reading comprehension. Research has shown that in children as young as first grade, knowledge of word parts has influenced their literacy development.<sup>248</sup>
- **MORPHOLOGICAL AWARENESS:** knowledge of the parts of words, such as prefixes, suffixes, and root words. Instruction in morphology is suggested to be an important complement to instruction in phonics and phonological awareness.<sup>249</sup>

239 [National Reading Panel, n.d.](#)

240 [ODE, n.d.-a](#)

241 Moll et al., 1992; [Nguyen & Commins, 2020](#); Velez-Ibanez & Greenberg, 1992

242 [University of Florida Literacy Institute, n.d.](#)

243 [University of Florida Literacy Institute, n.d.](#)

244 [ODE, 2022b](#)

245 [Center for Teaching Innovation, n.d.](#)

246 [Early Childhood Learning Center, 2019](#)

247 [International Literacy Association, n.d.](#)

248 [Foorman et al., 2016](#); [DESE, 2023b](#); Prince, 2010; Wolter & Green, 2013; Wolter et al., 2009

249 [DyslexiaHelp, n.d.](#)

- **MULTILINGUAL LEARNER:** a student who, by reason of foreign birth or ancestry, speaks or understands languages other than English, speaks or understands little or no English, and/or requires support in order to become proficient in English.<sup>250</sup>
- **ORTHOGRAPHY:** a language’s conventional spelling system.
- **ORTHOGRAPHIC MAPPING:** a process that involves the brain making connections between phonemes (sounds) and graphemes (spelling): this is what an emerging reader is doing when they confront a new word. Orthographic mapping is the process of forming connections between graphemes and phonemes, in order to store memories of spelling bonded to the pronunciation of words. Orthographic mapping is what allows readers to automatically comprehend what they are reading, so they can focus on content and meaning. Once words are “mapped” into the reader’s memory, there is no longer need for decoding letter by letter or grapheme by grapheme. Foundational reading instruction that assists learners in successfully decoding and mapping words can build a lifetime of reading success.<sup>251</sup>
- **PHONEMES:** a letter or letter combination that spells a phoneme; can be one, two, three, or four letters in English (e.g., e, ei, igh, eigh).<sup>252</sup>
- **PHONICS:** the associations between sounds and print. One of the Five Pillars of Reading.<sup>253</sup>
- **PHONOLOGICAL AWARENESS:** sensitivity to, or awareness of, the sound structure of words. One of the Five Pillars of Reading.<sup>254</sup>
- **PRAGMATICS:** In linguistics (the study of language) pragmatics is a specialized branch of study, focusing on the relationship between natural language and users of that language.<sup>255</sup>
- **RESEARCH-BASED LITERACY PRACTICES:** refers to models, theories, and practices that are based on the best research available in the particular field of study. These practices differ from evidence-based in that they have not been researched in a controlled setting to measure for efficacy.
- **SCIENCE OF READING:** neurological and cognitive science studies of how brains process written words,<sup>256</sup> and includes a broad collection of research from multiple fields of study including cognitive science, learning sciences, literacy research, and instructional science and research broadly.<sup>257</sup>
- **SEMANTICS:** the meaning and interpretation of words, signs, and sentence structure.
- **SOCIAL EMOTIONAL LEARNING (SEL):** the process through which children and adults learn to pay attention to their thoughts and emotions, develop an awareness and understanding of the experience of others, cultivate compassion and kindness, learn to build and maintain healthy relationships, and make positive, prosocial decisions that allow them to set and achieve their positive goals.<sup>258</sup>
- **SYNTAX** The branch of grammar dealing with the way in which linguistic elements (such as words) are put together to form constituents (such as phrases or clauses).<sup>259</sup>
- **SYSTEMATIC INSTRUCTION:** a carefully planned sequence of instruction with lessons that build on previously taught information, from simple to complex.<sup>260</sup> Systematic instruction builds on scaffolding as student knowledge grows.<sup>261</sup>

250 [NYSED, 2019](#)

251 [Ehri, 2022](#)

252 [University of Florida Literacy Institute, n.d.](#)

253 [National Reading Panel, n.d.](#)

254 [National Reading Panel, n.d.](#)

255 [MasterClass, 2021](#)

256 [Shanahan, 2021](#)

257 [National Center on Improving Literacy, 2022](#)

258 [ODE, n.d.-a](#)

259 [Merriam-Webster, \(n.d.\), Definition 1](#)

260 [Dyslexia-Related Training: Definitions, 2018; ODE, 2018c](#)

261 [The Meadows Center for Preventing Educational Risk, 2020](#)

- **TARGETED UNIVERSALISM:** setting universal aims that are pursued by universal and targeted processes to achieve those aims.<sup>262</sup> Applying Targeted Universalism provides an operational pathway to lead for educational change in a way that bridges relationships and perspectives while maintaining dedicated and precise attention on focal students and their families.<sup>263</sup>
- **TIME IMMEMORIAL:** a point of time in the past that was so long ago that people have no knowledge or memory of it.
- **TRANSLANGUAGING:** “the discourse practices of bilinguals, as well as to pedagogical practices that use the entire complex linguistic repertoire of bilingual students flexibly in order to teach rigorous content and develop language practices for academic use.”<sup>264</sup>
- **UNIVERSAL DESIGN FOR LEARNING (UDL):** a framework to improve and optimize teaching and learning for all people based on scientific insights into how humans learn.<sup>265</sup> UDL provides a research-based framework for teachers to incorporate flexible materials, techniques, and strategies for delivering instruction and for students to demonstrate their knowledge in a variety of ways.<sup>266</sup> Teaching materials and methods are the focus of change, instead of placing the burden on students to adapt to the curriculum.<sup>267</sup>
- **VOCABULARY:** The part of semantics concerning word meanings and word relations.. One of the Five Pillars of Reading.<sup>268</sup>
- **WELL-ROUNDED EDUCATION:** an education that includes the arts, humanities, sciences, social sciences, language arts, and math. Background knowledge in these subjects allows students to transfer the ability to read into other subjects and experiences that require them to make meaning of what they read. Therefore, a content-rich curriculum is not just a necessary building block for educational attainment but for comprehension beyond the classroom.<sup>269</sup>

262 [ODE, 2022c](#)

263 [ODE, 2022c](#)

264 [Marrero-Colón, 2021](#)

265 [CAST, 2022](#)

266 [The IRIS Center, 2009](#)

267 [CAST, 2013](#)

268 [National Reading Panel, n.d.](#)

269 [Jimenez & Sargrad, 2018](#)

# Appendix D: Reading Research & References

Appendix D contains sources cited within Oregon’s Early Literacy Framework, as well as sources that inform our work more broadly.

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OREGON  
DEPARTMENT OF  
**EDUCATION**

**RESPONSIBLE STEWARDSHIP  
AND STUDENT SUCCESS:  
PPS HEADQUARTERS RELOCATION  
OPPORTUNITY**



**ALB  
INA**

# THIS GROUND IS SPECIAL

## COMMUNITY

Albina was home to 80% of Portland's Black population. Lower Albina used to be a creative, affordable and safe neighborhood, with world class public education models established for and by Black Portlanders.

## DISPLACEMENT

Racist urban renewal policies displaced families and forced them to leave their stable and abundant community. The PEC was established through these same tools, on this same land.

## FUTURE THINKING

The Albina Vision Trust (AVT) is building a nationally precedent-setting, restorative community that centers the re-rooting of Black people, families and culture in Lower Albina.



# A CHILD-CENTERED COMMUNITY





## PPS' FINANCIAL FUTURE IS INSECURE

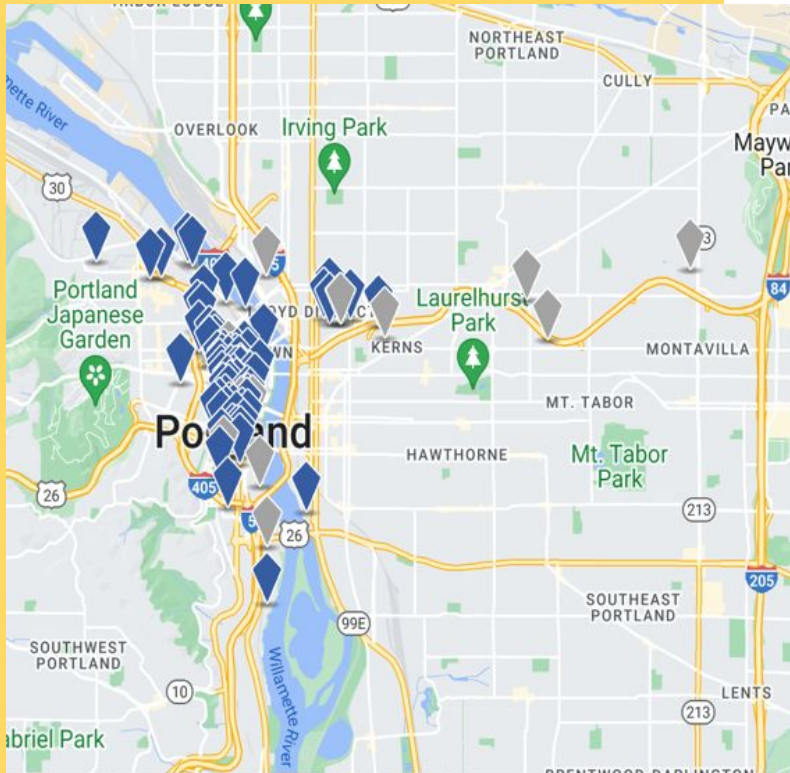
- Rising Deferred Maintenance
- Capital Improvements
- Seismic Upgrades
- Expensive to Operate

### CAPITAL COST RISK TO PPS:

**MINIMUM = \$14M IN DEFERRED MAINTENANCE**

**MAXIMUM = \$81 MILLION IF SEISMIC UPGRADES TRIGGERED**





There are 82 office buildings in Portland greater than 125,000 square feet

## UNIQUE REAL ESTATE MARKET... THE MOMENT IS NOW

### DECREASED MARKET PRICES

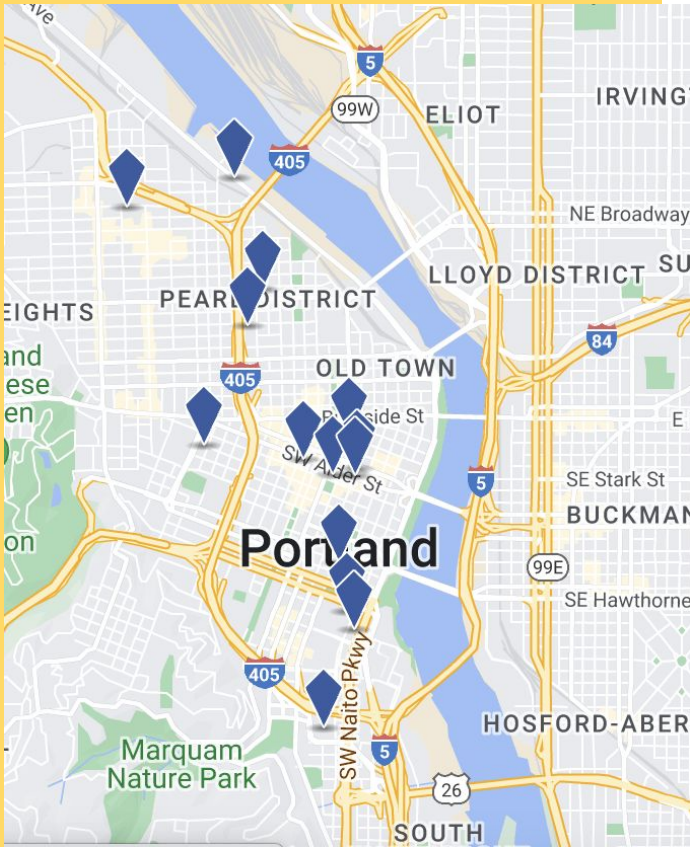
High interest rates for debt financing and high vacancy rates for commercial office buildings downtown have created **deep discounts** on acquisition price upwards of 30%-75% compared to previous valuations

### UNIQUE MARKET CONDITIONS

The number of suitable buildings is likely to grow in the near term as office vacancy rates continue to rise, particularly in the Downtown. While office valuations are down, this has not decreased leasing rates. This market opportunity is centered on acquisition and owner occupancy

### SHORT WINDOW

There is a short window for the acquisition of an existing, high-quality office building with high vacancy rates as interest rates and market sentiment could change, closing window of opportunity



14 potentially suitable office buildings

## IS DOWNTOWN THE ONLY OPTION?

- 82 Office buildings in Portland > 125,000 SF
  - ◆ Eastside: 10 total, 3 in Gateway
    - 5 are hospitals/government buildings
    - 2 are too big (>250k SF)
    - 3 strong occupancy/no availability
      - **0 Potential Options**
  - ◆ Westside: 72 total
    - 37 too big (224k - 850k SF)
    - 2 nearly brand new/expensive (built 2018 and 2020)
    - 19 strong occupancy/no availability
      - **14 Potential Options**
- Further Study: Due Diligence

# ALBINA VISION TRUST PROPOSES:

AVT and PPS form a **public-private partnership** where each party contributes their respective strengths and resources to achieve common goals.

