



THE OREGON STATE BOARD OF EDUCATION

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

AGENDA

Regular Meeting
Public Service Building 251 A/B
255 Capitol Street NE
Salem, OR 97310
Thursday, April 20, 2023

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

Please note: all times are approximate.

1. Call to Order

A. **Roll Call**

Time: 8:30 AM

B. **Board Member Reports**

Time: 8:35 AM

C. **Break**

Time: 9:20 AM

D. **Director's Report**

Time: 9:25 AM

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2. Public Comment

Time: 10:35 AM

A. The State Board of Education will accept up to 15 minutes of virtual public comment. Individuals must register to provide virtual comment. Written public comment received will be posted to BoardBook. **57**

3. Consent Agenda

Time: 10:50 AM

A. Variance Requests for Pupil Transportation Vehicles: OAR 581-053-0070 **71**

B. Farm to School Education Grant Administration Update: OAR 581-017-0444 **78**

C. Complaints and Appeals Procedures Improvement Process: OAR 581-002-0001, 581-002-0009, and 581-002-0023 **82**

D. Charter School Renewal Request: Cottonwood School for Civics and Science **95**

E. School Sports Pre-Participation Examination Form: OAR 581-021-0041 **259**

4. Adoptions

A. Migrant Education Program Appeals Process: Temporary Rules **268**

Time: 10:55 AM

Liz Ross, Office of Teaching, Learning, and Assessment

5. First Readings



A. Instructional Materials List Update - New Edition of Curriculum Associates' iReady	280
<i>Time: 11:10 AM</i>	
Aujalee Moore, Mark Freed, and Alexa Pearson, Office of Teaching, Learning, and Assessment	
B. Division 22 Waiver Request: Eugene 4J	284
<i>Time: 11:15 AM</i>	
Susan Payne, Office of Teaching, Learning, and Assessment and Superintendent Andy Dey, Eugene 4J	
C. Update to Health Services Rule: OAR 581-022-2220	300
<i>Time: 11:30 AM</i>	
Kati Moseley, Office of the Director and Ely Sanders, Office of Enhancing Student Opportunities	
6. <u>Break for Lunch</u>	
<i>Time: 12:00 PM</i>	
7. <u>First Readings</u>	
A. Charter School Waiver Request: The Sauvie Island School	325
<i>Time: 1:00 PM</i>	
Kate Pattison, Office of the Director and Darla Meeuwesen, The Sauvie Island School	
B. Charter School Waiver Request: The Kalmiopsis Community Arts School	348
<i>Time: 1:10: PM</i>	
Kate Pattison, Office of the Director and Kaci Masongill Elder, The Kalmiopsis Community Arts High School	
8. <u>Informational Reports</u>	
A. Statute and Rules Regarding the Use of Native American Mascots in Public Schools	358
<i>Time: 1:25 PM</i>	
Cindy Hunt, Office of the Director and April Campbell, Office of Indian Education	
B. Update on Integrated Plans and Applications	367
<i>Time: 1:55 PM</i>	
Scott Nine, Office of Education Innovation and Improvement	
C. Implementation Update: Economically Disadvantaged Definition	412
<i>Time: 2:40 PM</i>	
Dan Farley and Jon Wiens, Office of Research, Assessment, Data, Accountability and Reporting	
9. <u>Adjourn</u>	
<i>Time: 3:00 PM</i>	



Oregon State Board of Education

Update

April 20, 2023

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Today...

- SB 744 Look Back and Next Steps
- 2023 Legislative Session



Community-Informed Recommendations for Equitable Graduation Outcomes

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The 2021 Oregon Legislature adopted Senate Bill 744, which presented Oregonians with a unique opportunity to pause, review, and discuss the inequitable impacts of current high school diploma policy and make recommendations that incorporate equity, accessibility, and inclusion for all of Oregon's students.

Senate Bill 744 Look Back

1. Background & Purpose
2. Engagement
3. Review/Study
4. Determinations
5. Recommendations
6. Next Steps

*“K-12 education needs to be transformative, preparing children to become cooperative members of their communities.”
— Oregon Resident*

Look for engagement process quotations throughout the presentation!

Purpose of the SB 744 Report

This report was completed in response to the requirements set forth in [SB 744 \(2021\)](#).

(5)(a) Not later than September 1, 2022, the department shall provide a report to: (A) The interim committees of the Legislative Assembly related to education; and (B) The State Board of Education.

- This report includes information from extensive and diverse engagement, a study, an analysis, and a set of determinations and recommendations all called for in the bill.
- This is not a request for rule changes or a legislative concept. ODE will await any further direction from the Legislature, the State Board of Education, and/or the Governor before taking action on any portion of these recommendations.

"I believe that all students can reach the graduation requirements. The question should be do these requirements seem meaningful to all students."

— Oregon Administrator

Important Clarifications

Academic knowledge and skills remain required to receive a diploma in Oregon. Oregon retains stringent requirements for teaching and assessment of reading, writing, math and all other content areas within high school courses, as high school credit requirements are not changed.

Oregon's high school graduation credit requirements are among the most demanding in the country; at present, only one state requires more credits to graduate (Education Commission of the States, 2019).

Families and educators shared that their children and students experience inequitable outcomes because they have had inequitable access to high quality instructional programming across their entire public education experience.

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Important Clarifications

Meeting rigorous requirements and earning a diploma at the end of 13 years of public education, should be a measure of accountability of the state's school system, not a responsibility solely saddled on students.

The report is comprehensive and must be reviewed as a whole to understand the “why” behind the recommendations and understand how those recommendations interact with one another.

The report names harmful inequities and ineffective practices that our system has held onto for too long. It proposes a new way forward, but demands additional engagement and resources to create and implement a relevant, equitable, and accountable diploma system in Oregon.

Equity is the effort to provide different levels of support based on an individual's or group's needs and strengths in order to achieve fairness in outcomes.

1. Oregon is stronger because of its incredible diversity.
2. Not all people, or all communities, are starting from the same place, nor has the system served all communities equally or equitably. We need to make sure communities most impacted by inequities have access to resources, power, and opportunity.
3. Our work toward equity isn't zero sum, meaning that increasing access to a student or group of students does not mean restricting access for others - equity benefits everyone.
4. Our goal is to make sure every student has equitable opportunities to succeed in school and has access to accurate, comprehensive, and relevant curricula.

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Named Diploma Requirement Inequities

*“I believe it is critical that Oregon continues to wrestle with the reality that traditional high school does not work for a significant number of students. **The core issue is how can we build accountability for outcomes, but flexibility in how those outcomes are obtained?** The significant percentage of students whose lives are impacted by trauma or poverty or homelessness will struggle disproportionately with an inflexible educational model.”*

— Oregon Superintendent

1. Experiences of systemic bias, including **limited access to adequate educational resources and educational guidance**, and support from practitioners, such as school counselors and teachers.
2. Disparities in the methods schools use for students to **demonstrate proficiency** in the reading, writing, and math Essential Skills lead to use of **time-intensive methods** that may result in reduced course and classroom learning opportunities.
3. Disparities in **award rates** of Oregon modified diplomas and in the **postsecondary enrollment and employment rates** for students who are awarded these diplomas.

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Engagement Process & Results

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3,500

diverse students, community members, families, educators, and representatives of higher education and workforce and industry

- 56% identified as belonging to a community or group that has been historically marginalized
- 33% identified as parents or guardians of Oregon high school graduates;
- 22% identified as working in or having worked in an Oregon school;
- 18% identified as being a parent of a student who will be in high school in the next few years; and
- 11% identified as either current or recent high school graduates.

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Themes Raised by Community Members

Value of multiple pathways

Inequities in educational outcomes are caused by many factors beyond high school diploma requirements

Recognition of students' individual strengths, different learning styles, and the variety of environments that students are in

Culturally appropriate supports

Math, reading, and writing as core to learning (and math as a barrier)

Desire to further explore credit requirements and how proficiency in the above subjects is assessed

Desire to explore if multiple diploma options is serving students well, particularly for students with disabilities

Additional skills and knowledge needed after high school

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Skills Valued by Community Members

1. Foundational skills
2. Financial literacy
3. Life skills
4. Languages and language arts
5. Careers and trades
6. Employability skills and miscellaneous

*“All students should receive a good foundation in the basics to the best of their capabilities, but **the most important part of attending high school is to discover inspiration to pursue what interests them.**”*

— Oregon Resident

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Workforce and Industry Valued Skills



Oregon Department of Education

1. Work ethic
2. Professionalism
3. Communication skills
4. Life skills
5. Collaboration

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“Critical thinking demonstration; collaboration; work ethic; time management; anti-racist, anti-hate, diverse, multicultural ways to see all people in the world, empathy and self-awareness.”

— Oregon Workforce Representative

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Higher Education Valued Skills

1. Critical thinking and information literacy
2. Knowledge and skills in traditional/basic academic subjects
3. Communication skills
4. Career-related learning skills
5. Life skills

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“[High School] should involve more diverse writing experience, not just exposition. Math and basic literacy are emphasized to such a degree that much of what inspires students to excellence is being squeezed out of the high school experience. In my opinion we need less emphasis on final assessments and accountability criteria, and more emphasis on creating a climate that motivates exploration and self development.” — Oregon Postsecondary Professor

Educator Feedback



1. A relevant, attainable, and meaningful single Oregon diploma
2. Ensuring that students understand and have a voice in the diploma decision-making process
3. Careful planning and implementation of multiple pathways to a single diploma
4. Educator concerns about a single diploma

“Knowing what a student can do with their diploma would be . . . powerful, especially if they are required to do some kind of career pathway. If a student knew what those pathways would allow them to do in their future, [it] would be even more powerful.”

— Oregon Administrator



Review of Practices

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Review Process

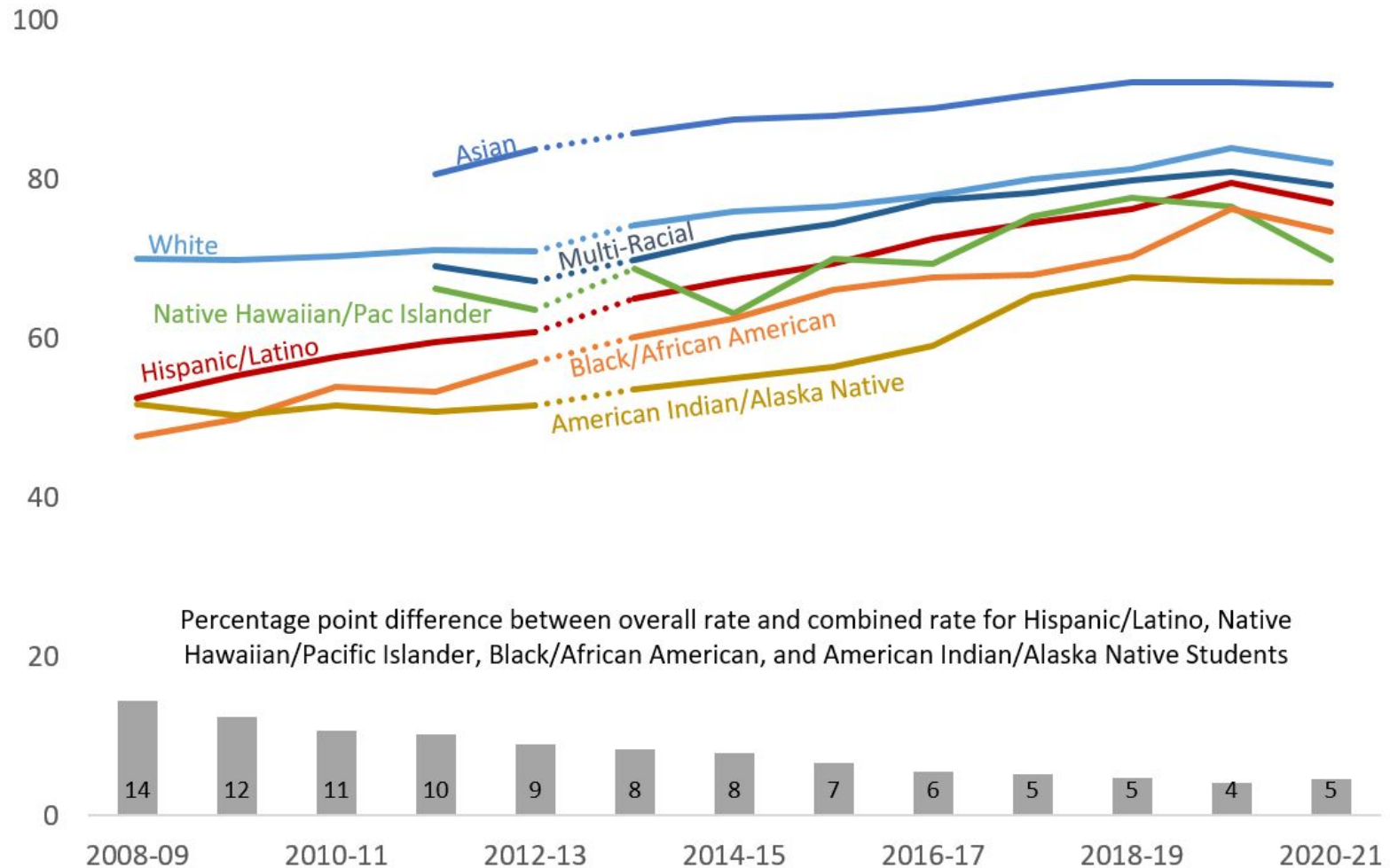
Investigation and analysis of:

1. Graduation data
2. Assessment of Essential Skills
3. Inequities and disparities
4. Diploma policies in other states and national trends

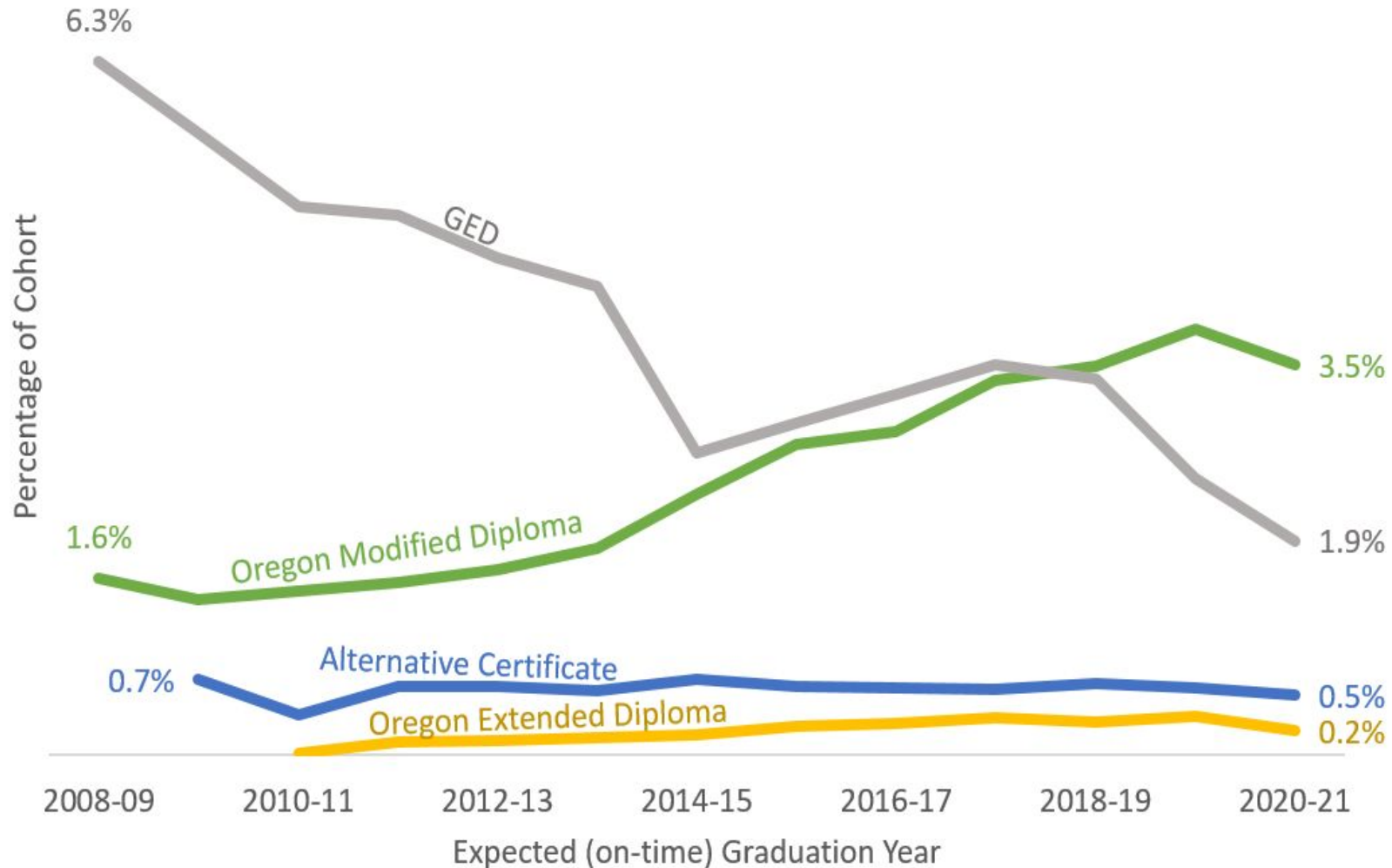
“[An] Oregon diploma should mean access to wherever they want to go even if they took different pathways.”

— Oregon Counselor

Oregon's Four-Year Graduation Rates by Race/Ethnicity



Percentages of Students Awarded a Modified Oregon Diploma/Extended Oregon Diploma or Alternative Certificate, or a GED (Four-Year Rates)

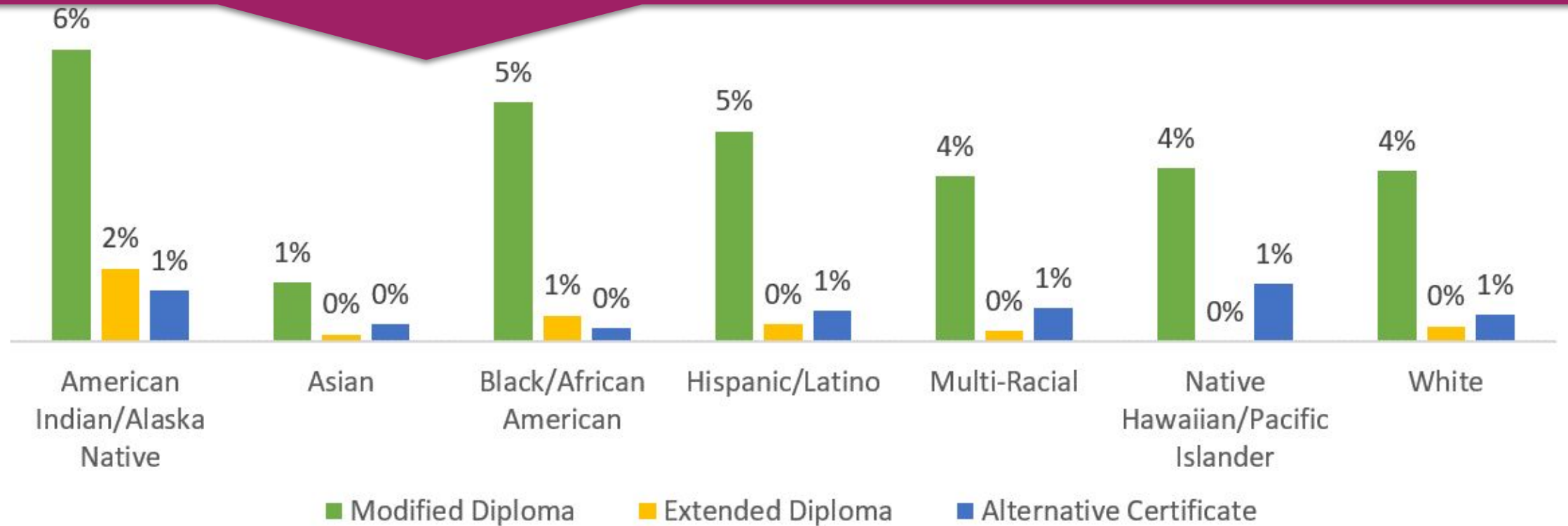


“Most of my students and their families do not understand the difference between a modified and a standard and are scared that it will affect them after graduation if they don't have the standard. But the requirements for the standard are above their abilities. I'm confused why, when we already had inequity among graduation rates, etc.; our state decided to split graduation types, etc. in the first place.”

— Oregon Educator

Percentages of Students Awarded a Modified or Extended Diploma, or an Alternative Certificate, by Race/Ethnicity (2019–20 Four-Year Cohort)

“Despite [extended diplomas and alternative certificates] not being recognized as ‘as ‘real diplomas’ by the state or potential employers, many of these students are still able to be placed in meaningful, gainful and appropriate employment opportunities that contribute to the community and a sense of personal well-being. My hope is there would be some way to document these outcomes...” — Oregon Resident



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What the literature says about the causes for graduation disparities:

Exclusion and inequities have been present from the start - our schools were not designed to welcome, include, and serve all students.

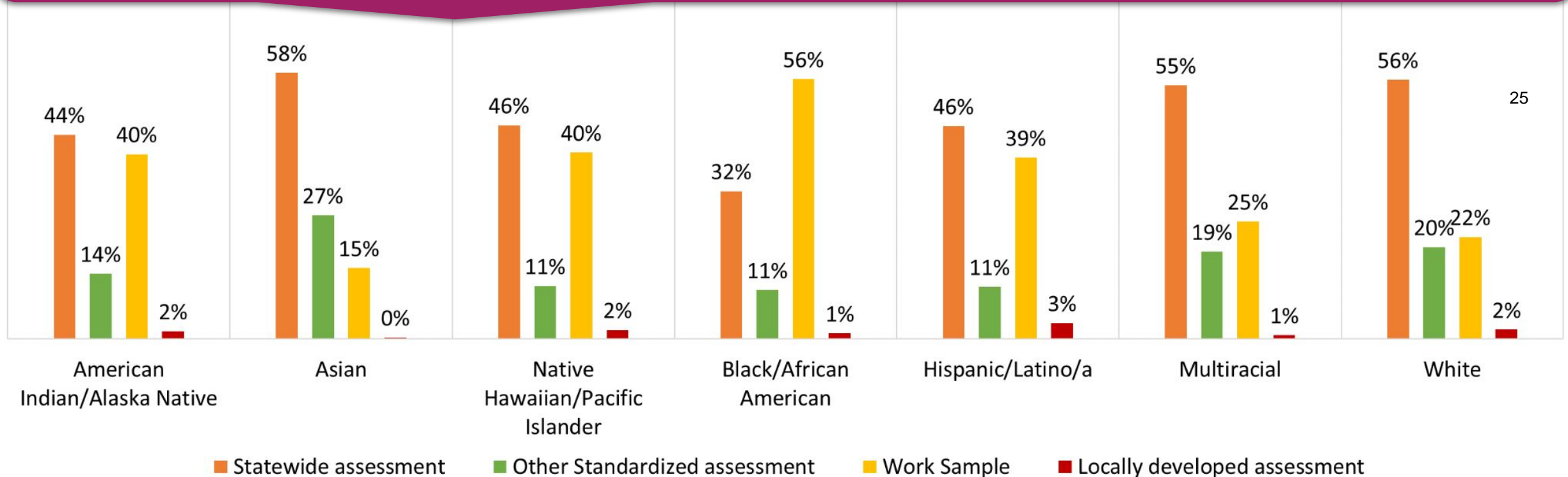
What engagement revealed about potential reasons for graduation disparities in Oregon:

1. Traditional mathematics course pathway that limits access to multiple courses in mathematics,
2. Assessment of Essential Skills requirements,
3. Lack of flexibility in diploma criteria,
4. Diploma requirements that are not always relevant and responsive to post-high school plans, and
5. Lack of understanding of requirements for different diplomas.

How Math Essential Skills are Met

“I do not believe that there should be a secondary validation system. Let's trust the teachers that we hire to work with our children to determine if they have demonstrated the learning in their classes at a level that is proficient.”

— Oregon Administrator



Diploma Policies in Other States & National Trends: Credits

Number of Credits Required for a Diploma	States
25	1- CT
24	13- AL, DE, DC, FL, HI, MS, MO, NJ, NM, OR , SC, UT, WA
23	3- GA, ID, LA
22	12- AZ, AR, KY, NV=22.5, NY, NC, ND, SD, TN, TX, VA, WV
21	4- AK, KS, MD, MN=21.5,
20	6- IN, MT, NE, NH, OH, RI
Less than 20	11- CA, CO, IL, IA, ME, MA, MI, OK, VT, WI, WY
CA=13, CO=0, IL=16.75, IA=14, ME=0-Proficiency, MA=0-Proficiency, MI=18, OK=17, VT=0-Proficiency, WI=15, WY=0	

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Source: [2019 ECS 50-State Comparison](#)

Diploma Policies in Other States & National Trends: Other Requirements

Several states have additional specific requirements, Oregon has many:

- Demonstration of Proficiency in three of the nine the Essential Skills
- [Personalized Learning Requirements](#) help students plan for their post-high school education and career goals. These include
 - [Education Plan and Profile](#),
 - [Extended Application](#), and
 - Career-Related Learning Experiences.
- Specific credit requirements:

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Language Arts = 4	Math = 3 <i>Only Includes Algebra I and Above</i>	Science = 3 <i>Must include Scientific Inquiry and Lab Experiences</i>
Health = 1	Physical Education = 1	Social Sciences = 3 <i>Must include at least 0.5 credit from Civics</i>
Electives = 6	World Languages, art, and/or CTE = 3	

Diploma Policies in Other States & National Trends: Exit Exams

States are moving away from high school exit examinations, with many states issuing retroactive diplomas to make amends for the inequities that the practice created for students during implementation:

- Only 11 states had graduation exit examinations in place for English language arts and math in 2020 (FL, LA, MA, MD, MI, NJ, NM, NY, OH, OR, TX, and VA).
- Twelve states recently ended graduation exit examinations (AR, AZ, CA, GA, ID, IN, MN, NV, OK, RI, SC, and WA).
- One state placed an exit examination moratorium (PA).
- Seven states delivered retroactive diplomas (AK, AZ, CA, GA, NV, SC, and TX).
- One state was planning a new series of graduation examinations (CO).

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POSTSECONDARY OUTCOMES OF
RECENT HIGH SCHOOL GRADUATES
Analysis in Support of Senate Bill 744
(2021)

Senate Education Committee

Amy G. Cox, Director

Shanda Haluapo, Senior Policy Analyst

Office of Research and Data

September 21, 2022

Photo citation

To support the work of Senate Bill 744 (2021), ODE asked HECC to examine two questions about the postsecondary outcomes of recent high school graduates

After implementing the assessment of the reading, writing, and mathematics essential skills:

Did first-year postsecondary outcomes improve?

Did equity in first-year postsecondary outcomes improve?