AVT would provide PPS a **cost-neutral** relocation and facilitate the District's acquisition of a **high-quality**, downtown office building in exchange for the transferred ownership of the PEC to AVT.

Transfer will be **at or above market value of PEC site**.



# AVT PROPOSAL VS ALTERNATIVE OPTIONS: STATUS QUO IS NOT ZERO

The AVT proposal allows for a cost-neutral solution to PPS. Creates between \$14M and \$81M in savings to PPS compared to staying in place, and \$220M in savings vs. a full renovation.

PPS Options	A. Stay-in-Place at PEC (Minimum Deferred Maintenance)*	B. Stay-in-Place at PEC (Maximum Likely Seismic Costs)**	C. Fully Renovate PEC***	Partnership with AVT
Total Net Capital Cost to PPS (Net of PEC Sales Proceeds)	<b>-\$14M</b>	<b>-\$81M</b>	<b>-\$220M</b>	<b>\$0</b>

\*From Phase 1 Study. Minimum cost is *only* deferred maintenance and essential capital upgrades, excludes any seismic upgrades, and has not been escalated since its 2019 date.

\*\* Deferred maintenance and capital upgrades from Phase 1 Study (2019 budget) plus current seismic estimate from similar comps.

\*\*\*From Phase 2 Study.

# AVT PROPOSAL VS ALTERNATIVE OPTIONS

The AVT proposal allows for a cost-neutral solution to PPS to be able to relocate.

PPS Options	D. Construct New Facility Offsite*	E. Acquire Exchange Building*	F. Lease Alternative: Liberty Center (Includes NPV of Rent Paid)**	Partnership with AVT
Total Net Capital Cost to PPS (Net of PEC Sales Proceeds)	<b>-\$123M</b>	<b>-\$35M</b>	<b>-\$101M</b>	<b>\$0</b>

\*From Phase 2 Study. Only considers administrative office relocation costs (removes warehouse cost).

\*\*Lease Alternative from Phase 2 Study. When annual rent is accounted for (Yr 1=\$4.6M, increasing at 3%), the Net Present Value of rent paid over 99 years greatly increases the Net Cost to PPS resulting in a cost of -\$101M. Additionally, PPS would not own an asset unlike all other scenarios which makes this more unattractive. Also removes warehouse cost.

Only  
cost-neutral  
outcome for  
PPS

Over 1,000  
units of  
central city  
housing

Healing  
historic  
harms

New HQ with  
greater  
walkability &  
accessibility

# BENEFITS OF RELOCATING PEC

Oregon's first  
climate-positive  
and  
child-centered  
district

Stabilizes  
enrollment,  
maximizes  
current PPS  
investments

Freeing PPS  
from  
long-term  
liability



# BENEFITS OF AVT PARTNERSHIP

1. **Certainty of Close:** Broadway Corridor has a second private developer after the first backed out which means time and money is wasted.
  2. **Flexibility:** Greater flexibility in leaseback/move-out timeline in partnership with AVT versus a private market sale.
  3. **Transaction Sequencing:** The transaction sequencing with a private market buyer would likely be infeasible.
  4. **Acquisition Support:** Partnership with AVT allows for additional support and resources in the acquisition of new office space as well as the resolution of County warehouse space.
  5. **Downtown Office Asset Appreciation and Long-term Growth:** PPS would likely see significant appreciation to a downtown office asset over a mid-term horizon based on the discounted acquisition price.
-

# THE TIME IS NOW



- Real estate market could have a short window

<b>Cost of Waiting</b>	<b>Now</b>	<b>Later (Strong Market)</b>
Cost of Relocation	-\$	-\$\$\$
Value of Land	\$	\$
<b>Net Relocation Cost To PPS</b>	-	-\$

- PPS commitment to relocation is necessary to catalyze public and private capital for 1,000+ units of housing
- PPS needs to demonstrate sound fiscal leadership, particularly as voters weigh future bond proposals

# PROPOSED NEXT STEPS:

Feb 2024 - PPS Board  
passes resolution to  
prepare for sale of PEC

Enter into Purchase  
Agreements for new  
Headquarters and PEC

PPS Relocation to  
new Headquarters



30 days to  
establish  
AVT/PPS  
Work Plan.

6-9 month  
Identification Period  
(Identity and commit  
to new HQ site and  
warehouse)

Due Diligence, Acquisition, TI  
Design and Buildout Period  
before PPS Relocation

An aerial night view of a modern city skyline. The buildings are illuminated with warm lights, and a large bridge with a red truss structure spans across a river in the foreground. The sky is dark with some clouds, and the overall atmosphere is one of a vibrant, modern urban environment.

**RECLAIM HOME. REBUILD WEALTH.**

**ALB  
INA**



# RESPONSIBLE STEWARDSHIP AND STUDENT SUCCESS: PPS HEADQUARTERS RELOCATION OPPORTUNITY

## EXECUTIVE SUMMARY:

Current real estate conditions give Portland Public Schools (PPS) a path for the cost-neutral relocation of the Dr. Matthew Prophet Education Center (PEC) in partnership with the Albina Vision Trust (AVT). This opportunity is the only option, identified through 5-years of site study, that does not trigger significant cost to PPS. Relocation mitigates PPS financial risk around deferred PEC capital costs and unlocks the restorative redevelopment of Lower Albina.

The benefits of relocation include:

- 1) Market Opportunity:** Leveraging current real estate market conditions to A) realize the only cost-neutral relocation outcome available to PPS and B) acquire a valuable asset in downtown Portland with long-term growth potential.
- 2) Fiscal Responsibility:** Freeing PPS from the long-term liability and excess cost associated with maintaining an aging, ill-suited and oversized facility.
- 3) Racial and Economic Justice:** Taking a significant step towards healing historic harms inflicted upon Black Portlanders.
- 4) Housing Working-Class Portlanders:** Catalyzing a precedent-setting project that will create over 1,000 units of housing for over 3,000 working-class Portlanders.
- 5) Accessible, Walkable Headquarters:** Creating a more walkable, central PPS headquarters with greater accessibility via public transit, vehicle, and bike for staff and the public.
- 6) Strengthen & Stabilize Enrollment:** Stabilizing enrollment at Jefferson High School, Tubman Middle School and Boise-Eliot Elementary School to maximize current investments, securing general fund allocation for PPS' most historically neglected schools.
- 7) Environmental Sustainability:** Clearing the way for the development of Oregon's first climate-positive (carbon-negative), child-centered district in the heart of Lower Albina.

## THE CONTEXT:

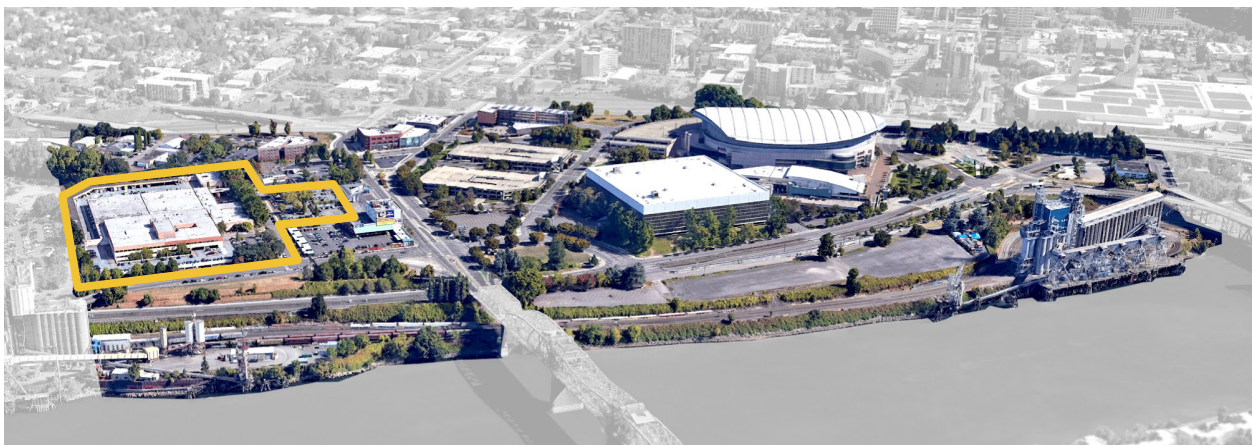
### This Ground is Special

For several years, the Albina Vision Trust (AVT) has been envisioning a new kind of community in Portland's Lower Albina. We are leading America's largest restorative redevelopment effort, one that centers the re-rooting of Black people, families, and culture in the economic heart of our city. That work includes making sure that we are reflected in the built environment and that we participate in the wealth generated by our presence as owners of our homes and businesses.

#### *The story of Albina is the story of urban America.*

Historically, Albina was home to 80% of Portland's Black population. During the 1950s and 1960s, racist urban renewal policies displaced families from the area. Albina was classified "blighted" and redlined, with properties condemned for cents on the dollar. City and State bureaucrats demolished thousands of homes to build Interstate 5, Veterans Memorial Coliseum, and the sprawling, 10.5-acre Portland Public Schools (PPS) headquarters facility, now known as the Dr. Matthew Prophet Education Center (PEC).

This ground is special. As shown below, the PEC sits in the center of Lower Albina, 94-acres of central city real estate situated along the banks of the Willamette River. The PEC site, and Lower Albina as a whole, offer the unique ability to develop at-scale without displacing, disrupting, or uprooting existing residents. In 2021, AVT was successful in acquiring the right of first offer/refusal on the PEC.



Situating our work in context means understanding the role that **Portland Public Schools** has historically played in **the destruction of Black families** here in Lower Albina. It also means understanding that the way forward must be firmly rooted in the principles of racial and economic justice.

### PEC Financial Burden: Capital and Operating

PPS conducted two studies on the PEC site over the last five years: 1) The BESC Future Initiative Phase 1 Report (2019) and 2) The Prophet Center Future Initiative Phase 2 Report (2022). These reports studied the PEC site value, determined PPS' space and occupancy requirements, and analyzed relocation, consolidation, and redevelopment options for the PPS headquarters. The reports concluded that no option studied, including staying in-place, was cost neutral to PPS.

Per the Phase 2 Report, the PEC’s rising deferred maintenance will eventually force PPS to address major systems failure and structural issues at the facility. These necessary updates may trigger costly seismic upgrades, resulting in an **expensive capital project** for PPS.

The Phase 1 Report estimates the **basic maintenance and capital improvement** costs for PPS to stay on-site at **\$14.1M** (as of 2019), before any seismic improvements. While the exact capital costs and timeframe for triggered seismic upgrades is unknown, the scale of the costs will be significant and could require urgent action. A full seismic retrofit of the PEC would require an additional \$65.7M according to cost analysis in the Phase 2 Report. This, along with rising deferred maintenance, is an **unfunded liability** and presents **financial risk to PPS**.

The cost to **maintain operations** at the PEC is also **significant**. Over a 15-year term, operating expenses alone are estimated to be \$26.8M versus \$16.8M for a renovated office building according to the Phase 1 Report. This means PPS is paying 60% or \$10M more to operate the PEC than they would for another office building.