30

We assessed six outcomes for students overall and across four educational equity gaps

First-year postsecondary outcomes

1. First-year to next-fall retention rate
2. Percent of first-year credits completed
3. First-year grade point average (GPA)
4. Completion of college-level reading course within the first year
5. Completion of college-level writing course within the first year
6. Completion of college-level mathematics course within the first year

We tracked these outcomes before and after implementation of essential skills assessments

Equity Characteristics

- Race/ethnicity
- Urban/rural background
- Multilingual English language learners
- Disability

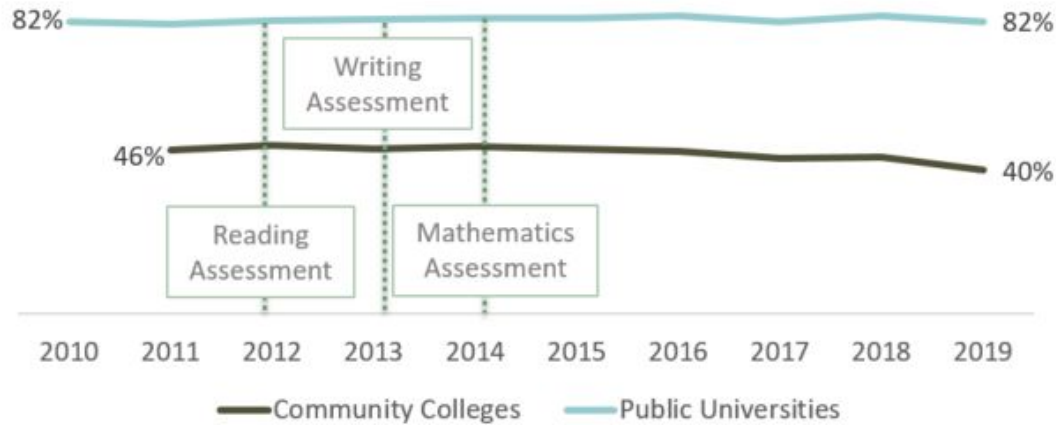
We examined gaps in the outcomes across these characteristics

Who: students who earned an Oregon public high school diploma and enrolled in an Oregon community college or public university within 16 months

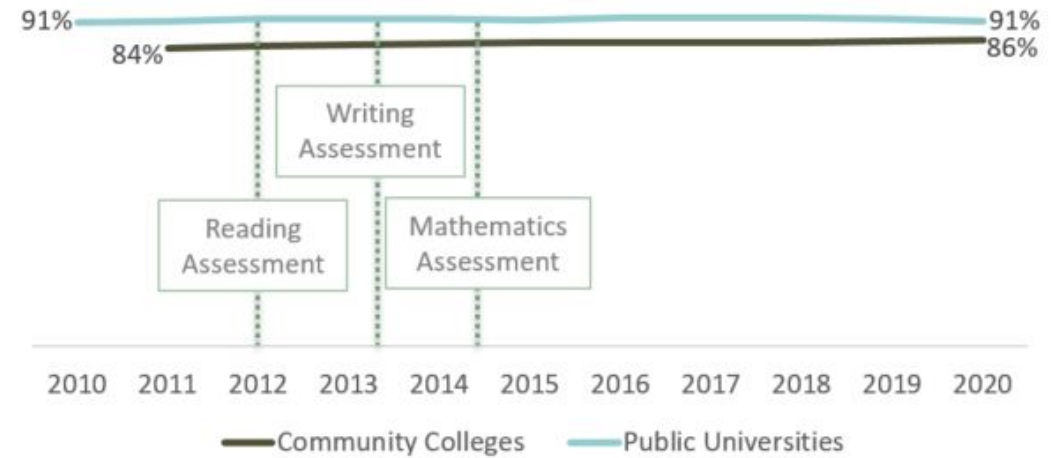
Data: Statewide Longitudinal Data System, HECC data

The first two outcomes did not improve with the implementation of essential skills assessments: first-year retention, percent of first-year credits completed

Retention fell slightly in the colleges and was stable in the universities



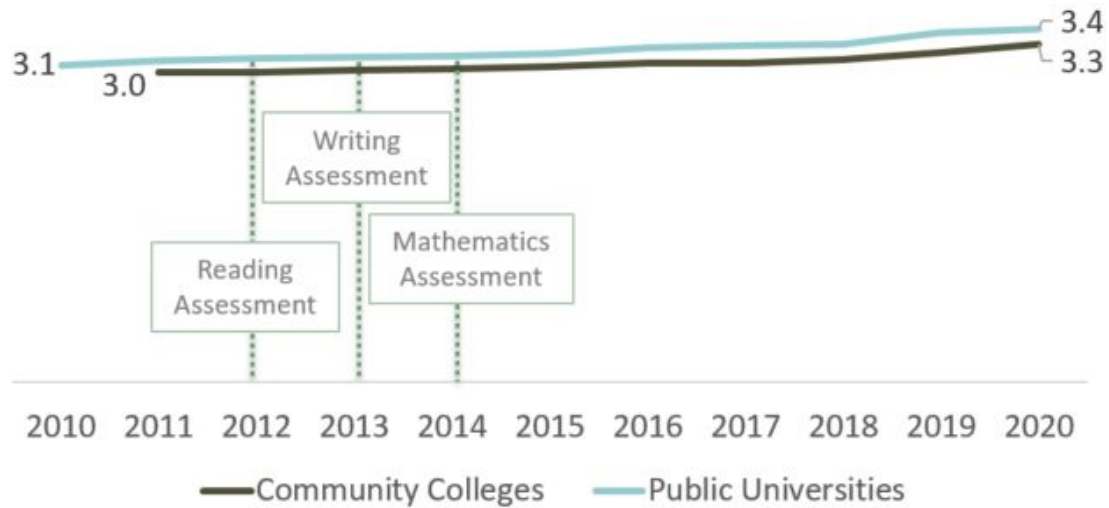
First-year credits completed remained stable



Equity gaps did not narrow after the implementation of essential skills assessments.
Where equity gaps existed across race/ethnicity, rural/urban background, multilingual English language learning, and disability, they remained

Grade point average (GPA) in the first year of college/university rose during this period but is not clearly attributable to essential skills implementation

First-year GPA rose, especially in the most recent five years, consistent with national trends

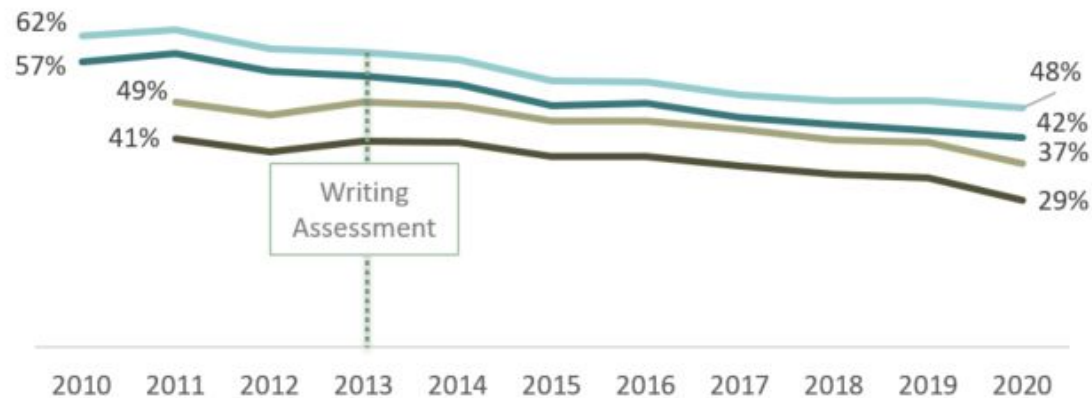
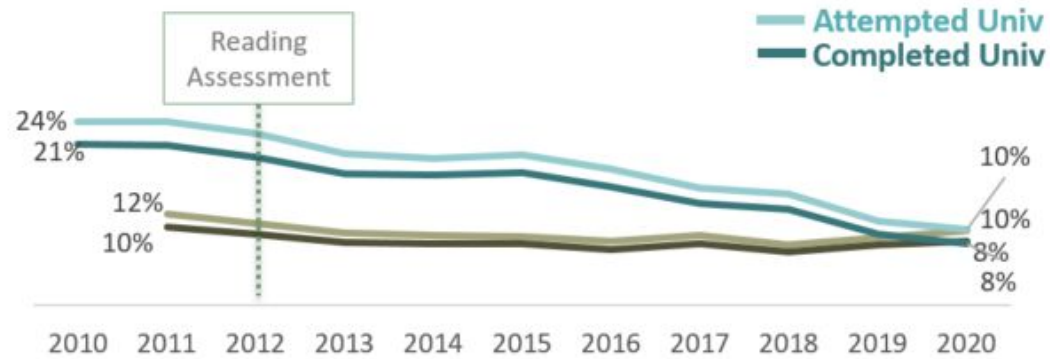


Equity gaps in first-year GPA remained largely unaffected

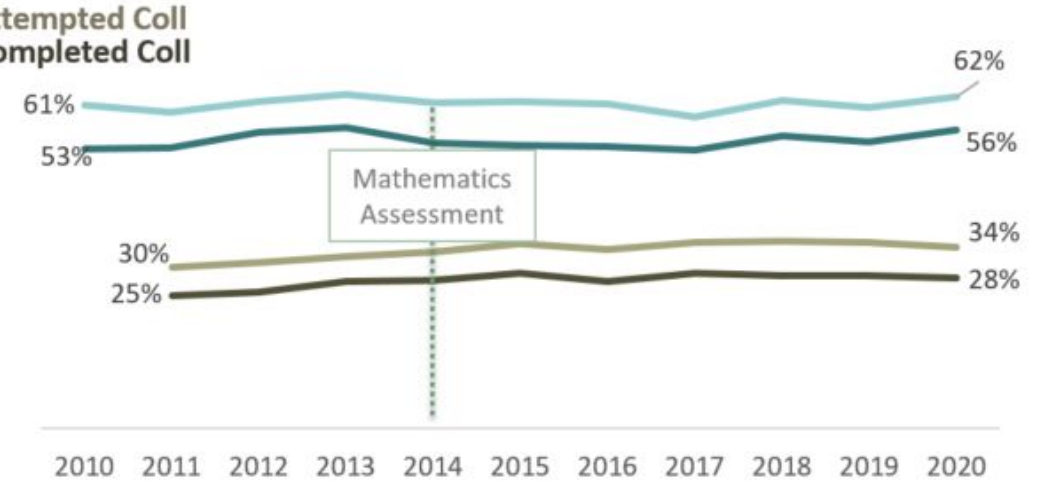
Students of color (except Asian American students), multilingual English language learners, and students experiencing a disability have lower GPAs than their systemically dominant counterparts, and these gaps did not narrow with the implementation of essential skills assessments.

Completing a college reading, writing, or math course in the first year did not rise with implementation of essential skills assessments

The percent of students attempting / completing college-level reading and writing mostly fell.



The percent of students attempting / completing college-level math rose slightly in comm. colleges.



Equity gaps did not narrow in reading or writing
Equity gaps in math narrowed slightly across race/ethnicity only

Conclusions. The assessment of essential skills does not appear related to first-year postsecondary outcomes nor with equity in the outcomes

In general, first-year outcomes in community college and public university did not improve after implementing essential skills assessments in reading, writing, and math in high school

Only first-year GPA and first-year college-level math showed improved outcomes, and these improvements parallel national trends

The implementation of essential skills assessments does not appear to have led to a narrowing of equity gaps in postsecondary outcomes by race/ethnicity, rural or urban high school, multilingual English language learners, and experiencing a disability in high school



Determinations

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Determinations



In response to SB 744, Section 1 (3)(e), ODE submits the following determination:

Determination 1: *ODE has determined that the skills and knowledge expected by business, industry, and postsecondary education do not fully align with the current requirements for the Oregon high school diploma.*

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In response to SB 744, Section 1 (3)(g), ODE submits the following determination:

Determination 2: *ODE has determined that the requirements for Oregon high school diplomas have been applied inequitably to different student populations.*



Recommendations

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Recommendations Built from Engagement, Informed by Data and National Trends

1. **Center accountability on systems, not students.** Place accountability on systems to provide the educational resources needed to make requirements feasible for students.
2. **Reflect student and community assets.** Equity in graduation requirements demands that Oregon's diploma process honors and recognizes student, family, and community culture, assets, and strengths (especially communities who have been historically marginalized) 39
3. **Prepare students for their futures.** Diploma requirements must be designed so students are prepared to thrive in the ever complex and changing world after graduation.
4. **Create coherence and clarity.** Diploma requirements should be accessible, with clear expectations and steps to achieving a diploma identified.

Engagement Required for Any Implementation

The **recommendations are born of the input gathered through engagement and the study**. People who participated in engagement raised these issues and ideas.

- Diverse representation of Oregon's students, families, educators, community, business & industry, and higher education would all need to be re-engaged for deeper input around the specific recommendations that came forward.

The recommendations in the SB 744 report **led to no immediate action**.

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- Legislature, Governor, and State Board must determine what action, if any, to take, and on what timeline.

The recommendations all point to **additional study of impacts and further engagement being needed** to adjust, inform, and guide any changes.

- Resources must be identified and provided to support any move toward implementation.

The recommendations are in a list, but **none should be implemented independently**

- Oregon's system of graduation requirements are interrelated, requiring a careful, coherent, and systematic implementation process.

Recommendation

- ① **Align the mathematics credit requirements** with other content area credit requirements by referencing the Oregon mathematics standards without prescribing a specific course as a starting point.

Comparison with current requirement:

- Retains the current 3-credit math requirement for an Oregon Diploma.
- Removes math course limitations and the specification for a course titled Algebra 1.
- *Retains the exact same math standards for learning that lead to credits which meet diploma requirements.*

Potential impact:

- Provides students the opportunity to pursue more relevant math course sequences aligned with the 2022 Oregon State Mathematics Standards.
- Allows students to learn math that is meaningful for their postsecondary preparation life and careers.
- Reduces course repetition rates and related opportunity costs.