## Unique Real Estate Market

There is a short window for the acquisition of an existing, high-quality office building in downtown Portland at a **significant discount**. This discount is based on distress in the Portland office real estate market, concentrated in downtown, due primarily to high interest rates for debt financing and high vacancy rates for commercial office buildings. While these factors constrain development, and depress land values, they create a unique opportunity for office acquisition by an owner-occupier. These discounts on acquisition price can be significant, upwards of 30%–75%.

## THE OPPORTUNITY:

As showcased above, the cost for PPS to stay in the PEC is significant. PPS has a **short window** of time to leverage current market dynamics and explore a cost-neutral relocation option in partnership with the Albina Vision Trust (AVT).

In this opportunity, AVT would facilitate the acquisition of a high-quality office building in downtown Portland in exchange for the transferred ownership of the PEC to AVT. This strategic partnership is the only relocation option, identified in 5-years of site study, that does not result in significant cost to the PPS. The exchange of property would **meet or exceed the fair market value** for the PEC site.

The table below shows the financial analysis, completed in the Phase 2 Report, of the most financially feasible options for PPS relocation. The table compares the following scenarios: A) Staying-in-Place; B) Renovating the PEC to meet PPS needs; C) Ground-up development on a new facility; D) Market-rate sale of the PEC and acquisition of an existing building; E) Long-term lease at the Liberty Center; and F) AVT’s proposition to acquire an existing building in exchange for the PEC Site. This comprehensive analysis is designed to shed light on the financial landscape and identify the most advantageous course of action for PPS.

	A. Stay-in-Place at PEC (Minimum Deferred Maintenance)	B. Renovate PEC	C. Construct New Facility Offsite	D. Sell at Market Value/Acquire Existing Building	E. Lease Alt: Liberty Center	F. Partnership with AVT
PPS Options	PPS Phase 1 Study	PPS Phase 2 Study				
Total Net Capital Cost to PPS (Net of PEC Sales Proceeds)	<b>-\$14.1M</b>	<b>-\$220M</b>	<b>-\$166M</b>	<b>-\$77M</b>	<b>-\$8.7M</b>	<b>\$0</b>

AVT’s proposal is the sole cost-neutral option. Option A, one of the lower cost options, is infeasible long-term given the increasing deferred maintenance and risk for costly seismic upgrades. Option D, a private-market sale, was \$78M more costly to PPS than the AVT partnership when studied in the 2022 Phase 2 Report. Option

E, the long-term lease, has the lowest upfront capital cost of the options studied. However, the Phase 2 report reviewed whether it was more financially prudent for PPS to own or lease new office over a 20-year term and this analysis determined that the net present value of the leasing costs was \$6M greater than the net present value of the costs to acquire and hold an office building (Option D).

Embracing AVT's partnership is a responsible move in real estate and budget management for PPS, showcasing a commitment to financial stewardship and bolstering public confidence in the decision-making process.

## Value Creation for PPS: Private Market Sale vs. AVT Partnership

The market value of real estate is not fixed and varies based on market conditions. The highest site value for the PEC is in the land as a redevelopment opportunity. For a new development to be financially feasible, the development costs (i.e. land acquisition, design, permitting, construction, etc.) cannot exceed the total development value. This means that the PEC site value and appreciation is limited by the total development value.

Given current real estate conditions, there are limited-to-no alternative buyers for the PEC site. New commercial development is largely infeasible due to high construction costs, high interest rates, and the limited availability of debt and equity financing. Based on these market conditions, it is highly unlikely that PPS would be able to transact with a private market buyer at a price and on a timeline that would allow for the cost-neutral relocation of PPS headquarters.

Waiting for the market to return and a future buyer would similarly fail to create value for PPS. A top-of-market sales price tracks with top-of-market acquisition and relocation costs, as evidenced by a previous site offer. In 2019, PPS received an unsolicited site offer of ~\$80M. This offer had a low likelihood of closing and/or transacting near the offer price. However, even if the offer had closed at that price, PPS' review of relocation options at the time found that this offer did not cover the required acquisition and relocation costs. The deficit between PEC sales price and the cost of relocation for a market transaction was also confirmed in the 2022 Phase 2 study.

Based on analysis created through 5-years of site study, the AVT transaction is the optimal path for value creation for PPS compared to a transaction with a private market buyer.

## Additional Benefits to AVT Transaction

AVT's proposal also offers additional transaction-related benefits outlined below:

1. **Certainty of Close:** Broadway Corridor has a 2nd private developer after the 1st backed out which means time and money is wasted.
2. **Flexibility:** Greater flexibility in leaseback/move-out timeline in partnership with AVT versus a private market sale.
3. **Transaction Sequencing:** The transaction sequencing (aligning the acquisition of new office space and the sale of the PEC site) with a private market buyer would likely be infeasible.
4. **Acquisition Support:** Partnership with AVT allows for additional support and resources in the acquisition of new office space as well as the resolution of County warehouse space issues.
5. **Downtown Office Asset Appreciation and Long-term Growth:** PPS would likely see significant appreciation to a downtown office asset over a mid-term horizon as the downtown market returns, based on the discounted acquisition price.

Finally, and of utmost significance for the community, the City and the State, AVT's partnership brings significant social and community benefits unmatched by any other development scenario, with direct benefits to PPS, as well as Portland students and families. Full impacts are detailed in the following section.

## THE IMPACT:

PPS can clear the way for a nationally precedent-setting, child-centered redevelopment effort and reactivate the communal fabric of Lower Albina.

Relocating the PEC would enable the development of **over 1,000 units of child-centered housing, an education hub**, mixed-use commercial opportunity, and abundant communal green space in the heart of our central city.

The urgency of the current moment cannot be overstated:

1. **Market Opportunity:** Current conditions for office space downtown mean that relocation is cheaper than it will ever be due to historically high interest rates. PPS has the opportunity to acquire a fully outfitted, virtually turnkey-ready headquarters building for **pennies on the dollar**, creating a once-in-a-generation purchasing opportunity while also contributing to the long-term rebuilding of community wealth.
2. **Fiscal Responsibility:** The Prophet Education Center is a long-term financial liability for PPS. The site is undevelopable in its current form and further site investments will not translate to value at sale, leaving PPS with a building that is oversized, under-utilized and costly to maintain. Long-term, this will create additional burden on the general fund and/or future bonds, which should prioritize modernizing neighborhood schools.
3. **Housing Working-Class Portlanders:** The site represents a large-scale development opportunity capable of bringing affordable, family-centered housing to the central city. The Prophet Education Center occupies 10 acres of prime central city land that could otherwise **house 3,000 working-class residents**, therefore addressing Portland's housing crisis at scale.
4. **Central, Accessible, Walkable Headquarters:** A downtown office location offers significantly improved accessibility by multi-modal transportation, particularly via public transit from all corners of PPS.
5. **Strengthen & Stabilize Enrollment:** Portland Public Schools is investing nearly half a billion dollars into Albina through the modernization of Jefferson High School, the relocation/rebuilding of Harriet Tubman Middle School and the creation of the Center for Black Student Excellence. Ensuring there is adequate, affordable housing for thousands of families through the redevelopment of the Prophet Education Center is a key part of the strategy to **stabilize enrollment at neighborhood schools**.
6. **Environmental Sustainability:** Portlanders living adjacent to interstate highway systems have a higher incidence of asthma and worse overall health outcomes than their more advantageously situated neighbors. We cannot talk about economic and racial justice without simultaneously centering environmental justice. The Prophet Education Center can serve as a pilot zone to develop **Oregon's first climate-positive (carbon-negative) district**. The scale of the development offers a unique opportunity to both improve life outcomes for our most marginalized central city residents and reposition Portland as a national leader in environmentally conscious urban planning, design and construction practices.

The relocation of PPS headquarters is not at all about PPS. It's about clearing the way so that Portland's Black community can finally begin working towards making itself whole.

The Albina Vision Trust is proud to stand alongside PPS in advancing this generational effort to ensure a permanent, equitable and accessible home for Black and under-represented Portlanders in the heart of our city. Together, we can leverage policy to move historically displaced residents back into Albina affordably and create a vibrant and intentionally designed ecosystem geared around providing marginalized community members with legitimate generational mobility and opportunity from cradle to grave.



PORTLAND  
Public Schools

**Date:** January 11, 2024

**To:** PPS Board of Education

**From:** Lisa Merrick, Legislative Liaison

**Subject:** Recommended Legislative Priorities for the 2024 Session

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## BACKGROUND

The Legislature will convene for the 2024 short session from February 5 to March 10. Only lasting 35 days, short sessions are designed to handle emergencies and to rebalance state budgets, which are adopted during longer sessions that occur during odd-numbered years. Given the short timeframe, short sessions are not well suited to manage complex policy bills.

## KEY SESSION DATES

**November 9, 2023:** Deadline to introduce Legislative Measures

**January 10-12, 2024:** January Legislative Days (informational sessions held at the Capitol)

**February 5, 2024:** Legislative Session begins

**February 7, 2024:** Quarterly Revenue Forecast

**March 10, 2024:** Legislature adjourns

## 2024 LEGISLATIVE SESSION PREVIEW

During the upcoming legislative session, the Legislature is positioned to address some significant issues including potential changes to Measure 110, housing production, wildfire relief, and winter road maintenance.

Given the recent PPS strike, the Legislature will also begin having conversations on education funding, specifically around the Quality Education Model. Conversations about broader structural changes to the State School Fund and Oregon's education funding system are

expected to take place over the interim period leading up to the 2025 long session through workgroups convened by Governor Kotek's office.

Governor Kotek has called on the Legislature to approve a \$600 million investment on housing and homelessness next year, which will cover housing production and rental assistance costs. She is also seeking funding for the Employment Related Day Care program as well as \$50 million in one-time funding for summer learning programs.

## **PREVIEW OF PROPOSED EDUCATION BILLS**

Below is some high-level information about some of the education bills that are expected to move forward this session. More information about these bills and additional education legislation that is introduced will be provided to Board Directors regularly throughout the session.

- School Board transparency legislation: requires school boards to stream and post recorded meetings and meeting minutes online and allow for remote participation.
- Omnibus Senate Education Committee bill: includes but not limited to Quality Education Model (QEM) changes, merge TSPC and ODE, and technical changes to SB 283 (2023 Education workforce bill).
- Education finance bill: OEA sponsored legislation to make some small changes to the CSL calculation and cap ending school balances at 10%.
- Updates to SB 819 (Abbreviated Day legislation from 2023 session): technical changes brought forward by ODE and Senator Gelser Blouin to improve the bill's implementation.

## **RECOMMENDED LEGISLATIVE PRIORITIES FOR PPS**

- \$50 million in statewide funding for high-quality summer 2024 programs.
- \$6 million in funding for Regional Inclusive Services (RIS) and \$22 million for Early Intervention/Early Childhood Special Education (EI/ECSE).
- Legislation to establish a youth advisory committee, made up of members of each ESD region, at the Department of Education.
- Legislation to require the Oregon Department of Education to update their administrative rules to align with a federal USDA rule expanding the Community Eligibility Provision, this would enable more schools to offer school meals, free of charge, to all students.

Note: Given that PPS is projected to have more time before hitting the statutory limit on its local option levy revenue collection, staff recommends moving forward the local option levy policy forward in the 2025 session, rather than the 2024 session as previously discussed. During the short session, the Government Relations team can coordinate an informational session on the PPS local option levy issue.

### **LEGISLATIVE ENGAGEMENT AND ADVOCACY**

Throughout the session, the Government Relations team will coordinate opportunities for the Board of Education and certain PPS staff members to engage with the Legislature and advocate for PPS's legislative priorities. The legislative engagement and advocacy plan will include a Board of Education lobby day and DSC and PPS student advocacy opportunities.

### **STAFF RECOMMENDATION**

Staff recommends that the Board of Education adopt the Legislative Agenda for the 2024 Session.



## 2024 LEGISLATIVE AGENDA

### Short-Session Funding Priorities

- \$50 million for summer 2024 academic programs
  - Many students are still struggling academically, emotionally, and socially in the pandemic. Additional funding from the state can support PPS in offering summer learning opportunities through our summer acceleration academies and school-community partnerships.
- \$22 million for Early Intervention/Early Childhood Special Education (EI/ECSE) programs
  - These programs provide required services to youth 0-5. Referrals decreased during the pandemic, but with caseloads now increasing, \$22 million is needed to shore up the program.
- \$6 million for Regional Inclusive Services (RIS)
  - Regional Inclusive Services work in collaboration with Local School Districts, Early Intervention, Early Childhood Special Education (EI/ECSE) programs, Families, and Community Agencies to provide specialized educational support for children who experience low-incidence disabilities. An additional investment of \$6 million will ensure that the program is able to provide the level of services and support students need.

### Short-Session Policy Priorities

- Youth Collaborative: PPS supports legislation that will establish a youth advisory committee, made up of members of each ESD region, at the Department of Education in the Senate Omnibus bill.
- Community Eligibility Provision: PPS supports legislation that requires the Oregon Department of Education to adopt administrative rules that align with a recent federal USDA rule expanding the Community Eligibility Provision, which would increase the number of schools that offer school meals, free of charge, to all students.



## **PORTLAND PUBLIC SCHOOLS**

### **OFFICE OF OPERATIONS**

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### **STAFF MEMO**

**Date:** January 18, 2024

**To:** Board of Education

**From:** Dan Jung, Chief Operating Officer

**Subject:** General Obligation Bond Planning

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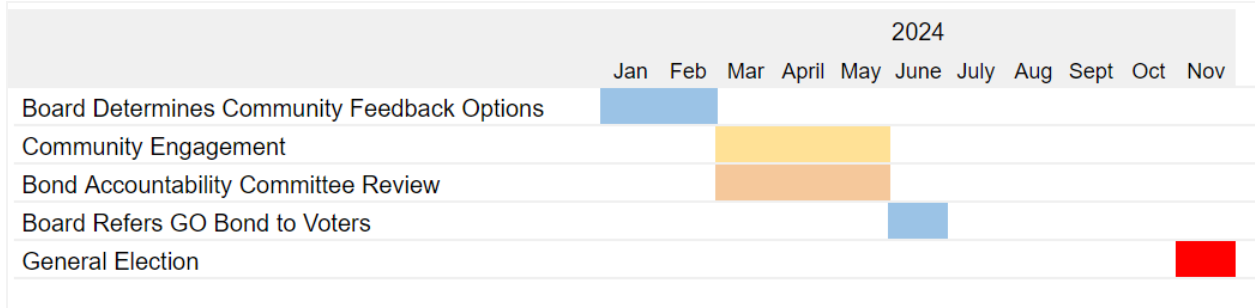
## **Introduction**

The next general obligation bond (GO bond) is anticipated to be presented to voters in November 2024. In order to refer a GO bond package, the District must determine:

1. The amount of the GO bond
2. The financing plan
3. The scope of work

To meet the November 2024 goal, a GO bond referral must be made no later than August. It will be important that these decisions be made quickly to allow time for further scope refinement, review by the Bond Accountability Committee and community input.

Below is a sample GO bond development schedule.



The District has numerous guiding documents that can help inform these decisions as a number of variables need to be considered when making decisions about bond planning, including PPS’s priority capital needs, existing GO bond debt, district and market capacity, future maintenance obligations and more.

The following information is designed to lay groundwork for the building of a future bond package by providing capital scope and financial data to inform the community and Board’s work.

**Note: it may be helpful to answer the bond planning questions in sequential order**

- 1. What is the desired amount of the GO bond?**
- 2. How should the bond be financed?**
- 3. What are the scopes of work that should be included?**

## GO Bond Financing

PPS began its capital improvement program in 2012 guided by a sustainable financing model that prioritized using short-term debt financing. The benefits of short-term debt are largely two-fold:

- (i) total interest is comparatively low; and
- (ii) retiring debt in short-term intervals creates revenue capacity for additional/future bonds

These benefits, in combination, allow the District to pursue a regular series of GO bonds while maintaining a consistent tax levy rate.

The downside of short-term debt is that the bond principal amount is relatively low.<sup>1</sup>

This model was a “pay as you go” plan such that the length of the debt would match the approximate time it took to complete the funded improvements. For example, it assumed that an 8-year bond would take approximately 8 years to complete the majority of the work and the debt would be retired in 8 years. When the work was complete, the debt would be paid off, and the district could repeat the cycle.

<sup>1</sup> The original model estimated the first four GO bonds in the \$350M - \$450M range

The short-term financial model also proposed overlapping bonds to maintain a consistent rate of project completion, and modeled small overlapping 8-year GO bonds that would be voter approved every 4 years. This is where the concept of pursuing a GO bond at every presidential election derived.

Over the course of 3 GO bonds, PPS has moved away from using short-term debt in favor of long-term debt. Long-term debt provides the benefit of larger bond principal amounts, however it also increases the length of the debt term and the interest costs, and does not create the same revenue capacity for the next GO bond in the series.

Currently PPS has bond debt that requires large portions of PPS's tax revenue to pay down. It's important to understand how this debt impacts the District's future GO bond financing options.

### Sample GO Bond Financing Scenarios

The District's financial advisor has provided a number of sample financial scenarios. The scenarios are intended to highlight the dependencies of financial variables and help guide Board decision making.

Variables in the below scenarios are:

1. Approximate Bond Amount (Principal) - the total principal amount of the bond
2. Estimated Total Interest - the total estimated interest payments over the life of the bond
3. Total Revenue Needed - the total amount of taxes needed
4. Approximate Interest as % of Principal - the calculation of the amount of total interest against the principal amount
5. Approximate Length of the Debt - estimation of how long the debt will need to be financed to achieve the principal amount - typically the longer the length of debt, the higher the principal amount and the higher the % of interest - similar to a conventional mortgage
6. Maximum Levy Rate - the estimate tax levy rate per \$1000 of assessed value
7. Timing of Potential Next Bond Election - estimated next time PPS would ask voters to approve a GO bond based on current debt, levy rate, work load, etc.

### Sample Scenarios

Scenario A: Retain the current estimated levy rate maximum<sup>2</sup> and identify the desired length of debt

- Independent Variables: Estimated Levy Rate | Length of Debt
- Dependent Variables: Principal Amount | Interest

Scenario B: Identify the principal bond amount (\$1.5B) and the desired levy rate

- Independent Variables: Principal Amount | Estimated Levy Rate
- Dependent Variables: Interest | Length of Debt

Scenario C: Identify the principal bond amount (\$1.5B) and the desired the length of debt

- Independent Variables: Principal Amount | Length of Debt
- Dependent Variables: Interest | Estimated Levy Rate

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<sup>2</sup> \$2.50 per thousand of taxable assessed value

Scenario D: Retain the levy rate, identify the bond amount (\$1.5B), and the desired the length of debt

- Independent Variables: Estimated Levy Rate | Principal Amount | Length of Debt
- Dependent Variables: Interest

### Sample Scenario Table

	Approx Bond Amount (Principal)	Estimated Total Interest	Total Rev Needed	Approx Interest as % of Principal	Approx Length of Debt	Estimated Levy Rate	Potential Next Bond
A.1	\$450M	\$90M	\$540M	20%	8 years	\$2.50 / 1000 (renewal)	2032
A.2	\$850M	\$250M	\$1.1B	30%	12 years	\$2.50 / 1000 (renewal)	2036
A.3	\$850M	\$325M	\$1.175B	38%	16 years (8 year drop)	\$2.50 / 1000 (renewal)	2032
B.1	\$1.5B	\$575M	\$2.075B	38%	20 years (16 year drop)	\$2.50 / 1000 (renewal)	2040
B.2	\$1.5B	\$250M	\$1.175B	17%	16 years (12 year drop)	\$3.00 / 1000 (\$0.50 increase)	2036
C.1	\$1.5B	\$300M	\$1.8B	20%	8 years	\$4.50 (\$2 increase)	2032
C.2	\$1.5B	\$400M	\$1.9B	26%	12 years	\$3.25 (\$0.75 increase)	2036
D.1	\$1.5B	\$950M	\$2.45B	64%	24 years (8 year drops)	\$2.50 / 1000 (renewal)	2032

Blue = Independent Variable

Note: the District has \$422M remaining to be sold for the 2020 bond authorization. PPS is planning to sell these remaining funds in 2025.

As you will notice, as the principal amount gets larger, the tradeoffs are either (i) increased interest; (ii) increased estimated levy rates; and/or (iii) increased length of time to the next GO bond election, which in turn impacts the options and capacity for the next GO bond in the series.

In other words, larger principal bond amounts have the benefit of including more projects in the GO bond for the next round, however the larger bonds impacts PPS's capacity to continue to request future bonds and maintain a consistent levy rate.

## Guiding Documents

The following documents quantify the District's asset portfolio under a number of different measurements in order to assess investment pace and volume to maintain a defined physical and functional condition.

### Facility Condition Assessment

PPS's Facility Condition Assessment (FCA) - completed in 2021 - documented the condition of the District's building assets.<sup>3</sup> Nearly three-quarters of all assets were categorized as "Aged – Exceeded Design Life." Assets with the highest associated costs were related to heat-generating systems, followed by elevators, lifts, and electrical distribution systems.<sup>4</sup>

The Facility Condition Index (FCI) is the ratio of a building's maintenance costs relative to replacing the building at current construction costs. FCI values range from 0.00 (Good) to 1.00 (Critical). A higher FCI indicates a greater need for remedial funding, relative to the facility's replacement value. The District average FCI is 0.13 or "Poor." Sixty-two (62) facilities rated Poor or Critical of the ninety-four (94) sites assessed, indicating a critical need to invest in existing facilities.

### **Facility Capital Improvement Plan**

The highest return on investment is to replace systems before they reach failure. The APPA (formerly the Association of Physical Plant Administrators) is an organization focused on education facility management; resources and information from the APPA are used for benchmarking investment needs for facilities maintenance and capital renewals.

Current Replacement Value (CRV) is a fundamental component of the APPA-calculated standards; the CRV is derived by multiplying new construction costs per gross square foot (\$/GSF)<sup>5</sup>. The expected lifespan of facilities is derived by averaging the life of a building structure, systems, components, fixtures, and equipment. The percentage in the benchmark refers to the percentage of facilities' CRV that should be invested annually to maintain school buildings in good condition as recommended by the APPA and discussed in the State of Our Schools: America's K–12 Facilities 2016 ("State of our Schools") study which addresses the specific capital planning needs of K-12 facilities<sup>6</sup>.

Benchmark investment calculations use CRV to estimate expected facility costs of ownership. PPS's CRV for the entire facility portfolio was \$4.2 billion in 2021. The APPA benchmark for annual investment into maintenance and refurbishment is 3% of CRV for a ten-year total investment of \$2.4 billion<sup>7</sup>, with an average expenditure of \$171 million per year. This high-level calculator assumes buildings are already in "good" condition, so the number for PPS would, under this planning calculation, be even higher.

Performing preventive maintenance is critical to minimizing asset life cycle costs and extending asset life span.

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<sup>3</sup> Assessments were performed per ASTM E2018 guidelines and based on "rapid visual inspection." Data was collected without intrusion, relocation, removal of materials, exploratory probing, use of specialized protective clothing, or any special equipment and did not necessitate lockout-tag-out procedures.

<sup>4</sup> The FCA is a high-level review of many critical building systems, but it is not a comprehensive building assessment. The FCA includes the critical building systems: exterior enclosure, roofing, plumbing, HVAC, fire protection, and electrical. However the FCA does not include other systems such as seismic or security.

<sup>5</sup> APPA Facilities Terms and Definitions Database, n.d. <http://tnd.appa.org/detail/6988>

<sup>6</sup> Filardo, Mary "State of Our Schools: America's K–12 Facilities 2016" Washington, D.C.: 21st Century School Fund. 2016. <https://eric.ed.gov/?id=ED581630> Web September 2022.

<sup>7</sup> This estimated investment includes both capital costs and non-capital routine maintenance.

**The Facility Condition Assessment and Capital Improvement Plan highlight the importance of investing in existing school buildings.**

### **Long-Range Facilities Plan**

The Long-Range Facilities Plan (LRFP), required by the state, falls within a sequence of steps recommended by the state before capital bond planning. This document relies on the multi-year FCA and enrollment forecasts outlining student population trends for the next fifteen (15) years. Building on these efforts, this plan documents capital forecasts in the context of educational vision, building condition, and building capacity.