Recommendation

2

Add a 1.0 credit requirement for a Future Planning course (within the existing 24 credit requirements) that includes financial planning, interviewing, resume building, Free Application for Federal Student Aid (FAFSA) and Oregon Student Aid Application (ORSAA) completion, and other post-secondary preparation that will impact future success.

Comparison with current requirement:

- Adds an additional 1.0 credit requirement for a future planning course, within the overall 24 credits.

Potential impact:

- Helps ensure that students graduate with the life skills needed to be ready for independent living in postsecondary contexts.
- Helps ensure that students graduate with resources and skills needed to navigate college and/or career options.

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Recommendation

3

Expand the Education Plan and Profile requirement to include a two-year post-graduation plan; establish increased support and accountability for schools to provide instructional time and support for students to complete the Education Plan and Profile; revise the Education Plan and Profile to function as a means of tracking all graduation requirements.

Comparison with current requirement:

- This is an extension of an existing requirement, along with provision of additional resources.
- Accountability shift from the student to the school and community, and ODE commits to providing increased guidance and support.

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Potential impact:

- Provides students with a plan that helps guide their pursuit of postsecondary goals.
- Leads to further discussions regarding how to better support students after graduation.

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Recommendation

4

Retain, but update the list of Essential Skills and definitions and then integrate these skills into the Future Planning course credit, the Extended Application diploma requirement, and the Career Related Learning Experience diploma requirement as well as throughout the educational experiences across K–12.

Comparison with current requirement:

- Skills will be updated to reflect current needs expressed by K-12 educators, workforce, industry, and higher education partners.

Potential impact:

- Focuses education on skills students need to navigate the 21st Century.
- Provides students with curricula, instruction, feedback, and resources aligned with these skills while their learning is underway.

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Recommendation

- 5 Maintain focus on math, reading, and writing proficiency through **demonstration of knowledge and skills in courses; remove the duplicative requirement** for all students to demonstrate proficiency again through a separate assessment (Assessment of Essential Skills). **Develop reporting for systems accountability** that publicly reports targeted staffing and post-secondary outcomes.

Comparison with current requirement:

- Students continue to demonstrate proficiency in foundational academic subjects through courses.
- Eliminates requirement for duplicative demonstration of proficiency through state-approved assessment.
- Eliminates the Assessment of Essential Skills student-level data collection.

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Potential impact:

- Removes an unnecessary barrier to graduation that has resulted in no clear benefit for students.
- Situates accountability for graduation on systems, versus exclusively on students, in Oregon.

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Recommendation

- ⑥ **Revise the Extended Application requirements** so they align with the updated Essential Skills list and definitions; establish increased support and accountability for schools to provide instructional time and support for students to complete the Extended Application.

Comparison with current requirement:

- Require districts to report adherence to each respective diploma requirement separately within Division 22 to ensure that all requirements receive appropriate attention and monitoring.

Potential impact:

- Helps ensure that all students have multiple means of showing what they know and can do by practicing the skills they will need in the future.
- Provides opportunities for students to practice these skills in relevant and engaging ways through completion of a specific project or program.

Recommendation

7

Revise the Career-Related Learning Experiences requirement so it aligns with the revised Essential Skills list and definitions, and academic standards and/or continuing technical education (CTE) skill sets; establish increased support and accountability for **schools to provide instructional time and support** for students to complete the Career-Related Learning Experiences.

Comparison with current requirement:

- Align Current Career-Related Learning Experiences requirement, Essential Skills, academic standards, and CTE skill sets.

Potential impact:

- Ensures that all students have opportunities for career exploration and flexibility in learning, particularly those who do not have as much access to career-related networks.
- Gives students opportunities to practice valued skills in context of career exploration relevant to fields of interest.

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Recommendation

8

Use practices and examples from around the nation on diploma pathways to **make a single Oregon Diploma accessible to all students.**



Comparison with current requirement:

- Focus on relevant pathways to support all students in attaining a single Oregon Diploma.

Potential impact:

- Increases opportunities for every student for wider opportunities after high school.
- Simplifies graduation policies to support family and student understanding of diploma options and pathways.

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Which of these did you see reflected in the recommendations and how?

1. **Center accountability on systems, not students** →
2. **Reflect student and community assets** →
3. **Prepare students for their futures** →
4. **Create coherence and clarity** →

Noticing Connections

Recommendation 1	<i>Align math credit requirements</i>
Recommendation 2	<i>Require Future Planning course</i>
Recommendation 3	<i>Expand Education Plan & Profile</i>
Recommendation 4	<i>Update “Essential Skills”</i>
Recommendation 5	<i>Demonstrate proficiency in courses; add postsecondary reporting indicators</i>
Recommendation 6	<i>Revise the Extended Application requirements</i>
Recommendation 7	<i>Revise the Career-Related Learning requirements</i>
Recommendation 8	<i>Transition toward a single Oregon diploma</i>

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Next Steps

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Next Steps

- This report delivered a community informed study and included a set of **determinations and recommendations** called for in the bill.
- **Current Diploma requirements exist in ORS and OAR.** Any steps toward implementation require direction or action of the Legislature, Governor, and State Board of Education.
- **Prior to any implementation ODE requests further and deeper engagement** with students, families, educators, business & industry, and higher education on the specific recommendations.
- As Oregon's leaders engage community, **diploma requirements remain uncertain** for students currently in high school and those entering high school in the fall.





Legislative Update

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2023 Legislative Session

- **1/17: 2023 Legislative Session Began**
- **2/1: Governor's Recommended Budget**
- **2/22: March Revenue Forecast**
- **4/4: First Chamber Work Session Deadline**
 - This is the last day for policy committees to move measures introduced in their chamber (i.e. Senate bills in the Senate, House bills in the House) out of committee. The deadline does not apply to Ways & Means, Revenue, Rules, and other joint committees.
- **5/17: June Revenue Forecast**
- **5/19: Second Chamber Work Session Deadline**
 - This is the last day for policy committees to move measures introduced in their chamber (i.e. Senate bills in the Senate, House bills in the House) out of committee. The deadline does not apply to Ways & Means, Revenue, Rules, and other joint committees.
- **6/15: Targeted Sine Die**
- **6/25: Constitutional Sine Die**

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ODE LCs, Pending Governor-Elect Approval

- **HB 2280: Definition of Consent for School Policies** - Scheduled in SED 4/25
- **HB 2281: District Appointed Civil Rights Coordinator** - Referred to SED
- **SB 215: Technical Fix Bill** - Moved to Sen Rules
- **HB 2275: Grant Consolidation Work** - Referred to SED
- **SB 421: Racial Equity & Youth Justice Collaborative - HB 4099 (2022) - Sen. Dembrow** - Referred to W&Ms 54
- **HB 3144: PI/NH Student Success Plan - Rep. Nguyen & Gov. Kotek** - Referred to W&Ms
- **SB 1050: Professional Learning for Ethnic Studies and Holocaust/Genocide - Gov. Kotek** - Referred to W&Ms
- **SB 1002: Supporting Districts with School Safety & Emergency Management - Gov. Kotek** - Referred to Rev
- **SB 3198: Early Literacy - Gov. Kotek & Rep. Kropf** - Referred to W&Ms/Informational scheduled today in SED
- **SB 1045: Secretary of State Systemic Risk Report Response** - Gov. Kotek - Moved to Sen Rules
- **LC 463: High School Success Updates** - Gov. Kotek
- **LC 454: Refugee & Immigrant Student Success Plan** - Gov. Kotek

Other Education Legislation Under Consideration...

- **SB 275:** TSPC moving to ODE - Referred to HED
- **HB 3199:** Middle School PE requirements - Passed House
- **SB 285:** OSCIM bond matching grants - Referred to W&Ms
- **SB 3:** Future ready and financial literacy diploma requirements - Referred to W&Ms
- **SB 409:** Curriculum posting requirements - Referred to HED
- **SB 283:** Omnibus educator workforce bill - Referred to W&Ms
- **Several Bills:**
 - Student & staff safety
 - Greater support and accountability for serving students with disability
 - School accountability: Local vs. state authority
 - School funding
 - Summer learning

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Questions?



56

Mrs. Catherine F. Steigerwald
1469 Goldstone Dr.
Central Point, OR 97502-1151

February 20, 2023

Oregon Dept of Education
255 Capitol St NE
Salem, OR 97310

RE: PETITION to the Oregon State Board of Education

I call on you to guarantee a Patriotic Education for all students in our K-12 schools. In doing so, I implore you to teach students the basic skills they need to function in society, such as reading, writing, and mathematics.

You must create a curriculum that teaches them all children are created equal, they have equal value under God, and they are citizens of a country that provides them equal opportunity to fulfill their destiny.

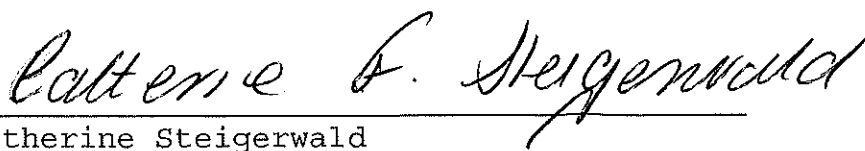
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You must give students a Patriotic Education. They deserve nothing less.

Sincerely x


Catherine Steigerwald

Mr. Chuck Wilcox
33758 E. Walls Rd.
Hermiston, OR 97838-6383

February 20, 2023

Oregon Dept of Education
255 Capitol St NE
Salem, OR 97310

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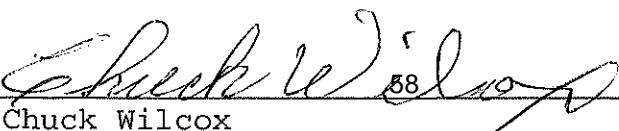
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Sincerely x 
Chuck Wilcox

Mr. Douglas Clarke
4801 Glenwood Dr.
Klamath Falls, OR 97603-8456

February 20, 2023

Oregon Dept of Education
255 Capitol St NE
Salem, OR 97310

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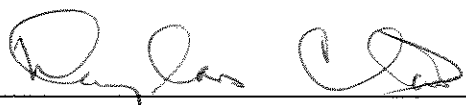
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Sincerely x 
Douglas Clarke

Mr. Edwin A. Case
P.O. Box 621
Canyonville, OR 97417-0621

March 30, 2023

Oregon Dept of Education
255 Capitol St NE
Salem, OR 97310

RE: PETITION to the Oregon State Board of Education

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You must give students a Patriotic Education. They deserve nothing less.

Sincerely x *Edwin A. Case*
Edwin Case

Ms. Julie Brown
2951 Coburg Rd.
Apt 204
Eugene, OR 97408-5036

February 20, 2023

Oregon Dept of Education
255 Capitol St NE
Salem, OR 97310

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Sincerely x Julie L. Brown
Julie Brown

Ms. Kathleen Sawaka
P.O. Box 504
The Dalles, OR 97058-0504

February 20, 2023

Oregon Dept of Education
255 Capitol St NE
Salem, OR 97310

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Sincerely x 
Kathleen Sawaka

Mr. Leonard C. Smith
P.O. Box 64
Woodburn, OR 97071-0064

February 20, 2023

Oregon Dept of Education
255 Capitol St NE
Salem, OR 97310

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Sincerely x 
Leonard Smith

Ms. Linda Brown
6397 N.W. 61st St.
Redmond, OR 97756-9108

March 30, 2023

Oregon Dept of Education
255 Capitol St NE
Salem, OR 97310

RE: PETITION to the Oregon State Board of Education

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64

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Sincerely x


Linda Brown

Ms. Lola Stevens
3800 Carman Dr.
Apt B223
Lake Oswego, OR 97035-2463

February 20, 2023

Oregon Dept of Education
255 Capitol St NE
Salem, OR 97310

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Sincerely x Lola C Stevens
Lola Stevens

3-9-23

Ms. Louise Warren
29229 Highway 34
Unit 43
Corvallis, OR 97333-2299

February 20, 2023

Oregon Dept of Education
255 Capitol St NE
Salem, OR 97310

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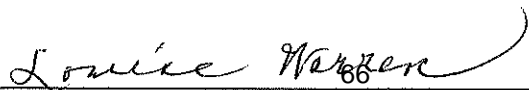
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Sincerely x


Louise Warren

Louise Warren

Ms. Pamela Ashley
2278 N.W. Mahala Way
McMinnville, OR 97128-6658

February 20, 2023

Oregon Dept of Education
255 Capitol St NE
Salem, OR 97310

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Sincerely x


Pamela Ashley

Mr. Rodney Jensen
171 Wingfoot Ct.
Winchester, OR 97495-8923

February 20, 2023

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255 Capitol St NE
Salem, OR 97310

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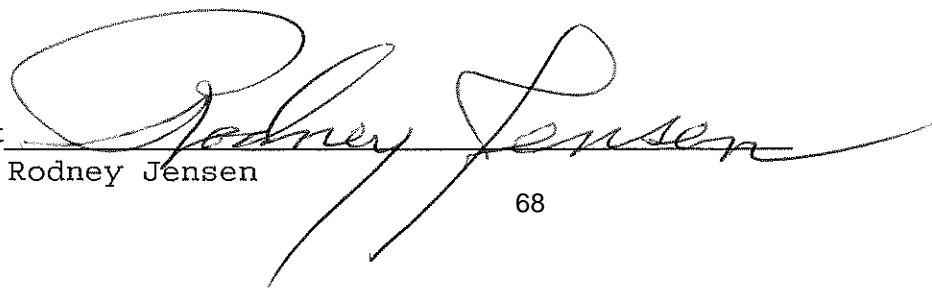
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Rodney Jensen

Ms. Sarah Israel
12852 N.W. Jarvis Pl.
Apt 10
Banks, OR 97106-6056

February 20, 2023

Oregon Dept of Education
255 Capitol St NE
Salem, OR 97310

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Sincerely x *Sarah Israel*
Sarah Israel

Ms. Vicki Winchester
9465 S.W. 125th Ave.
Apt 41
Beaverton, OR 97008-4039

February 20, 2023

Oregon Dept of Education
255 Capitol St NE
Salem, OR 97310

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Sincerely x 
Vicki Winchester

Oregon State Board of Education

April 20, 2023

AGENDA ITEM: 3.A.