The contents of this document are primarily informational. Recommendations, where they exist, were developed in collaboration with District academic program leaders, district stakeholders, and community voice.

This document offers information on all major categories, but does not outline specific project scopes or timelines. Further study is necessary to determine project feasibility within the future budget parameters.

Community voice was central throughout the LRFP development process, and continued dialogue with community members will be essential. The project team sought student input through close coordination with District elementary, middle and high school teachers, and student groups. Affinity groups were organized to enable groups of people to come together around common social identities, including race and cultural backgrounds, fostering a sense of comfort in sharing stories and generating ideas to inform long-range facility planning efforts. These approaches supported inclusive engagement through empowering the voice of historically excluded or tokenized communities in traditional outreach methods.

The Long-Range Facility Plan project team met with District academic leaders from eleven (11) program areas to document programmatic capital priorities. Program representatives were provided with a list of questions before the interviews, allowing them to consult with their colleagues in developing responses. The questions were intended to elevate the District's social justice and racial equity goals in the context of each respective program vision. All questions were inflected based on the specific academic program area. Following the interviews, the project team organized responses into three sections: Program Vision, Facility Constraints, and Capital Forecasts. The capital forecasts were further divided into high, moderate, and low priorities. Each program leader then had the opportunity to review, comment, and edit the text prior to appearing in this Plan.

For reference, below are the high priority capital forecasts provided for each program. It is not anticipated that the next bond will include all of the below work, rather the below scopes are a starting point for further discussion to determine feasibility and priority within budget parameters.

**The below projects are verbatim from the LRFP. They are provided to highlight the priorities identified during the development of the plan in 2021. It is expected that prior to inclusion of any scope in a GO bond, specific scopes of work would be further vetted, updated and refined. In other words, the LRFP is a good place to look for initial priorities, but not final determinations.**

### **Early Childhood Education**

#### High Priority

- ★ Addition of one (1) Pre-k Partner Program to Holladay Annex for 2023/24 school year
- ★ Addition of two (2) Pre-K classrooms to Rosa Parks for 2023/24 School year
- ★ Addition of two (2) pre-k classrooms at Lent and one (1) at MLK Jr. for the 2022-23 school year.
- ★ Addition of two (2) pre-k classrooms on the southwest side. The program director has identified Markham Elementary as a potential location (based on neighborhood demand). Markham is projected to be at 73% utilization during the 2021-22 school year with fairly stable enrollment projected over the next five years. As such, there is sufficient space to convert two existing general classrooms into pre-k classrooms at this location.
- ★ Addition of two (2) pre-k classrooms on the west side. The program director has identified Chapman Elementary as a potential location (based on neighborhood demand). Chapman is projected to be at 70% utilization during the 2021-22 school year; enrollment is projected to increase over the next five years, with an anticipated utilization rate of 74% by 2025-26. Even with the enrollment increase, there appears to be sufficient space to convert two existing general classrooms into pre-k classrooms at this location.
- ★ Addition of at least two (2) pre-k classrooms at an inner southeast elementary school. Marysville K-5, Woodmere K-5, and Arleta K-5 are examples of schools in this area with low utilization and declining enrollment. As such, they might be potential candidates for pre-k classroom placement over the next five (5) years.

### **Elementary Schools**

#### High Priority

- ★ Add or re-purpose space to provide a dedicated family resource center at every elementary school.
- ★ Provide new flexible classroom furnishings and student seating options to allow elementary teachers to easily reconfigure spaces to accommodate a variety of activities.
- ★ Create an outdoor learning area at each elementary school to support STEM instruction and project based learning.

## **Middle Schools**

### High Priority

- ★ Conduct accessibility upgrades to ensure that all middle schools are accessible to students, teachers, and visitors with physical disabilities. This will allow all students to enter the building via the main entry and navigate all essential programming within the building.
- ★ Conduct site improvements at middle school campuses, including the addition of accessible, age-appropriate recreational play equipment and a covered play structure.
- ★ Invest in flexible furnishings (e.g., student seating, desks) that support collaboration and the ability to quickly and easily reconfigure spaces for purposeful grouping, reteaching, and interventions.
- ★ Align the Long-Range Facility Plan and Educational Specifications with the final Middle School Redesign plan, ensuring that middle school facilities support the District's vision for reimagining the middle school experience for PPS students.

## **High Schools**

### High Priority

- ★ Complete modernization projects of remaining high schools.
- ★ Add dedicated space(s) for community programs at each high school.
- ★ Add space(s) to support social emotional health at every high school (e.g. calming room).

## **Athletics**

### High Priority

- ★ Develop Jackson, Marshall, and Whitaker-Adams as athletic hubs.
- ★ Athletic upgrades at four (4) middle schools: Lane, Ockley Green, George, and West Sylvan. Each site should at minimum have a multipurpose turf field with a track, an appropriately sized main gym and an auxiliary gym.
- ★ Access to turf baseball and softball fields for all high schools (e.g., Franklin, Marshall).

## **Career Technical Education**

### High Priority

- ★ Implement interim CTE upgrades at Jefferson, Cleveland, Ida B. Wells-Barnett, and Alliance to increase the usability of career technical spaces until these facilities can be fully modernized.
- ★ Upgrade dust collection systems in all district wood shops to meet latest safety standards.

## **Multiple Pathways to Graduation**

### High Priority

- ★ Identify a location for the Virtual Scholars program, as well as a PPS Virtual School.

- ★ Construction of new MPG building at Benson.

### **Physical Education**

High Priority

- ★ For the nine (9) elementary schools without dedicated gyms, add or re-purpose space for a structured movement room (2,000 SF). Prioritize Title I schools in the order of construction. Currently, of the nine (9) schools without a dedicated gym, two (2) are Title I schools: Boise Eliot K-5 and Vestal K-5. If space for a structured movement area is unavailable, consider a covered play structure even if one already exists.
- ★ Incorporate the recommendations of the PPS All Gender Task Force with regard to locker rooms (once finalized).

### **Playspaces**

High Priority

- ★ Playspace improvements aligned with district standards at all Title I, TSI, and CSI elementary schools.

### **Security Services**

High Priority

- ★ Complete all 2020 bond-funded security projects including installation of new classroom door locks, as well as new or expanded security camera systems and intrusion alarm systems in non-modernized schools.

### **Special Education**

High Priority

- ★ Conduct an analysis to determine enrollment and capacity impacts of fully implementing an inclusion model while accommodating most students with disabilities within their neighborhood schools.
- ★ All buildings must support a continuum of services for students with disabilities
- ★ Evaluate spatial impacts of adopting a SPED inclusion model as part of the PPS Middle School Redesign and/or Educational Specifications processes.
- ★ Add a dedicated sensory motor support room to every PPS school building (where not already present).
- ★ Provide a minimum of one (1) multipurpose SPED focus classroom at every elementary school in the district, equipped with a sink (where possible) as well as a restroom per district Ed Specification.
- ★ SPED focus classroom renovations and/or additions at the middle and high schools to create a dedicated series of multipurpose spaces that can be adapted to serve a range of needs and services per district Ed Specification.

### **Visual & Performing Arts**

High Priority

- ★ One (1) music classroom configured and equipped per current Ed Specifications at every elementary school.
- ★ One (1) visual arts space configured and equipped per current Ed Specifications with a working, properly ventilated kiln at every elementary school.
- ★ Addition of art exhibition space or area at every elementary, middle and high school.
- ★ Black box theater or flexible performance space in every middle school.
- ★ Centralized VAPA storage facility to house art equipment and supplies, consumables, class sets of musical instruments, theater costumes and props, and other items.

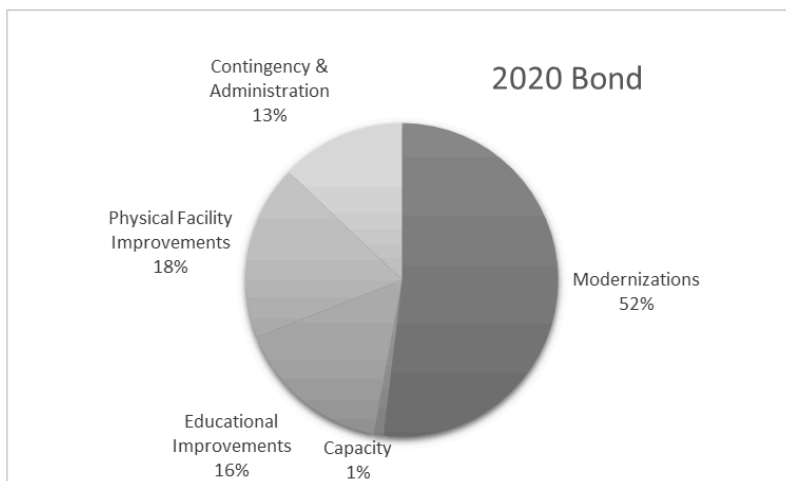
It is important to note that the LRFP does not make commitments that will require future Board action or make specific recommendations for future bonds, and not all of the LRFP priorities can be included in the 2024 bond. Rather these facility priorities provide the foundation for dialogue around bond package development and the District’s vision for the built environment.

**The LRFP includes high-level information on enrollment forecasts and school utilization. Current school utilization rates are approximately 60%, indicating that PPS (at a high-level at least) has adequate existing space for District educational needs.**

## Scope of Bond-Funded Projects

General obligation bonds often consist of a mix of scope and projects. Bonds often include five categories of work:

- Physical Facility Improvements
- Educational Improvements
- Capacity
- Modernization
- Contingency and Administration



## *Physical Facility Improvements*

Physical Facility Improvement often consists of repairing or replacing building systems that are beyond their useful life. Examples include roof replacements, asbestos remediation, accessibility (ADA) improvements, etc. There is not always a bright line between Physical Facility Improvements and Educational Facility Improvements, but one can think of this category as more akin to fixing broken things (such as replacing a leaking roof) or making building system improvements (such as adding an elevator).

### **Critical Systems / Deferred Maintenance**

PPS's Capital Improvement Plan (CIP) is the first step in identifying and prioritizing data-driven capital needs to help guide future investment. FCI, or Facility Condition Index, is a ratio of documented repair costs to facility replacement costs; the most current collective FCI score of District (based on the 2021 FCA) assets is 0.13 or "Poor".

Staff estimates the cost to address all noted FCA deficiencies over a 10-year period would cost \$992 million; about \$100 million per year. Staff estimate that to reduce the FCI from "poor" to "fair" or .074 (the midpoint of FCI "fair" range .05 to .1), over a ten-year period, would require a total investment of approximately \$700 million, or \$70 million per year. These calculations are based solely on the deficiencies identified in the FCA and do not account for additional asset failures or other increases in the deferred maintenance backlog after completion of the FCA.<sup>8</sup>

Additional needs for building maintenance which are not captured in the FCA include exterior improvements such as asphalt repair or renewal and exterior mechanical and site utilities; projects in these areas may include drive aisle replacement, and stormwater system repairs. Schoolyard play equipment replacements, outdoor covered play areas, and turf system refresh work are not captured in the FCA.

Play equipment replacement is anticipated to cost \$37 million over 10 years. Outdoor covered play areas are anticipated to cost \$33 million over ten years. Synthetic turf systems require a surfacing system refresh every eight years which is anticipated to cost approximately \$65 million for the current high school fields; an additional \$65 million is needed for the middle school fields turf refresh over a ten year period once those are implemented.

Seismic system structural work such as improving roof diaphragms and structural supports, as well as building lateral system strengthening are also excluded from the FCA. Current roofing replacement work has included the related seismic retrofit work for that portion of the buildings' structural system. Planning for the remainder of seismic retrofit work is currently underway and includes schools in the City of Portland's Unreinforced Masonry (URM) database, as well as those not addressed through the roofing replacement work. Both mechanical and seismic information is anticipated to be complete in early 2024.

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<sup>8</sup> The deferred maintenance calculations include roof repairs and building mechanical systems. Staff are in the process of completing detailed roof and mechanical assessments which will update these assumptions.

## **Capital Asset Renewal**

As noted above the in the Facility Capital Improvement Plan section, the APPA benchmark for annual investment into maintenance and refurbishment is 3% of CRV for a ten-year total investment of \$2.4 billion<sup>9</sup>, with an average expenditure of \$171 million per year.