<p>SUBJECT: Variance Requests for Pupil Transportation Vehicles/OAR 581-053-0070 School Bus and School Activity Vehicle Acquisition, Maintenance and Inspection STAFF NAME & OFFICE: Brock Dittus, Pupil Transportation & Fingerprinting</p> <p>In the interest of timely response to school districts with a legitimate need for variance requests, this rule change suggests a change in rule to require requests for variance to be addressed to the Director of Pupil Transportation rather than to the State Superintendent of Public Instruction.</p> <p><input type="checkbox"/> New Rule <input checked="" type="checkbox"/> Amend Existing Rule <input type="checkbox"/> Repeal Rule</p>	<p><input type="checkbox"/> First Reading <input type="checkbox"/> Presentation <input type="checkbox"/> No Presentation</p> <p><input checked="" type="checkbox"/> Action <input type="checkbox"/> Temp Rule <input type="checkbox"/> Presentation <input checked="" type="checkbox"/> No Presentation</p>
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BACKGROUND

Oregon Department of Education has established a pupil transportation program to regulate and oversee the operation of school buses and school activity vehicles within the state at all K-12 entities, both public and private. Oregon Administrative Rules Chapter 581, Division 53 entail a high standard of safety that has resulted in a longstanding safety record for Oregon’s pupil transportation industry.

Oregon has established specific standards for school buses as laid out in OAR 581-053-0240 Minimum Standards for School Buses. This exclusionary standard ensures that all vehicles in service to school districts, including those of contracted transportation company partners, will include the elements of design that make vehicles built to school bus construction standards the safest method for transporting students to and from school, or for school-related activities. Activity vehicles that are not school buses are built to the same standards with key exceptions to account for their purposes that maintain the same safety standards.

Certain needs in specific locations may occasionally raise the question as to whether a vehicle would be approved though it does not meet all specifications of OAR 581-053-0240. Examples of this include air filtration systems, for which a variance was granted early in the COVID pandemic, or installation of special equipment related to a student’s special need. In general, in the interest of maintaining a high standard of safety, requests are viewed from the perspective of how this would affect the safety of the student. For this reason, requests unrelated to a safety improvement are generally denied.

OAR 581-053-0070 School Bus and School Activity Vehicle Acquisition, Maintenance and Inspection outlines the requirements for submission and consideration of a variance request:

(5) Appeal for Variance:

(a) A transportation entity or contractor desiring to purchase a pupil transporting vehicle that cannot meet all required minimum construction standards for school buses or school activity vehicles as applicable in Oregon must forward an "Appeal for Variance" request to the State

Oregon State Board of Education

April 20, 2023

AGENDA ITEM: 3.A.

Superintendent of Public Instruction. This appeal must be made by the highest ranking official with the local operation and contain at least the following information:

(A) The need for such a vehicle;

(B) Why a standard school bus or school activity vehicle will not suffice;

(C) List of items which will not meet applicable standards; and

(D) Passenger capacity of vehicle.

(b) This variance provision is designed for unique changes or alterations necessary to accommodate special equipment or conditions.

In Oregon, the State Superintendent of Public Instruction has been a title taken on by the Governor themselves. The suggested rule change would identify the Director of Pupil Transportation as the designated recipient of requests for variance, allowing for more reasonable and timely review and response to such requests.

SUMMARY OF PREVIOUS BOARD ACTION

1. The rule revision was presented for its first reading at the March State Board of Education meeting.

HAS THE RULE CHANGED SINCE LAST BOARD MEETING?

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

POLICY ISSUE OR CONCERNS

No concerns have been identified regarding this proposed rule change.

EQUITY IMPACT ANALYSIS

No equity impacts have been identified regarding this proposed rule change.

FISCAL ANALYSIS

No fiscal impacts have been identified regarding this proposed rule change.

Oregon State Board of Education

April 20, 2023

AGENDA ITEM: 3.A.

EFFECT OF A “YES” OR “NO” VOTE

A “Yes” vote would identify ODE’s Director of Pupil Transportation as the recipient of requests for variance from established vehicle construction standards, allowing for efficient and timely responses regarding such requests.

A “No” vote would retain the existing language, requiring variance requests to be submitted to the State Superintendent of Public Instruction, a title currently held by the Governor.

STAFF RECOMMENDATION

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

ATTACHMENTS

Attachment 1: Revision of OAR 581-053-0070

Oregon Department of Education

Chapter 581

Division 53

SCHOOL BUS DRIVER TRAINING, LICENSING, AND SCHOOL BUS STANDARDS

581-053-0070

School Bus and School Activity Vehicle Acquisition, Maintenance and Inspection

(1) Upon entry into Oregon, all school buses and school activity vehicles shall conform to the Oregon minimum standards currently in force as they apply to each vehicle and to the Federal Motor Vehicle Safety Standards in place at time of manufacture, prior to transporting students.

(2) Transportation entities shall not transport students in any school bus or school activity vehicle until:

(a) The school bus or school activity vehicle license approval form has been received by ODE certifying that the vehicle meets all applicable minimum standards; and

(b) The transportation entity has received approval from ODE.

(3) Any additions of vehicle equipment or alterations in the vehicle construction that are not provided for in the applicable minimum standards for Oregon school buses or school activity vehicles are prohibited without first receiving prior approval from ODE.

(4) School buses and school activity vehicles used for transportation of students with disabilities or for specific educational purposes that do not meet all current Oregon Minimum Standards for School Buses must be approved by ODE.

(5) Appeal for Variance:

(a) A transportation entity or contractor desiring to purchase or use a pupil transporting vehicle that cannot meet all required minimum construction standards for school buses or school activity vehicles as applicable in Oregon must forward an "Appeal for Variance" request to the State Superintendent of Public Instruction Director of Pupil Transportation. This appeal must be made by the highest ranking official with the local operation and contain at least the following information:

(A) The need for such a vehicle;

(B) Why a standard school bus or school activity vehicle will not suffice;

(C) List of items which will not meet applicable standards; and

(D) Passenger capacity of vehicle.

(b) This variance provision is designed for unique changes or alterations necessary to accommodate special equipment or conditions.

(6) School buses and school activity vehicles shall be maintained in safe operating condition and shall meet or exceed the minimum standards in effect at the time of purchase, as well as any subsequently adopted standards that are applicable to the vehicle.

(7) The transportation entity shall keep vehicle maintenance records for each vehicle used to transport students. These records shall be available to ODE upon request. Records shall be kept for every service, adjustment or repair of the following items and shall include date and mileage:

- (a) Chassis lubrications;
- (b) Engine oil and filter changes;
- (c) Major engine tune-ups and repairs;
- (d) All adjustment, service and repair of brake system;
- (e) All adjustment, service and repair of steering mechanism and other related parts;
- (f) Tires; and
- (g) Drive train components.

(8) Notwithstanding OAR 581-053-0120, under the direction of a certified inspector, repair items listed below may be done by uncertified personnel:

- (a) Belts and hoses;
- (b) Body and paint repair;
- (c) Camera systems;
- (d) Electrical systems;
- (e) Exhaust systems;
- (f) Fluid changes;
- (g) Glass repair;
- (h) Lights;
- (i) Seat repairs;
- (j) Tires;
- (k) Tune-ups.

(9) Transportation entities or contractors planning to rebuild a school bus or school activity vehicle that has been totaled shall first secure written approval from ODE. (This does not apply to repair of damage.) All rebuilt school buses must meet current Oregon Minimum Standards for School Buses and applicable U.S. Department of Transportation regulations in affect at the time of approval.

(10) The transportation entity shall ensure the following is inspected daily:

- (a) Windshield and wipers;
- (b) All lights;
- (c) Service door;
- (d) Tires and wheel lug nuts;
- (e) Battery, belts, oil and coolant level;
- (f) Horns;
- (g) Brakes;
- (h) Steering;
- (i) Exhaust system;
- (j) See that lights, windshield, mirrors, and warning sign is clean;
- (k) Emergency equipment;
- (l) Emergency exits and audible warning devices;
- (m) Suspension;
- (n) Seats; and
- (o) Gauges

(11) Transporting entities shall have all vehicles used in transporting pupils inspected annually by inspectors holding current school bus inspection certification, and certify to ODE that all deficiencies have been corrected before September 1 each year. ODE shall furnish forms for the inspection and for the certification reports.

(12) ODE personnel may inspect school buses and school activity vehicles at any time or upon request of transportation entities. ODE may investigate accidents and examine school buses and school activity vehicles involved in accidents as ODE considers necessary.

(13) Upon inspection of school buses or school activity vehicles by ODE personnel, the vehicle owner shall be notified in writing of deficiencies. Such deficiencies shall be corrected within 30 days. If the vehicle owner is unable to correct the deficiency within 30 days, the transportation entity may submit a written request for an extension of time to ODE. Such request may be granted, provided the deficiency does not affect the safety of students or public, and is not contrary to Oregon Motor Vehicle Laws.

(14) ODE personnel may issue a written order that a vehicle is unsafe and shall not be used to transport students when there is reason to believe that a deficiency is such that continued operation of the vehicle may jeopardize the safety of students or public.

(15) The transportation entity or vehicle owner shall notify ODE in writing that the deficiency is corrected before transporting students in a vehicle that has been declared unsafe in section (14) of this rule.

Statutory/Other Authority: ORS 327.013 & 820.100 - 820.120

Statutes/Other Implemented: ORS 327.013, 820.100, 820.105, 820.110 & 820.120

History:

ODE 19-2012, f. & cert. ef. 6-14-12

Oregon State Board of Education

April 20, 2023

AGENDA ITEM: 3.B.

<p>SUBJECT: Farm to School Education Grant Administrative Changes OAR 581-017-0444</p> <p>STAFF NAME & OFFICE: Jessica Visinsky, Dustin Melton, Child Nutrition Programs</p> <p>The proposed amendment to this rules is a technical fix requested by stakeholders and partners to remove the date range for awarding of the grant. This will allow carryover of grant awards to the next biennia, if required.</p> <p><input type="checkbox"/> New Rule <input checked="" type="checkbox"/> Amend Existing Rule <input type="checkbox"/> Repeal Rule</p>	<p><input type="checkbox"/> First Reading <input type="checkbox"/> Presentation <input type="checkbox"/> No Presentation <input checked="" type="checkbox"/> Action <input type="checkbox"/> Temp Rule <input type="checkbox"/> Presentation <input checked="" type="checkbox"/> No Presentation</p>
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BACKGROUND

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

1. History:
 - a. What prompted the rule (why do we have it?) *State law? Federal law? Incident? Why are changes/amendments being proposed? ORS 336.431 directs ODE to administer grants within the Farm to School program. One such grant program is the Farm to School Education grant which provides grant funds to organizations to provide education of promotion about foods produced or processed in this state. OAR 581-017-0444 establishes rules for administration of this grant. Section (4) of the rule provides set boundaries for award of the funds, which has been an issue for grantees whose grants were not awarded until later in the biennium. The rule change would allow for carryover of awarded funds into the next biennium if required.*
 - b. What is the current requirement in rule or statute? *The department will award competitive Oregon Farm-to-School Program education grants for the biennium beginning on July 1, of the first year of the biennium, and ending on June 30, on the second year of the biennium. If funding is available, additional competitive grants will be awarded in subsequent biennia.*
 - c. Why is this rule being brought forward right now? *These changes were prompted by stakeholder and partner request and urging.*
2. Purpose
 - a. What function does the current rule hold? *The current rule provides guidelines for administration of the education grant.*
 - b. How long has the rule been in place? *The rule has been in place since 2016.*
3. Does the board have any areas of discretion or is this strictly mirroring statute? *The changes to the rule do not affect the overall statute for ODE's administration of the grant. The board may have discretion in how it views or approves the proposed changes affect on that administration..*

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4. Stakeholder voice/input (individual and collective i.e., groups)
 - a. *There has been extensive engagement with grantees, stakeholders and partnering agencies surrounding this rule and the need for the proposed change.*
 - b. *This was brought before the RAC twice with no request for changes.*

SUMMARY OF PREVIOUS BOARD ACTION

1. Has this been before the board before? If so, what action did the board take? *This was before the Board in March for a first read. No additional action was requested.*

HAS THE RULE CHANGED SINCE LAST BOARD MEETING?

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

EQUITY IMPACT ANALYSIS

1. *Traditionally we have seen the smaller organizations that apply for Farm to Education grants struggle the most with the grant application, review, approval and agreement requirement process. These projects are often delayed because of the long process and the funding goes unspent within the strict biennium rule. Removal of the language in OAR would allow for those groups to potentially carryover funds and continue their project work through to completion.*

FISCAL ANALYSIS

1. *No additional fiscal impact will be realized by this rule change.*

EFFECT OF A "YES" OR "NO" VOTE

Approving the rule change will allow grantees an opportunity to carryover grant awards to the next biennium and prevent funding for important projects to be lost.