## **Seismic**

Although all new and modernized facilities meet seismic code requirements, and a number of PPS sites have received incremental seismic improvements in recent years via roof replacement projects or other targeted improvements, few of PPS current buildings meet current seismic code.

Seismic deficiencies were not a scope within the FCA, however reviewing previous cost estimates places the total cost to bring all PPS sites up to current seismic code at over \$1 billion. In addition to being costly, seismic retrofits are also very invasive, and time consuming; often larger scale projects cannot be completed over a single summer.

2012 Expected Seismic Performance (EPR) Ratings were compiled by James G. Pierson, Inc. Consulting Structural Engineers in spring 2012 and are modeled on the University of California at Berkeley classification system. These classified Portland Public School facilities, by campus, into general groupings to describe their expected performance in an earthquake, using Good, Fair, and Poor. The ratings were used in 2012 bond development and planning as a general seismic guide for expected performance and prioritization. All "Poor" EPR schools in operation during bond planning were scheduled to receive seismic improvements as part of the 2012 school construction bond.

The performance rating system takes into account seismic risk score, previous seismic improvement work, the building class, age of construction, vertical and horizontal irregularities, building site, number of stories and any documented condition of the structural materials. It should be noted that school facilities are often a combination of additions and different building types that have been constructed over many years. Many schools have more than one building class/construction type.

Since the seismic performance ratings were completed in 2012, PPS has passed three bond measures that have provided funds for a range of incremental and full seismic improvements. This work has been focused on school buildings that are on the City of Portland's list of Unreinforced Masonry (URM) buildings. While the presence of a building on the URM list is not a singular predictor of its performance in a seismic event, various code requirements and grant opportunities have been tied to a building's presence on the list. PPS has been using bonds, grants and other funds to bring its URM-listed buildings up to the current seismic code.

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<sup>9</sup> This estimated investment includes both capital costs and non-capital routine maintenance.

PPS is currently working on a complete seismic re-assessment of all District schools, including cost estimates to bring buildings to current seismic code where needed. Additional information will be provided here when the assessment is complete.

### **Accessibility - the PPS ADA Transition Plan**

Title II of the Americans with Disabilities Act (ADA) requirements state that a public entity must reasonably modify its policies, practices, or procedures to avoid discrimination against people with disabilities. Developing a transition plan to remove barriers to program access is a proactive step to ensure PPS's compliance with the ADA. Taken together with Portland Public Schools Racial Educational Equity Policy 2.10.010-P [LINK](#), the PPS ADA Transition Plan [LINK](#) defines scope for barrier removal and multi-level access throughout the District.

The transition plan's primary purpose is to provide an actionable and coordinated work plan for removing architectural barriers across the district's buildings and grounds. Prioritization criteria were developed through a thorough stakeholder engagement and review process which identified the order of importance for barrier removal across the district. The process identified the first priority as main level barrier removal across the district; that work is currently being implemented through the 2020 bond. The second tier of barrier removal will include the installation of elevators at the multi-story schools which have not been modernized, as well as barrier removal in restrooms that are on upper and lower levels of the multi-story schools.

Implementation costs are estimated to range from approximately \$138 million for 29 elevators and related restroom work to \$57 million for those improvements at 12 schools.

### **Security**

PPS takes a layered approach to minimizing risks and creating safe and secure learning environments. This approach includes both adopting new physical security measures and systems, as well as improving capacity of existing measures and systems. Through a system-based approach which includes equipment and technology, site and building design, personnel, policies and procedures, and a comprehensive training program PPS can address the unique circumstances and safety needs of our campuses. [The CYBERSECURITY AND INFRASTRUCTURE SECURITY AGENCY | K-12 SCHOOL SECURITY GUIDE | 3rd Edition](#)

identifies four main layers that schools should consider when planning for physical security measures:

- Ground perimeter layer - the outer boundary of a school campus
- School ground layer - fields, playgrounds, and parking lots
- Building perimeter - walls enclosing the inside of the school building
- Building interior layer - all spaces inside the school building

The following security improvements have been identified for PPS schools: secured vestibules, perimeter fencing, opaque interior and exterior window blinds, and improved surveillance camera coverage.

Secured vestibules provide protection by adding a secured space at the main entrance to a school and slow the entrance of people into the school. To add secured vestibules to 73 schools is anticipated to

cost approximately \$158 million. Focusing improvements on 45 schools will cost approximately \$96 million. In each case, site configuration is unique and the design of the secured vestibule will be adapted in order to provide the preferred entry sequence and control. Ideally, fencing installation can be incorporated into vestibule work to provide a complete perimeter.

Fences provide access control, enable natural surveillance, and regulate foot traffic while establishing a school's perimeter. While fences help to establish the perimeters of school grounds, they have the additional benefit of creating a sense of community and belonging among students. 75,000 lf of fencing around all K-5, K-8 and Middle Schools \$20.2 million; a more consolidated schoolyard layout would incorporate 50,500 linear feet of fencing around 58 campuses at a cost of approximately \$10 million.

Unprotected or uncovered windows that allow for line of sight into a classroom can make classrooms an easy target. If an intruder is unable to see occupants in a room they are less likely to attempt to breach the room to cause harm. Costs to upgrade all schools to have opaque window coverings at both exterior and interior windows is anticipated to be approximately \$25 million; updating only lower level exterior windows to opaque shades would cost approximately \$16 million.

2020 Bond security work is implementing surveillance updates in all schools, however additional camera views are needed and some of the older camera equipment is outdated which impedes clear image rendering. Costs for these improvements include a full update, adding cameras to each non-modernized school for approximately \$10 million; alternatively, adding cameras and adjusting existing equipment in order to ensure full coverage will cost approximately \$6 million.

It is vital to our District's security of our schools that the 2k legacy card readers are upgraded. Some locations are currently using physical keys which get expensive each time the lock needs to be re-keyed when the physical keys are lost. This project would include school-wide card readers, cabling, new panels, as well as the card readers for the server rooms. Not only does upgraded card reader access allow for easy access and re-programming when a new card is needed, it allows the security team to see the historical entrance and exists with a timestamp across the district's schools. In addition, it also allows the school to lock-down access to specific areas of the school by the security department. This project implementation is supported by multiple different departments including OTIS and the physical security team. In addition the implementation would positively impact FAM, and the custodial staff, and on-site school staff. This project would need to be overseen by a project manager and would require approximately 1 year for implementation. This implementation cost would be approximately \$12.6 million.

### **Outdoor Spaces (Schoolyards)**

Across the district there are schoolyards which include a diverse array of features, from covered play structures to playground equipment, gardens, trees, and sports courts. Wear and tear is especially prevalent with play equipment which should generally be on a 20-year replacement cycle. Currently, 74 of the 107 play equipment zones are over 10 years old.

Along with aging equipment, one characteristic shared by the majority of schoolyards across the district is the extensive use of asphalt surfacing. The total asphalt area across the District is approximately 127 acres; asphalt in schoolyards across the district accounts for 44%, or 59 acres, of that total.

Asphalt areas lack the essential tree canopy and vegetation that can offer shade and natural cooling. Currently, schoolyards only have a 10% tree canopy, which is significantly lower than The City of Portland's overall tree canopy goal of 33%. Furthermore, there is a substantial volume of stormwater runoff generated by asphalt covered area; each year district asphalt generates approximately 49 million gallons of runoff that flows into local creeks and drainageways.

District schoolyards are composed of a diverse array of elements, and bond funding can play a crucial role in fulfilling District objectives. To effectively tackle environmental challenges and make a significant community impact, investment would be directed towards fundamental schoolyard components. This targeted allocation will serve as a catalyst for securing future grants and fundraising opportunities to further enhance schoolyards. Fundamental components for investment include:

- Covered Play Structures - 23 of the 59 K-5 and K-8 schoolyards across the district have a covered play area greater than 3,000 square feet. The remaining 35 (61%) schoolyards are in need of a covered play structure.
- Play Equipment Replacement - Incorporating inclusive and ADA-compliant play equipment is a key element of a complete schoolyard. Across the district play equipment has a range of ages. Typically, the safe maintenance of playgrounds requires play equipment to be managed on a twenty-year replacement cycle. Coordinating this life cycle with a ten year investment period, replacement of equipment that is currently ten years or more old is the minimum standard included in the scenarios below.
- Asphalt Replacement - Asphalt surfacing is necessary in some areas of PPS schoolyards to support operations and safe circulation for students as well as vehicles as well as some parts of play areas. Currently the condition of district asphalt is highly variable in quality and condition, with the majority of it being under-engineered for typical uses which in turn creates the need for more repairs.
- Schoolyard Reclamation (asphalt removal, aka “depaving”) - Currently there is an average of 116 square feet of asphalt per student in K-5 and K-8 schoolyards in the district. An extensive examination of national schoolyard standards reveals that numerous districts maintain a standard asphalt area closer to 50 square feet per student. Using this benchmark as a planning goal, PPS could potentially eliminate more than 33 acres, or 56% of the total asphalt area in K-5 and K-8 schoolyards.
- Vision and Planning - Schoolyard projects are unique and require both program level and project level vision planning. The right process provides an opportunity to shape the schoolyard in collaboration with the community in order to direct investment where it is most needed in support of equitable student learning and play.

These elements are combined into “good”, “better”, and “best” scenarios for bond investment within PPS K-5 / K-8 schoolyards and middle school campuses. Following is a summary of improvement scenarios:

Scenario 1: \$103 million

- Construction of all (35) covered play structures
- Replacement of all Title 1A playground equipment older than 5 years and non-Title 1A that is older than 5 years (Total - 30 Title 1A and 52 Non-Title 1A)
- Replacement of 22 acres of asphalt
- Reclamation of 27 acres of schoolyard
- Vision plans for all schoolyards

Scenario 2: \$82 million

- Construction of all (35) covered play structures
- Replacement of all Title 1A playground equipment older than 5 years and non-Title 1A that is older than 10 years (76 total - 30 Title 1A and 46 Non-Title 1A)
- Replacement of 12 acres of asphalt
- Reclamation of 18 acres of schoolyard
- Vision plans for 28 schoolyards

Scenario 3: \$68 million

- Construction of all Title 1A and 8 Non-Title 1A (20) covered play structures
- Replacement of all playground equipment older than 10 years. (72 playgrounds, 26 Title 1A and 46 Non-Title 1A)
- Replacement of 12 acres of asphalt
- Reclamation of 14 acres of schoolyard
- Vision plans for 20 schoolyards

### **Athletics**

Currently, both youth and high school sports regularly practice on non-PPS sites. Even with projected declining enrollment, which was incorporated into the Long Range Facility Plan (LRFP) issued in 2021, the scheduling need for student athletics exceeds PPS field capacity. The LRFP identified three PPS sites, Jackson, Whitaker, and Marshall, as athletic hubs which would support projected program need and relieve scheduling challenges. The LRFP also identified eight middle schools for field and facility improvements which would further reduce scheduling on non-PPS sites.

Implementation of three hubs over ten years would require an investment of \$114,000,000 and implementation of eight middle school facility improvements over ten years would require an investment of \$92,000,000 for a total of \$206,000,000. This approach realizes the full intent for program support identified in the Long Range Facility Plan.

Alternatively, implementation of two hubs over ten years would require an investment of \$76,000,000

and implementation of six middle school facility improvements over ten years would require an investment of \$69,000,000 for a total of \$145,000,000.

Finally, implementation of one hub over ten years would require an investment of \$38,000,000 and implementation of four middle school facility improvements over ten years would require an investment of \$46,000,000 for a total of \$84,000,000.

### **All Gender Restrooms**

In order to improve equity and inclusion at Portland Public Schools, staff identified the need for a pilot project to add all-gender restrooms to schools that do not have them and which also do not have existing single-occupancy restrooms which could be used to support the need on an interim basis. To support this, PPS established an All-Gender Restroom Task Force during the 2020/2021 school year. This group included school-based staff members, central office staff, parents and students, as well as members of the larger LGBTQ2SIA+ communities. The culmination of this work was the Restroom Equity Plan [LINK](#) which was presented to Operations and Student Support during summer 2021.

Options for implementation range from \$15 million to \$2.6 million as follows:

- \$15,000,000 - Staff estimates this amount would support implementation of all gender restrooms District-wide as described in each of the prioritization categories above. The advantage of this option is the implementation would be District-wide and in full alignment with the PPS Restroom Equity Plan.
- \$6,000,000 - Staff estimates this amount would allow the District to implement all gender restrooms in middle schools and K-8s and the locations with zero all gender restrooms.
- \$2,600,000 - Staff estimates this amount would support the implementation of all gender restrooms in the priority locations which currently have zero all gender restroom facilities.

### **Other potential physical facility scopes of work**

- Decarbonization - PPS is currently developing a decarbonization plan that will lead us on a path to improve student and staff health, building efficiency, and campus resilience with the intent of reducing our carbon footprint, operating costs, and disruptions from school days. The PPS Climate Crisis Response, Climate Justice and Sustainable Practices Policy sets PPS on a trajectory to reduce the greenhouse gas emissions of our district's critical infrastructure by 50 percent by 2030, using the 2018-2019 school year baseline, and reach net zero emissions by 2040. Working with a diverse team led by PAE Consulting Engineers, PPS is developing a district-wide decarbonization road map. This road map will help PPS understand how to effectively allocate resources and prioritize projects over the next 20 years by answering the question: "How can PPS most efficiently implement GHG emissions reduction measures to give us the best chance of meeting our emissions goals, given financial, industry, and facility constraints, while considering historic inequities in the distribution of resources across PPS?"

- Emergency Capital - PPS occasionally faces unanticipated emergency circumstances that require immediate response. Funds could be set aside to respond to unplanned instances that are not otherwise included in the bond language.

## *Educational & Technology Improvements*

Educational improvements typically focus on improvements to classrooms and other dedicated learning spaces. The goal of Educational Improvements is to bring dated classroom or teaching instruments up to modern standards.

### **Technology Improvements**

- The ERP system is the backbone of the HR and all financial systems for the district. In Bond 2020 the ERP was earmarked for the planning stages, but did not have enough funding for the full implementation costs. This request includes the additional funding for the purchase and the staff for implementation of that system as well as transitioning the district off of the previous ERP system.
  - ERP Software and 7 PPS Staff for Implementation \$40.5 Million (no inflation costs, but includes 10% contingency)
- Staff and student device refresh: Currently, there are no funds for a district-wide device replacement for students and staff since the original deployment in 2020-2021. We would like to ensure staff and students have up to date technology for usage in classrooms and for homework assignments.
  - Device replacement students and staff with 1 dedicated PM staff overseeing deployment \$65 Million (includes 25% inflation costs and 10% contingency on hardware costs)
- As we know K-12 cyber attacks are unfortunately extremely common across the country and therefore there needs to be updated systems in place to prevent cyber security attacks for our district.
  - Cyber Security Improvement Systems and 1 dedicated PM \$5.5 Million (includes 25% inflation costs and 10% contingency on hardware costs)
- Currently the PPS Data Center is earmarked for end of life in 2025 and will need funds to keep it running. The data center is critical and is the central hub to our infrastructure across the district.
  - Data Center Maintenance (end of life replacement for chiller and UPS) and 1 dedicated PM \$685,900 (includes 25% inflation costs and 10% contingency on hardware costs).
- Bond 2020 did not include scope for replacing classroom tech or infrastructure in any of the Bond 2012 or 2017 schools. The Bond 2012 schools technology is now outdated and will need to be replaced to be inline with the District's tech standards. Although Bond 2017 schools technology is relatively new in comparison to Bond 2012 the Wifi system will be at the end of life between 2025-2027 and therefore needing additional funds for replacement.
  - End of life Classroom Tech and Infrastructure Replacement for Bond 2012 schools, asbestos abatement for 4 schools is estimated at \$31.1 Million (includes 25% inflation costs and 10% contingency on hardware costs)

- End of life Wireless Infrastructure in the 3 oldest (Kellogg, Lincoln, McDaniel) Bond 2017 schools plus LV contractors: \$3.5 Million (includes 25% inflation costs and 10% contingency on hardware costs).
- Wireless for boiler rooms: The facilities team has asked OTIS to provide an estimate on how much it would cost for the boiler rooms in each school to have wifi installed, including asbestos abatement. This would allow the facilities team to use their ipads in the boiler rooms and also for future maintenance equipment to be Smart enabled in the future for remote tracking and pre-sets.
  - This is estimated at \$10.5 Million (includes 25% inflation costs and 10% contingency on hardware costs).
- Project management costs to oversee the end of life gear projects in the data center and also Bond 2012 and 2017 schools. In addition, the wireless for boiler room project. Scope would include project schedule, PM oversight during implementation with LV contractors for updated infrastructure and classroom technology, project documentation and subject matter experts in electrical and design backgrounds would be an estimated \$3.3 Million.

### **HVAC and Energy Sustainability**

#### Server room HVAC System Installation:

Currently there are 403 server rooms and 325 of those server rooms do not have a mini-split cooling system in place which resulted in server room temps over the accepted range (80 degrees and over 100 degrees) during a 2 week window of testing in 2023. When equipment temperatures stray outside the accepted ranges, stressful situations can occur for the entire school and other district departments. For instance, when the environment is too warm, overheating can occur, which can result in unexpected server downtime as well as the school's physical cameras and other critical infrastructure systems. It is possible for servers to be too cool, as well. While this may not result in any server downtime, data center managers may not want to look at their electricity bill if they're keeping their computing rooms at certain chillier temperatures. The environmental impact of keeping servers this cool is also certainly not negligible. Keeping server rooms below the maximum temperature and above the minimum is important for business continuity and efficiency in the long run. The installation of mini-splits is more energy efficient which connects back to the district's energy and sustainability goals. This project implementation has the approval from OTIS, the physical security team, and FAM since it directly impacts school-wide operations. The installation will cost approx \$12.6 Million and currently some of that would be eligible for the Federal Infrastructure Plan rebate for mini-splits. This is proposed as a 2 year project and would include project management oversight.

### **Physical education (e.g., covered play areas)**

Physical Education instructional spaces are in need of improvement and expansion of teaching stations. This includes the addition of outdoor covered play spaces for 35 schools and the conversion of interior school space to Movement Labs in 26 schools.

The total anticipated need for Outdoor Covered Play Spaces is approximately \$33 million for 35 schools; 12 of those, or just over \$11 million in costs, are identified as Title 1 schools.

The total anticipated need for Movement Labs is approximately \$44 million for 35 schools. At least 6 sites, or approximately \$10 million in costs, are identified as Title 1 schools.

#### **Other potential scopes of work**

- Curriculum - The 2020 Bond included \$53M for the adoption of comprehensive and current instructional materials, across core subject areas, including language arts, math, science, the arts and social emotional learning.
- Performing Arts - PPS Visual and Performing Arts programming includes a full arts education across grade ranges. Significant instructional space needs are in performing arts including theater front and back of house spaces and instructional spaces for music and dance.
- Career Technology Education - Typical CTE facility upgrades include significant additions to building mechanical system capacity and the installation of dust hazard control systems. In addition these instructional spaces require additional electrical design and service, unique plumbing systems, and larger interior spaces for curriculum support.

#### *Capacity*

Growing school districts regularly categorize new schools as “capacity” investments. Capacity can also include improvements to support enrollment changes. The 2020 bond PPS set aside \$10 million to respond to student relocation needs stemming from the South East Guiding Coalition. An additional \$2 million was allocated for future expansion of Roosevelt High School.

Potential Capacity scope of work includes:

- Roosevelt High School phase 5 (increase school capacity to 1700 students)
- Support of future enrollment changes

#### *Modernizations*

School modernizations are a mix of physical facility improvements, educational facility improvements and (in some cases) capacity. For facilities with high FCI scores, full modernization is the most cost-effective avenue to address all needs. The 2020 bond includes planning funds for Cleveland High School and Ida B Wells High School.

Potential modernization options include:

- Cleveland High School
- Ida B Wells High School
- Tubman Middle School relocation

## **Harriet Tubman Middle School**

PPS is also planning for the relocation of Harriet Tubman Middle School. The State of Oregon has provided \$120 million to support the relocation effort, however the most recent cost estimates forecast a total project budget ranging from \$195 million to \$238 million.<sup>10</sup>

## **K-5 Learning Lab**

### *Contingency & Administration*

Program contingency is a risk management tool used to buffer against unanticipated costs such as:

- Higher than anticipated escalation costs
- Building code or zoning code changes
- Emergency facility needs
- Or any other unanticipated cost; discretionary or nondiscretionary

Throughout the course of bond programs, contingency funds are transferred to other scores of work. Bond programs end with a zero dollar contingency balance. We do not recommend budgeting contingency below 10% of total bond principal.

Administration funds the resources needed to carry out the bond work, including staff, bond issuance costs, insurance, etc.

## **Bond Implementation Constraints**

Bond planning takes into account the communities priorities as assessed against real-world constraints, including District bonding capacity, market capacity, implementation capacity, and community support.

The majority of bond work required physical construction and the ability to complete capital construction projects work has limits. Market capacity and operational capacity must be considered when planning for GO bonds.

Often the ability to complete the work in a specific timeline is dependent on the type of work. Since 2016 PPS has averaged about \$200M in capital spending per year. Annual spending fluctuates with some years closer to \$100M, and another year that exceeded \$250M. When the District is in the construction phase on multiple large projects (such as modernizations) the annual spending is closer to the top end of this range, when active projects are smaller in scale (and can only be completed in summer months) the annual spending is closer to the lower end of the range. Acknowledging anticipated future cost escalation, for planning purposes estimating a total capital outlay between \$150 million and \$250 million annually is reasonable.

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<sup>10</sup> The current Tubman relocation option includes construction of a new middle school and K-5 learning lab.

Note: PPS will have approximately \$650M available funds remaining of the 2020 bond in November 2024. Staff anticipates completing all 2020 bond work in 2028.

## Maintenance Considerations

Per Oregon statute, ordinary maintenance and repair costs can not be funded by GO bonds. Therefore an important consideration when planning GO bond projects are expected ongoing costs that must be absorbed by the District's general fund, or other fund source. Sample scopes of work that require non-GO bond funds include new technology or additional square footage.

## Resources

- Long-Range Facilities Plan - Vol. 1 - [LINK](#)
- Long-Range Facilities Plan - Vol. 2 - [LINK](#)
- Long-Range Facilities Plan Presentation - F&O Committee - 04 15 2021 - [LINK](#)
- Long-Range Facilities Plan Presentation - F&O Committee - 10 27 2021 - [LINK](#)
- Long-Range Facilities Plan Presentation - Board Work Session - 11 09 2021 - [LINK](#)
- Bond Planning Introduction - F&O Committee - 08 21 2023 - [LINK](#)

## Sample Bond Financing Options

1/18/24

		Approx Bond Amount (Principal)	Estimated Total Interest	Total Rev Needed	Approx Interest as % of Principal	Approx Length of Debt	Estimated Levy Rate	Potential Next Bond
A.1	Use available capacity below (e) levy rate   8-year debt term	\$450M	\$90M	\$540M	20%	8 years	\$2.50 / 1000 (renewal)	2032
A.2	Use available capacity below (e) levy rate   12-year debt term	\$850M	\$250M	\$1.1B	30%	12 years	\$2.50 / 1000 (renewal)	2036
A.3	Use available capacity below (e) levy rate   variable debt term	\$850M	\$325M	\$1.175B	38%	16 years (8 year drop)	\$2.50 / 1000 (renewal)	2032
B.1	\$1.5B principal amount   retain (e) levy rate	\$1.5B	\$575M	\$2.075B	38%	20 years (16 year drop)	\$2.50 / 1000 (renewal)	2040
B.2	\$1.5B principal amount   increase levy rate to \$3/1000	\$1.5B	\$250M	\$1.175B	17%	16 years (12 year drop)	\$3.00 / 1000 (\$0.50 increase)	2036
C.1	\$1.5B principal amount   8-year debt term	\$1.5B	\$300M	\$1.8B	20%	8 years	\$4.50 (\$2 increase)	2032
C.2	\$1.5B principal amount   12-year debt term	\$1.5B	\$400M	\$1.9B	26%	12 years	\$3.25 (\$0.75 increase)	2036
D.1	\$1.5B principal amount   retain (e) levy rate   variable debt term	\$1.5B	\$950M	\$2.45B	64%	24 years (8 year drops)	\$2.50 / 1000 (renewal)	2032

Blue = Independent Variable

## CONCEPTUAL BUDGETS

The budgets included in this document are conceptual. They are provided to illustrate general cost ranges to facilitate bond planning discussion. They are not final cost estimates.