STAFF RECOMMENDATION

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

ATTACHMENTS

Attachment 1: Draft Rule change

581-017-0444

Awarding and Using Competitive Oregon Farm-to-School Program Education Grants

- (1) The Oregon Department of Education shall allocate funds for competitive Oregon Farm-to-School Program education grants.
- (2) Competitive Oregon Farm-to-School Program education grants will be awarded to those eligible entities whose grant proposals are judged by the department as best addressing the applicable evaluation criteria.
- (3) The department will notify the eligible entities selected for a proposed competitive education grant award by either mail or email. Within two weeks of receiving notice, the entity must notify the department whether it accepts the award.
- ~~(4) The department will award competitive Oregon Farm-to-School Program education grants for the biennium beginning on July 1, of the first year of the biennium, and ending on June 30, on the second year of the biennium. If funding is available, additional competitive grants will be awarded in subsequent biennia.~~
- (5) The amount of any competitive Oregon Farm-to-School education grants awarded by the department on or after July 1, on the first year of the biennium, for the biennium beginning on July 1, will be at least \$2,000.00 and no more than \$100,000.00.
- (6) The recipient of a competitive Oregon Farm to School Program education grant that was awarded by the department on or after July 1, on the first year of the biennium, for the biennium beginning on July 1, may reserve up to twenty-five percent of the total amount awarded for all costs incurred through direct administration of the food-based, agriculture-based, or garden-based educational activities offered by the grant recipient, including administrative labor, supplies and indirect costs.
- (7) The department may reallocate competitive Oregon Farm-to-School Program education grant funds to other eligible entities if education grant funds either remain after awards are made or become unobligated, or if a grant recipient is not making adequate progress towards spending all of its grant award during the biennium in which the award was made.
- (8) Grant funds awarded for use in one biennium may not be carried over to the following biennium, and will revert to the department at the end of the biennium, unless otherwise determined by the department.
- (9) Recipients of a competitive Oregon Farm-to-School Program education grant must deposit the grant funds they receive in an account that is separate from their nonprofit food service account, or assign those funds a separate account or index number. Grant funds may only be used for the purpose of providing the food-based, agriculture-based, or garden-based educational activities it proposed to offer for the benefit of children enrolled in a public school or public charter school within a school district, or a center-based program for children.
- (10) The department may reallocate competitive education grant funds to other eligible entities if competitive education grant funds either remain after awards are made or become unobligated, or if a grant recipient does not spend all of its grant award during the biennium in which the award was made.

(11) The department, at its sole discretion, may disburse up to twenty-five percent of a grant recipient's award in advance if the recipient can first demonstrate a compelling need.

Statutory/Other Authority: ORS 326.051, HB 2579 (2019) & ORS 336.431

Statutes/Other Implemented: HB 2579 (2019) & ORS 336.431

History:

[ODE 9-2022, amend filed 01/27/2022, effective 01/27/2022](#)

[ODE 21-2021, temporary amend filed 06/22/2021, effective 06/22/2021 through 12/18/2021](#)

[ODE 7-2020, amend filed 03/20/2020, effective 03/21/2020](#)

[ODE 141-2019, temporary amend filed 09/23/2019, effective 09/23/2019 through 03/20/2020](#)

[ODE 25-2018, amend filed 08/17/2018, effective 08/20/2018](#)

ODE 47-2016, f. & cert. ef. 11-1-16

ODE 11-2016, f. & cert. ef. 2-5-16

Oregon State Board of Education

April 20, 2023

AGENDA ITEM: 3.C.

<p>SUBJECT: Complaints and Appeals Procedures Improvement Process: OAR 581-002-0001, 581-002-0009, and 581-002-0023</p> <p>STAFF NAME & OFFICE:</p> <p>Makes changes to ODE's complaints and appeals procedures in response to several listening sessions that were conducted during the summer of 2022.</p> <p><input type="checkbox"/> New Rule <input checked="" type="checkbox"/> Amend Existing Rule <input type="checkbox"/> Repeal Rule</p>	<p><input type="checkbox"/> First Reading <input type="checkbox"/> Presentation <input type="checkbox"/> No Presentation</p> <p><input checked="" type="checkbox"/> Action <input type="checkbox"/> Temp Rule <input type="checkbox"/> Presentation <input checked="" type="checkbox"/> No Presentation</p>
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BACKGROUND

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

1. History:
 - a. What prompted the rule (why do we have it?) State law? Federal law? Incident? Why are changes/amendments being proposed?

If a student experiences discrimination, restraint, seclusion, or educational retaliation at school, or if a student or parent of a student believes that a school is not complying with the Division 22 standards, the student or parent may file a complaint with their school district. If the student or parent is dissatisfied with the district's response, they may file an appeal with ODE.

The rules codified at OAR 581-002-0002 to 581-002-0023 govern the procedures by which ODE accepts, investigates, and resolves these types of appeals. These proposed amendments would update three of those OARS: OAR 581-002-0001, 581-002-0009, and 581-002-0023. The purpose of these amendments is to clarify ODE's interpretation of existing rules and improve ODE appeals procedures.

- b. What is the current requirement in rule or statute?

OAR 581-002-0001(1) defines "complaint" for purposes of describing when ODE will accept on appeal a complaint initially filed with an education entity.

OAR 581-002-0009(3) specifies that when ODE determines, after investigating an appeal, that an education entity is in violation of the law, the complainant and the education entity must first attempt to reach an agreement about how to resolve the matter *before* ODE issues a final order (ODE issues a final order only after the parties fail to reach an agreement).

OAR 581-002-0009(3) also specifies that when ODE determines, after investigating an appeal, that an education entity is *not* in violation of the law, ODE must issue a final order.

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- c. Why is this rule being brought forward right now?

ODE proposes amending the definition of “complaint” to clarify that ODE will accept appeals when complainants file informal grievances with education entities, including oral complaints alleging discrimination, unless the education entity directs the complainant to file a formal complaint.

ODE proposes amending the rule requiring the complainant and the education entity to attempt to reach an agreement so that when ODE finds a violation of a Division 22 standard, the agency immediately issues a final order. The theory behind the change is that whereas other types of violations, like discrimination, concern individuals, violations of Division 22 standards are public complaints involving the entire student body.

ODE proposes amending the rule requiring the agency to issue a final order upon *not* finding a deficiency so that the agency may issue a notice of compliance instead. The theory behind the change is that ODE can be more responsive to violations and provide students, when there is a violation, with a more timely response.

2. Purpose
 - a. What function does the current rule hold?
 - b. How long has the rule been in place?

The current rules set forth the procedures by which ODE processes appeals. They have been in place since March 25, 2019.

3. Does the board have any areas of discretion or is this strictly mirroring statute?
 - a. If the board does have discretion, those areas should be called out here or in the next section.

With the exception that ODE must take on appeal oral complaints alleging discrimination (which is a federal standard), none of the proposed changes mirror statute and the board has discretion to make changes to the proposal.

4. Stakeholder voice/input (individual and collective i.e., groups)
 - a. Who was involved in bringing this to the Board?
 - b. What did engagement in this process entail?
 - c. Who may be affected by this?
 - d. Whose voice is missing?
 - e. What additional information does the Board need prior to moving forward?

During the summer of 2022, ODE held eight separate listening sessions to discuss the agency’s appeals processes. A total of 44 invitees attended the sessions. Invitees included students, parents and caregivers, advocates, administrators from nine school districts, COSA, OSBA, and members of other education related organizations.

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The purpose of the listening sessions was to gather input from the community about ODE’s appeals processes and to elicit suggestions for improvement. ODE’s goal was to increase the equity, clarity, and accessibility of the processes for students and families and the education entities that serve them.

These proposed amendments (along with ODE internal practices and potential legislative action) were a topic of discussion at those listening sessions.

Since holding the listening sessions, ODE has presented the rules to the Rules Advisory Committee twice and first read the rules before the State Board of Education at the March 16, 2023, board meeting.

SUMMARY OF PREVIOUS BOARD ACTION

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

Yes. ODE presented these amendments to the State Board of Education at the March 16, 2023, board meeting. The rules were presented as part of a larger presentation informing the board about ODE’s appeals processes improvement project.

The board did not make suggestions to the rules, themselves, but did make comment on future improvements they would like to make to the appeals process.

HAS THE RULE CHANGED SINCE LAST BOARD MEETING?

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

POLICY ISSUE OR CONCERNS

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

1. Stakeholders
 - a. How have you intentionally involved stakeholders who are also members of communities affected by this rule?
 - b. Who are the historically underserved groups affected?
 - c. Has there been consultation or collaboration with tribes in this rule change or policy decision?
 - d. How has the Oregon Department of Education modified or enhanced the rule change or policy decision to address the needs of historically underserved communities?

As described above, ODE held eight separate listening sessions to discuss the agency’s appeals processes. These sessions were attended by a variety of community members, including groups

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advocating for racial equity and disability services, with one listening session fully dedicated to receiving input from tribes.

At the listening sessions, ODE proposed making three changes to its appeals process rules. ODE received overwhelmingly positive feedback on two of the proposals (changing the definition of “complaint” and immediately issuing final orders upon finding a violation of a Division 22 standard) and generally negative feedback on the remaining proposal. ODE is only moving forward with the two changes that received positive feedback.

Additionally, the greatest criticism of ODE’s appeals process is the length of time that it takes the agency to resolve an appeal. ODE is proposing the third change (allowing ODE the discretion to issue a notice of compliance upon finding that a violation did not occur) in response to that concern.

ODE is continuing to communicate with and solicit input from individuals who participated in the listening sessions to improve its appeals processes, including for this proposed rule change.

Following the listening sessions, ODE only received two comments about the proposed rule changes.

First, ODE received input from the Oregon Association for Talented and Gifted about other improvements that need to be made to ODE’s appeals process, and requesting to be invited to future listening sessions. ODE will ensure that the association is invited to future meetings concerning its appeals processes.

Second, ODE received a request from Willamette Education Service District to use the term “notifies” instead of “directs” in the new definition for complaint. If the state board made this change, the definition would read “unless the district ... *notifies* the complainant ... *of their right* to file the report or grievance in accordance with the district’s complaint process.”

ODE would like to ensure that it can take on appeal informally made grievances *unless* a complainant is explicitly told *to use* the education entity’s formal process. Notifying a complainant that a formal complaint process is available and that it is their right to file under that process is not the same as directing a complainant to *use* that process. If the definition were to use the term “notifies,” ODE would lose its ability to take on appeal informal grievances whenever a formal process *was mentioned* in connection with the grievance. For that reason, ODE does not recommend making a change based on this comment.

2. Negative/Positive Effects

- a. What is the impact on the population most affected by this rule that the board should consider?
- b. What possible opportunities, assets or access could this rule provide?
- c. What is the impact on eliminating the opportunity or achievement gap?
- d. Have all the potential unintended consequences been considered?
- e. Does this rule advance the ESSA goals?

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The rule changes will more clearly communicate to parents and students when ODE will accept an appeal, allow ODE to better serve student populations when there is a violation of a Division 22 standard, and allow ODE to reallocate resources to those instances where a violation occurred as opposed to those incidents where a violation did not.

3. What are the barriers to more equitable outcomes, either:
 - a. State or federally mandated?
 - b. Political?
 - c. Emotional?
 - d. Financial?
 - e. Programmatic?
 - f. Language?
 - g. Geography?
 - h. Size?

Allowing ODE the discretion to issue a notice of compliance instead of a final order upon finding that a violation did *not* occur will result in parents and students, and the education entities that serve them, not fully understanding how the law applies to their situation. ODE understands this barrier, and for that reason suggests that the board give ODE the discretion to determine when providing that information outweighs the timeliness of closing a case. Further, ODE believes that the balance of this proposal, in consideration of its limited resources, weighs heavily in favor of making the change.

EQUITY IMPACT ANALYSIS

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

1. How are historically underserved populations impacted by this docket item?
 - a. Demonstrate how the rule changes, policy, or action could produce other unintended consequences not listed in the docket.
 - b. Refer to *Policy Issue or Concerns* and identify the historically underserved populations affected. Conduct a reflection and examination, which will and should answer 1a.

ODE receives more complaints alleging discrimination on the basis of protected class – and especially on the basis of race, sex, sexual orientation, gender identity, and disability – than any other type of complaint. Of complaints where ODE determines a violation occurred, the majority involve discrimination. Although the proposed rule changes will affect all parents and students, they will have the greatest impact on parents and students belonging to these underrepresented populations.

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2. Examine the impact of the rule changes, policy, or action on historically underserved populations in Oregon. Describe this ongoing and/or foreseeable impact, using as much detail as possible.

The proposed amendments will clarify processes for individuals belonging to a protected class and the educational entities serving them. They also will allow ODE staff to allocate more of their time to incidents involving discriminatory conduct, specifically by allocating more time to instances where discrimination occurred.

3. Explain how the rule change, policy or action works toward improving achievement, opportunities and a sense of worthiness for underserved students?

Protected class harassment and other acts of discrimination make school an unsafe place for students and prevent students from being able to fully access their education. During the listening sessions, ODE learned that its current appeals processes are validating for students who suffer discrimination, but the agency also learned that its processes, due to untimeliness, do not serve students' immediate needs. Although not a replacement for necessary staff, the proposed amendments would allow ODE to speed up its processes for those suffering discriminatory conduct.

Students with a disability who lack the services that would allow them to fully access their education would similarly benefit from the proposed amendments.

FISCAL ANALYSIS

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

1. How does the proposed rule fit within the budget of the agency?
 - a. Which units/divisions/offices will be impacted and how?
2. How does the proposed rule change impact school districts and ESDs?
3. How does the proposed rule change impact schools and other educational institutions?
4. Does the proposed rule change impact other stakeholders?

The proposed amendments do not have a fiscal impact.