	Cost Range (see staff memo for detail)		Sample #1	Sample #2	Sample #3	Sample #4
<b>Physical Facility Improvements</b>			<b>\$75,000,000</b>	<b>\$564,000,000</b>	<b>\$507,000,000</b>	<b>\$1,069,000,000</b>
Critical Systems						
Deferred Maintenance Backlog (Reduce FCI)	\$700,000,000 <sup>1</sup>	\$1,000,000,000 <sup>2</sup>	\$75,000,000	\$400,000,000	\$400,000,000	\$650,000,000
Roof	incl above	incl above	incl above	incl above	incl above	incl above
Mechanical	incl above	incl above	incl above	incl above	incl above	incl above
Capital Asset Renewal	\$0	\$1,700,000,000	\$0	\$0	\$0	\$0
Seismic	\$0	\$1,000,000,000	\$0	\$30,000,000	\$25,000,000	\$100,000,000
ADA	\$57,000,000	\$138,000,000	\$0	\$25,000,000	\$25,000,000	\$60,000,000
Security	\$140,000,000	\$225,000,000	\$0	\$25,000,000	\$25,000,000	\$60,000,000
Outdoor Spaces	\$68,000,000	\$103,000,000	\$0	\$25,000,000	\$0	\$60,000,000
Athletics	\$84,000,000	\$206,000,000	\$0	\$25,000,000	\$20,000,000	\$85,000,000
All Gender Restrooms	\$3,000,000	\$15,000,000	\$0	\$4,000,000	\$0	\$3,000,000
Other Examples						
Decarbonization	TBD	TBD	\$0	\$20,000,000	\$0	\$25,000,000
Emergency Capital	TBD	TBD	\$0	\$10,000,000	\$12,000,000	\$26,000,000
<b>Educational &amp; Technology Improvements</b>			<b>\$27,000,000</b>	<b>\$178,000,000</b>	<b>\$105,000,000</b>	<b>\$248,000,000</b>
Technology						
ERP	\$0	\$40,000,000	\$22,000,000	\$40,000,000	\$40,000,000	\$40,000,000
Device Refresh	\$0	\$65,000,000	\$0	\$50,000,000	\$25,000,000	\$65,000,000
Cyber Security	\$0	\$5,000,000	\$5,000,000	\$5,000,000	\$5,000,000	\$5,000,000
Data Center / Classroom Tech / Etc	\$0	\$50,000,000	\$0	\$25,000,000	\$10,000,000	\$50,000,000
Tech: HVAC & Energy Sustainability	\$0	\$13,000,000	\$0	\$13,000,000	\$10,000,000	\$13,000,000
Physical Education	\$10,000,000	\$77,000,000	\$0	\$15,000,000	\$10,000,000	\$25,000,000
Other Examples						
Curriculum	TBD	TBD	\$0	\$10,000,000	\$5,000,000	\$25,000,000
Performing Arts	TBD	TBD	\$0	\$10,000,000	\$0	\$15,000,000
Career Technology Education	TBD	TBD	\$0	\$10,000,000	\$0	\$10,000,000
<b>Capacity</b>			<b>\$0</b>	<b>\$10,000,000</b>	<b>\$0</b>	<b>\$10,000,000</b>
RHS - Phase 5	TBD	TBD	\$0	\$0	\$0	\$0
Enrollment Changes	TBD	TBD	\$0	\$10,000,000	\$0	\$10,000,000
<b>Modernizations</b>			<b>\$650,000,000</b>	<b>\$0</b>	<b>\$715,000,000</b>	<b>\$0</b>
Jefferson High School	TBD	TBD <sup>3</sup>	TBD	\$0	TBD	\$0
Cleveland High School	\$250,000,000	\$300,000,000 <sup>4</sup>	\$300,000,000	\$0	\$300,000,000	\$0
Ida B Wells High School	\$250,000,000	\$300,000,000 <sup>4</sup>	\$300,000,000	\$0	\$300,000,000	\$0
Harriet Tubman MS	\$20,000,000	\$50,000,000	\$50,000,000	\$0	\$50,000,000	\$0
K-5 Learning Lab	\$30,000,000	\$65,000,000	\$0	\$0	\$65,000,000	\$0
Prophet Center	\$0	\$0	\$0	\$0	\$0	\$0
<b>Admin + Contingency</b>			<b>\$97,760,000</b>	<b>\$97,760,000</b>	<b>\$172,510,000</b>	<b>\$172,510,000</b>
Administration 3%	\$48,000,000	\$161,000,000	\$22,560,000	\$22,560,000	\$39,810,000	\$39,810,000
Contingency 10%	\$161,000,000	\$535,000,000	\$75,200,000	\$75,200,000	\$132,700,000	\$132,700,000
<b>TOTAL</b>	<b>\$1,821,000,000</b>	<b>\$6,048,000,000</b>	<b>\$849,760,000</b>	<b>\$849,760,000</b>	<b>\$1,499,510,000</b>	<b>\$1,499,510,000</b>
<b>Rounded</b>			<b>\$850,000,000</b>	<b>\$850,000,000</b>	<b>\$1,500,000,000</b>	<b>\$1,500,000,000</b>

<sup>1</sup> Estimated amount needed to move average FCI from "poor" to "fair" (see staff memo for details)

<sup>2</sup> Estimated amount needed to address all FCA noted deficiencies (see staff memo for details)

<sup>3</sup> Estimated costs to complete the Jefferson High School modernization are currently being developed

<sup>4</sup> Updated project costs estimates are currently being developed

The provided information is intended to illustrate the tradeoffs and dependencies of GO bond package options. They include a variety of variables including overall bond amount, financing plan, priorities, etc. They have not been vetted with staff, stakeholders or community. They are not recommendations.

## SAMPLE BOND OPTIONS

### Sample #1

- **Bond Amount:** \$850M
- **Financing Scenario:** A.3
- **Scope Priorities:** Modernizations
- **Time to Complete Work:** 6 - 8 years<sup>1</sup>
- **Next Bond:** 2032 (8 years)

#### SCOPE OF WORK

##### Pros

- Continues long-standing and well known plan to modernize all high schools
- Allocates some money for Tubman relocation, but not enough for the current option. Tubman would need to find a more inexpensive option

##### Cons

- Minimal funds for other critical work
- Deferred maintenance would continue to increase and overall school conditions would continue to deteriorate (more schools would move into poor or critical condition). Impacts to schools (including closures) due to system failures would become more common
- Needed facility improvements such as seismic, accessibility, athletics and security would go unfunded
- PPS's upcoming decarbonization plan would go unfunded
- Critical technology improvements would go unfunded

#### FINANCIAL

##### Pros

- The existing estimated levy rate \$2.50/1000 is retained
- A planned drop in the levy rate would create revenue capacity for another bond under the current levy rate in 2032
- All work (including current approved work) would likely be completed around the time of the next bond

##### Cons

- The total premium amount is relatively low compared to overall need - though from a historic perspective the amount is very high
- Interest rates are high but not exorbitantly high; requiring about \$325M in interest to raise \$850M in principal
- With some debt extending 16 years, available revenue under the current levy rate in 2032 is likely limited - which may require the 2032 bond to include a levy rate increase

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<sup>1</sup> Including work currently planned

The provided information is intended to illustrate the tradeoffs and dependencies of GO bond package options. They include a variety of variables including overall bond amount, financing plan, priorities, etc. They have not been vetted with staff, stakeholders or community. They are not recommendations.

## Sample #2

- **Bond Amount:** \$850M
- **Financing Scenario:** A.2
- **Scope Priorities:** Address Existing Facility & Educational Needs
- **Time to Complete Work:** 8 - 10 years<sup>2</sup>
- **Next Bond:** 2036 (12 years)

### SCOPE OF WORK

#### Pros

- Funds allocated to make improvements including seismic strengthening, continue progress towards full ADA compliance, security upgrades, outdoor spaces, etc. however not enough to address all needs
- Majority of technology needs funded
- Some funds for educational improvements such as curriculum, performing arts, CTE

#### Cons

- Planned modernizations would not proceed
- Tubman would need to find a more economical relocation option
- Funds allocated to critical infrastructure (about \$30M \$35M per year) are not enough to improve current building conditions. Overall portfolio rating will continue to be poor.
- Not all needs will be fully funded - ADA, Security, Athletics, etc

### FINANCIAL

#### Pros

- The existing levy rate \$2.50/1000 is retained
- Interest costs are low-to-medium; requiring about \$250M in interest to raise \$850M in principal
- When the debt is retired (2036) there would be ample revenue under the existing levy rate for the next bond - making a levy rate increase more unlikely
- All work would be completed before the likely next bond in 2036

#### Cons

- The total premium amount is relatively low compared to overall need - though from a historic perspective the amount is very high
- No available revenue capacity under the existing levy rate until 2036
- Projects not funded in 2024 would likely have to wait until 2036

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<sup>2</sup> Including work currently planned

The provided information is intended to illustrate the tradeoffs and dependencies of GO bond package options. They include a variety of variables including overall bond amount, financing plan, priorities, etc. They have not been vetted with staff, stakeholders or community. They are not recommendations.

### Sample #3

- **Bond Amount:** **\$1.5B**
- **Financing Scenario:** **C.1**
- **Scope Priorities:** **Modernizations**
- **Time to Complete Work:** **10 - 12 years**
- **Next Bond:** **2032 (8 years)**

#### SCOPE OF WORK

##### Pros

- Continues long-standing and well known plan to modernize all high schools
- Allocates enough funds to relocate Tubman per current plans and build a new K5 Learning Lab
- Majority of technology needs funded

##### Cons

- Funds allocated to critical infrastructure (about \$30M - \$35M per year) are not enough to improve current building conditions. Overall portfolio rating will continue to be poor.
- Funds available to make improvements for seismic strengthening, continue progress towards full ADA compliance, security upgrades, outdoor spaces, athletics, etc. however not enough to address all needs

#### FINANCIAL

##### Pros

- Large principal amount
- Low interest costs; requiring only \$300M in interest to raise \$1.5B
- Debt retired in 8 years, leaving ample revenue for the next bond in 2028

##### Cons

- Requires a substantial increase in levy rate (\$2.00/1000)
- All work will not be completed until long after the next proposed bond (2032) is approved (ie - work approved in the next bond may not start for many years after the bond passage) - calling into the question for the need for another bond in 2032

The provided information is intended to illustrate the tradeoffs and dependencies of GO bond package options. They include a variety of variables including overall bond amount, financing plan, priorities, etc. They have not been vetted with staff, stakeholders or community. They are not recommendations.

## Sample #4

- **Bond Amount:** **\$1.5B**
- **Financing Scenario:** **D.1**
- **Scope Priorities:** **Address Existing Facility & Educational Needs**
- **Time to Complete Work:** **12 - 14 years**
- **Next Bond:** **2032 (8 years)**

### SCOPE OF WORK

#### Pros

- Allocates significant funds to to address critical building systems, enough to move overall PPS building condition from poor to fair
- Funds available to make significant improvements for seismic strengthening, continue progress towards full ADA compliance, security upgrades, outdoor spaces, etc.
- Technology needs funded
- Significant funds for educational improvements such as curriculum, performing arts, CTE

#### Cons

- Planned modernizations would not proceed
- Tubman would need to find a more economical relocation option
- Not all needs will be fully funded - ADA, Security, Athletics, etc

### FINANCIALS

#### Pros

- Large principal amount
- Retains existing levy rate
- The planned drop in the levy rate would create revenue capacity for another bond under the current levy rate in 2032

#### Cons

- Huge interest costs; requiring approximately \$950M of interest to raise \$1.5B
- Approved projects would not be completed until many years after next bond (2032) is proposed (ie - work approved in the next bond may not start for many years after the bond passage) - calling into the question for the need for another bond in 2032
- With some debt extending 24 years, available revenue under the current levy rate in 2032 is likely limited