EFFECT OF A "YES" OR "NO" VOTE

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

If the board votes "yes," the proposed amendments will become immediately applicable to ODE's appeals processes. If the board votes "no," ODE will continue to process appeals as it currently processes them.

STAFF RECOMMENDATION

Oregon State Board of Education

April 20, 2023

AGENDA ITEM: 3.C.

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

ATTACHMENTS

Attachment 1: Draft Rules

DRAFT DATED 4/10/23 (MM)

581-002-0001 (Amended)

Definitions

For purposes of OAR 581-002-0001 to OAR 581-002-0023:

(1) “Complaint” includes any written report of wrongdoing or written grievance that a complainant emails, mails, or otherwise communicates to a district or district staff member, or any verbal report of discrimination, that is not filed in accordance with a district’s complaint process unless the district, within 10 days of receiving the report or grievance, directs the complainant, in writing in the complainant’s preferred language, to file the report or grievance in accordance with the district’s complaint process.

~~(1)~~ **(2)** “Department” means the Oregon Department of Education.

~~(2)~~ **(3)** “District” means:

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

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

~~(3)~~ **(4)** “Public Charter School” means an elementary or secondary charter school offering a comprehensive instructional program operating under a written agreement entered into between a sponsor and an applicant pursuant to ORS chapter 338.

~~(4)~~ **(5)** “Sponsor” means:

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

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

Statutory/Other Authority: ORS 326.051, ORS 339.303 & ORS 659.850 to 659.855

Statutes/Other Implemented: ORS 339.285 & ORS 659.850 to 659.855.

History:

ODE 8-2023, amend filed 03/29/2023, effective 03/29/2023

[ODE 11-2019, adopt filed 03/25/2019, effective 03/25/2019](#)

581-002-0009 (Amended)

Investigation

(1)(a) Within 30 days of the date on which the department gave notice under OAR 581-002-0007 that it is accepting an appeal, a district must submit to the department a written response and all correspondence, documents, and other information that the department requested in the notice. The written response must include:

(A) A statement of facts;

(B) A description of any district action taken in response to the complaint; or if district action was not taken in response to the complaint, an explanation of the reason or reasons that district action was not taken;

(C) Any stipulation reached concerning settlement of the complaint; and

(D) A list of complaints filed with another agency by the complainant concerning the subject of the appeal, to the extent that the district is aware of such complaints.

(b) Upon request, the Director of the Oregon Department of Education may for good cause extend the time by which a district must make a submission under paragraph (a) of this subsection.

(2) After receiving the written response under subsection (1) of this rule, the department will conduct an investigation to determine whether the district violated a law or rule described in OAR 581-002-0003.

(3)(a) Within 90 days of the date on which the department receives the district's written response under subsection (1) of this rule:

(A) If the department determines that a violation of a law or rule described in ~~OAR 581-002-0003~~ **OAR 581-002-0003(1), (2), (3), (4) or (5)** occurred, the department must issue a preliminary order to the complainant and the district. The preliminary order must include:

(i) A reference to the district decision that is on appeal;

(ii) The procedural history of the appeal;

(iii) The department's preliminary findings of fact; and

(iv) The department's preliminary conclusions.

~~(B) If the department determines that a violation of a law or rule described in OAR 581-002-0003 did not occur, the department must issue a final order as described in OAR 581-002-0017.~~

(B) If the department determines that a violation of a rule described in OAR 581-002-0003(6) occurred, the department must issue a final order in accordance with OAR 581-002-0017.

(C) If the department determines that a violation of a law or rule described in OAR 581-002-0003 did not occur, the department may:

(i) Issue notice that the department is closing the case; or

(ii) Issue a final order in accordance with OAR 581-002-0017.

(b) The Director of the Oregon Department of Education may for good cause extend the time by which the department must issue a preliminary order under paragraph (a) of this subsection.

Statutory/Other Authority: ORS 326.051, ORS 339.303 & ORS 659.850 to 659.855

Statutes/Other Implemented: ORS 339.303 & ORS 339.285 to 339.303

History:

[ODE 11-2019, adopt filed 03/25/2019, effective 03/25/2019](#)

581-002-0023 (Amended)

Settlement Conciliation and Remediation Occurring Before Issuance of Order (Amended)

(1) On any day preceding the date on which the department issues notice under OAR 581-002-0007, a potential complainant or a district may request technical assistance from the department with respect to an alleged violation of a law or rule described in OAR 581-002-0003.

(2)(a) On any day following the date on which the department issues notice under OAR 581-002-0007 and preceding the date on which a preliminary final order is issued pursuant to OAR 581-002-0009(3)(a)(A) or on which a final order is issued pursuant to OAR 581-002-0009(3)(a)(B), a complainant who files an appeal under OAR 581-002-0001 to 581-002-0023, and the district against whom the appeal is filed, may jointly request:

~~(a)~~ **(A)** To toll the proceedings described in OAR 581-002-0001 to 581-002-0023 for purposes of reaching a settlement agreement **an agreement through conciliation**; or

~~(b)~~ **(B)** For the district to immediately take corrective action **as proposed by the district and approved by the department** with respect to any allegation made by the complainant.

(b) Notwithstanding paragraph (a) of this subsection, the department may still require a district to provide the department with a response as described in OAR 581-002-0009.

(3) Upon request, the department will provide technical assistance to support the complainant and district in reaching a settlement agreement **an agreement through conciliation** or understanding the type of corrective action that may be taken.

(4) Any time during the tolling of proceedings described in OAR 581-002-0001 to 581-002-0023 for purposes of reaching a ~~settlement agreement~~ **an agreement through conciliation**, the complainant or district may communicate to the department that they no longer wish to negotiate a ~~settlement~~. Upon verifying that the complainant or district no longer wishes to negotiate a ~~settlement~~, proceedings described in OAR 581-002-0001 to 581-002-0023 begin at the point during the proceedings where the tolling began.

(5) Any ~~settlement~~ agreement entered into by the parties must be in writing and shall contain the following:

(a) A statement identifying the parties to the agreement;

(b) A statement that the parties entering into the agreement intend that the agreement will resolve the matters at issue in the appeal;

(c) A statement or list specifying the particular terms to which the parties have agreed;

(d) A statement that the parties have read and agreed to the terms contained in the agreement;

(e) The signature of each party to the agreement; and

~~(d)~~ **(f) A statement that the parties further agree that:**

(A) Upon execution of the agreement, the department will enter an order staying the proceedings until:

(i) The department confirms in writing that the parties have fulfilled the obligations contained in the agreement; or

(ii) The department has determined that a party has failed to fulfill the terms of the agreement.

(B) The department will continue to have jurisdiction over the matter while the parties are in settlement pending confirmation under subparagraph (A) of this paragraph;

(C) Any party having an obligation under the agreement shall notify the department in writing within 14 days of completing the obligation;

(D) The department may investigate either party's compliance with the agreement to determine whether the parties have met their obligations within the time specified in the agreement;

(E) If the department finds, by substantial evidence, that a party having an obligation under the agreement has failed to fulfill that obligation within the time required and no good cause exists

for that failure, the department may: **resume the proceedings at the time that the department entered the order staying the proceedings; and**

~~(i) Issue a final order that adopts the findings and conclusions contained in the preliminary order if a preliminary order has been issued; or~~

~~(ii) Resume the proceedings at the point during the proceedings where the tolling began if the preliminary order had not been issued when tolling began; and~~

(F) Upon completion of all obligations of the agreement as confirmed by the department, the department shall issue an order closing the appeal;

~~(e) A statement that the parties have read and agreed to the terms contained in the agreement; and~~

~~(f) The signature of each party to the agreement.~~

(6)(a) Upon execution of the settlement agreement, the department shall enter an order staying the proceedings until:

(A) The parties have fulfilled their obligations under the agreement, as confirmed by the department under paragraph (c) of this subsection; or

(B) The department has determined that a party has failed to fulfill the terms of the agreement, as described in subsection (7) of this rule.

(b) Any party having an obligation under the agreement shall notify the department in writing within 14 days of completing the obligation.

(c) Upon receipt of notice that a party has completed its obligation under the agreement, the department shall:

(A) Verify that the obligation required by the terms of the agreement has been completed by the party who provided the notice; and

(B) Issue written confirmation of the completion of the obligation to the parties.

(d) At any time, the department may investigate either party's compliance with the agreement to determine whether the parties have met their obligations within the time specified in the agreement.

(e) After the department has confirmed that all obligations required under the agreement have been completed, the department shall issue an order closing the appeal.

(7) If the department finds, by substantial evidence, that a party having an obligation under the agreement has failed to fulfill that obligation within the time required and no good cause exists for that failure, the department may: **resume the proceedings at the time that the department entered the order staying the proceedings.**

~~(a) Issue a final order as described in OAR 581-002-0017 that adopts the findings and conclusions contained in the preliminary order if a preliminary order has been issued; or~~

~~(b) Resume the proceedings at the point where the tolling began in the preliminary order had not been issued when tolling began.~~

(8) As part of any corrective action taken pursuant to subsection (2)(b) of this rule, the complainant and district must waive their right to seek judicial review of the corrective action under ORS 183.484.

Statutory/Other Authority: ORS 326.051, ORS 339.303 & ORS 659.850 to 659.855

Statutes/Other Implemented: ORS 339.303,

History:

[ODE 11-2019, adopt filed 03/25/2019, effective 03/25/2019](#)

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AGENDA ITEM: 3.D.

<p>SUBJECT: The Cottonwood School of Civics and Science Charter Renewal (State Board Sponsored)</p> <p>STAFF NAME & OFFICE: Kate Pattison, Charter School Specialist; Emily Nazarov, Government and Legal Affairs Manager; Amanda McAdoo, Cottonwood</p> <p>The Board must evaluate and decide whether to renew The Cottonwood Charter School for another charter term.</p>	<p><input type="checkbox"/> First Reading</p> <p><input type="checkbox"/> Presentation</p> <p><input type="checkbox"/> No Presentation</p> <p><input checked="" type="checkbox"/> Action</p> <p><input type="checkbox"/> Presentation</p> <p><input checked="" type="checkbox"/> No Presentation</p>
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BACKGROUND

The Cottonwood School of Civics and Science (Cottonwood) is one of four Oregon State Board of Education sponsored public charter schools. Approved for sponsorship in April 2007, Cottonwood first opened in September 2007 and the school is currently in its fifteenth year of operation. The Cottonwood School is located in the Portland Public School District and serves about 205 students in grades K-8. The purpose of the school is to provide a [place-based education](#), encouraging exploration of the natural world and involvement in the local community.

The State Board of Education received official written request from Cottonwood for renewal of the charter contract pursuant to ORS 338.065. This is Cottonwood’s fourth request to renew their charter contract.

On January 31, 2023, Department staff conducted a public hearing via Zoom for the Cottonwood community to provide input regarding the renewal. Seventeen people attended, including students, parents, staff, and Cottonwood Charter School board members. Twelve people provided spoken testimony at the meeting in favor of the renewal. The Oregon Department of Education (ODE) also received written testimony in favor of the renewal. (Please see the Public Hearing Officer’s Report and public hearing written testimony attached to this docket).

Renewal Process:

Public charter schools must be renewed by their authorizing board to continue operating. The renewal process and criteria for evaluating the school’s performance is outlined in ORS 338. Over the last five years, ODE staff have visited the school and met with school leadership many times. The school received a formal visit each year and informal visits, including observations of the charter school board meetings and professional development for instructional staff. During the COVID-19 pandemic response, ODE conducted virtual visits and observations. As part of the ongoing oversight and accountability, the school has participated in formal visits, required trainings, and submitted reports to ODE. The information gathered from the visits and reports, presented in three categories (academic performance, organizational performance, and fiscal performance) serve as the foundation for staff recommendation regarding the renewal of this school. The specific performance expectations for each category are mutually agreed upon in the Performance Framework and included in the charter contract.

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The Cottonwood school completed a renewal application and submitted it along with the formal request for renewal on December 30, 2022. The application includes an overview of the school's prior academic, financial, and academic performance as well as a description of what the school intends to accomplish over the next five years. This renewal application and appendices are included as an attachment.

The Department recommends a ten-year charter contract based on the school's performance. Cottonwood and the Department will ensure annual performance reports are submitted to the Board to monitor the school and ensure progress is being made toward goals and expectations.

Academic:

The Cottonwood school has generally performed well academically. When measuring the school's performance on the English Language Arts standards in the state assessment, the school has either met or exceeded the expectations included in the Performance Framework. In 2018-19, the school did not meet expectations in Math and the results from that year met the criteria to identify the school for targeted improvement support. Cottonwood was unable to complete all activities in the targeted improvement plan due to COVID-19, but still made some improvement with Math outcomes. The school is actively working on implementing a newer Math curriculum and hired a specialized Math teacher to provide instruction to students in grades 6-8 and coaching for teachers in grades K-5.

In March 2020, Cottonwood quickly pivoted to distance learning and was able to start providing instruction to students after spring break. Families reported that the school was able to shift so quickly "it didn't miss a beat" and students were "back in school" faster than many of the neighborhood schools. Staff prepared field work kits for students to expand their learning through hands-on activities at home and in their neighborhoods. The school was able to provide live lessons, recorded lessons, and meet with students 1-on-1 or in small groups to provide additional support and interventions. Cottonwood met the requirements of Distance Learning for All and eventually brought students back on campus through Limited In-Person Instructional opportunities.

Throughout the pandemic, as the school shifted from Distance Learning for All to Comprehensive Distance Learning (CDL), families and staff worked together to help students navigate the ever-changing requirements and guidance. The school leadership ensured all executive orders and guidance was followed, working closely with the LPHA, Department of Education, and families. This attention to guidelines allowed the instructional staff to focus on student learning and well being.

In 2020-21, the Department conducted a virtual site visit and observed instruction within CDL and school systems adapted to support students online. Then in 2021-22, the Department was able to visit the school in-person and conducted a hybrid site visit with some focus groups meeting virtually. In 2022-23, the site visit returned to full in-person focus groups and observations. Over this period, ODE has observed the school take significant efforts to diversify student population, staff demographics, and incorporate indigenous wisdom into the curriculum, school culture, and social emotional tools. The school has established an [Indigenous Studies Program](#) and partnered with [GRuB to use Plant Teachings](#) with students and staff.

Cottonwood adopted and implemented a new Math curriculum and has been working hard to train new teachers on place-based instructional strategies. The school is taking special care to understand how to be a place-based school in a post-pandemic reality serving students with new and more complex

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educational, mental health, and behavioral needs than ever before. The leadership is continuing to partner with Portland Public Schools (PPS) to ensure students who need specialized education support are served well. The school has seen an increase in the percentage of students who qualify for special education from 20% in the last year of the prior charter contract to 30% in 2022-23. The school also has 4 students being evaluated for special education services and 5 students with current 504s.

Figure 1 – Cottonwood Charter School Academic Performance Framework Ratings 2017-2021

MEASURE		2018-19 Rating	2019-20 Rating*	2020-21 Rating*	2021-22 Rating
1c	Economically Disadvantaged-ELA	Meets	No Rating	No Rating	Exceeds
1d	Economically Disadvantaged-MATH	Does Not Meet	No Rating	No Rating	Meets
1g	Students with Disabilities-ELA	Exceeds	No Rating	No Rating	Exceeds
1h	Students with Disabilities-MATH	Does Not Meet	No Rating	No Rating	Exceeds
1i	Underserved-ELA	Exceeds	No Rating	No Rating	Exceeds
1j	Underserved-MATH	Exceeds	No Rating	No Rating	Does not Meet
2a	All Student Growth-ELA	Meets	No Rating	No Rating	No Rating
2b	All Student Growth-MATH	Meets	No Rating	No Rating	No Rating
3a	Growth: Economically Disadvantaged-ELA	Meets	No Rating	No Rating	No Rating
3b	Growth: Economically Disadvantaged-MATH	Meets	No Rating	No Rating	No Rating
3e	Growth: Students with Disabilities-ELA	Exceeds	No Rating	No Rating	No Rating
3f	Growth: Students with Disabilities-MATH	Meets	No Rating	No Rating	No Rating
3g	Growth: Underserved-ELA	Meets	No Rating	No Rating	No Rating
3h	Growth: Underserved-MATH	Meets	No Rating	No Rating	No Rating
4a	Alignment to CCSS	Meets	Meets	Meets	Meets

**The state assessment system was waived for the 2019-20 and 2020-21 school years because of the COVID-19 pandemic.*

Operational:

Cottonwood has maintained strong compliance with all areas of operational performance expectations. A primary focus for the last three years has been the health and safety of the Cottonwood community and ensuring the school is compliant with the executive orders and pandemic guidance. Through regular meetings, phone calls, and virtual oversight, Cottonwood has demonstrated high levels of compliance with the COVID-19 pandemic requirements.

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Additionally, during the contract term, Cottonwood maintained necessary governance, policies, and compliance with education reporting requirements. The school is making continuous improvement efforts to ensure school systems are strengthened and updated as state policies and priorities evolve.

Figure 2 – Cottonwood Charter School Operational Performance Framework Ratings 2018-2022

MEASURE		2018-19 Rating	2019-20 Rating	2020-21 Rating	2021-22 Rating
10a	Education Program Implementation	Meets	Meets	Meets	Meets
10b	Education Requirement Compliance	Meets	Meets	Meets	Meets
10c	Rights of Students with Disabilities	Meets	Meets	Meets	Meets
10d	Rights of ELL	Meets	Meets	Meets	Meets
11a	Governance Compliance	Meets	Meets	Meets	Meets
11b	Administration Accountability	Meets	Meets	Meets	Meets
11c	Reporting Requirement Compliance	Meets	Meets	Meets	Meets
12a	Rights of All Students	Meets	Meets	Meets	Meets
12b	Staff Credentialing Requirements	Meets	Meets	Meets	Meets
13a	Facilities and Transportation Requirements	Meets	Meets	Meets	Meets
13b	Health and Safety Requirements	Meets	Meets	Meets	Meets
13c	Student Information	Meets	Meets	Meets	Meets
14a	Other Obligations	Meets	Meets	Meets	Meets

Financial:

The school has completed annual municipal audits and submitted financial reports to the Department each year of the charter contract. The school has consistently met all of the performance indicators and is taking steps to further strengthen the school’s internal controls.

The Department will continue to monitor financial management closely over the next term to see how the school is improving internal controls and managing decisions about the facilities which contribute to a significant expenditure and is a source of challenge for the school (with limited parking, lack of windows in some classrooms, and limited space to grow).

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Figure 3 – Cottonwood Charter School Financial Performance Framework Ratings 2017-2021

MEASURE		2018-19 Rating	2019-20 Rating	2020-21 Rating	2021-22 Rating
7a	Current Ratio: Assets/Liabilities	Meets	Meets	Meets	Meets
7b	Unrestricted Cash	Meets	Meets	Meets	Meets
7d	Loan Default	Meets	Meets	Meets	Meets
8a	Total Margin (income /revenue)	Meets	Meets	Meets	Meets
8b	Debt to Asset Ratio	Meets	Meets	Meets	Meets
8c	Cash Flow	Meets	Meets	Meets	Meets
8e	Reporting and Compliance	Meets	Meets	Meets	Meets
8f	GAAP	Meets	Meets	Meets	Meets

Note: Financial indicators include only 2-3 levels of performance, removing the “exceed” level. Therefore, “meets” is the highest level.

Statutory Renewal Criteria Evaluation

ORS 338.065 requires the board to use the following review criteria as the basis for the decision:

Figure 4 – Statutory Renewal Criteria Evaluation

ORS 338.065 Renewal Criteria	ODE Evaluation
(A) Is in compliance with this chapter and all other applicable state and federal laws;	YES – Cottonwood is maintaining compliance with state and federal laws.
(B) Is in compliance with the charter of the public charter school;	YES – Cottonwood has demonstrated consistency with meeting the performance expectations in the charter contract.
(C) Is meeting or working toward meeting the student performance goals and agreements specified in the charter or any other written agreements between the sponsor and the public charter school governing body;	YES – Cottonwood is consistent in meeting or exceeding the performance goals and agreements in the charter contract and the performance framework.
(D) Is fiscally stable and has used the sound financial management system described in the proposal submitted under ORS 338.045 and incorporated into the written charter under this section; and	YES – Cottonwood is fiscally stable and working toward improving internal controls as part of a sound financial management system.
(E) Is in compliance with any renewal criteria specified in the charter of the public charter school.	YES – Cottonwood has demonstrated consistency with meeting the performance expectations in the charter contract.

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SUMMARY OF PREVIOUS BOARD ACTION

The Board heard this request at the March 2023 meeting.

On June 21, 2018, the State Board of Education approved a five-year charter contract for Cottonwood.

HAS THE RULE CHANGED SINCE LAST BOARD MEETING?

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

POLICY ISSUE OR CONCERNS

ORS 338.065 requires the board to use the following review criteria as the basis for the decision:

(6)(a) The sponsor shall base the charter renewal decision on a good faith evaluation of whether the public charter school:

(A) Is in compliance with this chapter and all other applicable state and federal laws;

(B) Is in compliance with the charter of the public charter school;

(C) Is meeting or working toward meeting the student performance goals and agreements specified in the charter or any other written agreements between the sponsor and the public charter school governing body;

(D) Is fiscally stable and has used the sound financial management system described in the proposal submitted under ORS 338.045 and incorporated into the written charter under this section; and

(E) Is in compliance with any renewal criteria specified in the charter of the public charter school.

Cottonwood has at met the evaluation criteria in all categories.

Ten-Year Contract

Approving a ten-year charter contract positions the school to secure more favorable leases, loans, and other contracts to support students and efficiently use public funds. The State Board retains the authority to provide regular oversight and monitoring as well as and pursue contractual and statutory powers to terminate the contract if the school fails to meet performance expectations or for health and safety reasons.

Portland Public Schools

On February 22, 2022, Department staff sent a notice of the renewal recommendation and State Board Meetings to the charter school program director for Portland Public Schools (PPS). The notice was acknowledge by PPS staff. No comments or concerns were raised by the district. The Department has not received any complaints or documented any concerns raised by PPS throughout the duration of the current contract.

EQUITY IMPACT ANALYSIS

The Cottonwood School is located in the SW waterfront in Portland. The school has served about 200 students in grades K-8 since 2007. Cottonwood uses a place-based instructional model to engage students in a localized approach that considers the cultural, historical, physical, and environmental context and actors. Students at Cottonwood conduct fieldwork and are often outside the building in parks, farms, and downtown Portland. The school has established many partnerships across the region with private and public entities.

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In recent years, Cottonwood has leveraged multiple grants to expand and disseminate equity-focused educational activities. The school produced a middle school curriculum titled [Civil Rights and Civil Wrongs, The Black History of Portland](#). This was produced and disseminated through workshops with PPS educators and other groups in the area. Cottonwood has also prioritized its relationship with and learning from indigenous leaders from Oregon and the surrounding region. The school has reframed the full curriculum from westward expansion to an eastward view. The school welcomed a native artist to work with students and paint a mural on the school walls. Cottonwood established an [Indigenous Educator Advisory Group](#) that helps advise school leadership and acts as a resource to teachers.

At the renewal hearings for Cottonwood in 2018, the State Board urged the school to consider how it might further recruit, retain, and support more students and staff of color. Cottonwood has established a [Diversity, Equity and Inclusion Committee](#). The committee has helped the school establish affinity groups for families of color, inform policies of the school board, support the use of the [school's equity lens](#), and move the [DEI Work Plan](#) forward. Additionally, Cottonwood has added a Diversity Equity Inclusion and Belonging Coordinator to the leadership team who works closely with school leaders, teachers, families, and students.

In 2018-19, Cottonwood's student population was 23% students of color and 77% white students. With the help of targeted investments, cultural shifts, and systemic adjustments (including the implementation of a weighted lottery in 2022), the school's student population for the 2022-23 school year is 34% students of color and 66% white students.

When compared to PPS academically for the 2021-22 school year, Cottonwood students perform at higher rates in almost all categories. The school is working to improve math instruction and systems for intervention.

Figure 5 – Cottonwood Performance Compared to PPS 2021-22

2021-22 Indicator	Cottonwood Grades 3-8	PPS Grades 3-8	Framework Rating
ELA - Achievement			
• All Students	74.0	55.8	Not Rated
• Economically Disadvantaged	74.0	55.8	Exceeds
• Special Education	60.0	32.7	Exceeds
• Underserved Race/Ethnicity	62.5	26.4	Exceeds
MATH – Achievement			
• All Students	46.0	45.4	Not Rated
• Economically Disadvantaged	46.0	45.4	Meets
• Special Education	51.4	26.8	Exceeds
• Underserved Race/Ethnicity	12.5	17.6	Does not Meet

FISCAL ANALYSIS

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A decision to not renew Cottonwood would result in a loss of about \$190,000 a biennium. This is equivalent to about 23% of the funds the Department receives from the state sponsored charter schools that is used to fund all charter school staff and programs at ODE.

EFFECT OF A "YES" OR "NO" VOTE

"Yes" = The Cottonwood School of Civics and Science will be allowed to operate for another 10 years so long as it operates according to the law and specific requirements or targets negotiated into a new contract.

"No" = The Cottonwood School of Civics and Science would be able to finish the current school year and would eligible to file for a judicial review of the Board's decision. If the charter schools files for judicial review, the court may remand the decision back to the Board for reconsideration. The charter school could also choose not to file for judicial review and close at the end of the school year.

STAFF RECOMMENDATION

Approve Approve next month No recommendation at this time

ATTACHMENTS

Attachment 1: The Cottonwood School of Civics and Science Renewal Application

Attachment 2: The Cottonwood School of Civics and Science Renewal Application Appendices

Attachment 3: The Cottonwood School of Civics and Science Performance Framework 2021-22

Attachment 4: The Cottonwood School of Civics and Science Public Hearing Officer Report

Attachment 5: The Cottonwood School of Civics and Science At-A-Glance Profile 2021-22

Attachment 6: The Cottonwood School of Civics and Science Accountability Details 2021-22



THE COTTONWOOD SCHOOL
— OF CIVICS AND SCIENCE —

Charter Renewal Application

Submitted to

Oregon Department of Education

by the Board of Directors and Executive Director

The Cottonwood School of Civics & Science

Portland, Oregon

January 1, 2023

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I. Executive Summary

The Cottonwood School of Civics and Science is a small, public charter school, serving kindergarten through eighth-grade students in the Portland area. We are located in the South Waterfront district, near the banks of the Willamette River. We are currently in our sixteenth year of operation and are running at near capacity. Eight of our nine classroom teachers hold master degrees in education.

The mission of the Cottonwoods School is to promote place-based education. The guiding principles include knowing our history and our environment through long-term community partnerships, community service and field work. The Cottonwood School believes that healthy communities are created by engaged, informed, and compassionate citizens committed to service. Through service-learning, integrated curriculum, and experiential learning in authentic settings, the school provides opportunities to build relationships locally. This process allows students to find real world connections and inspire them to be catalysts of change in their own lives and the lives of others.

There is an ethic that runs under place-based learning. As humans, we cannot love what we do not know. At the Cottonwood School we are trying to grow children into adults who care about the place where they live. To do that we must show them how their city works, what it needs to grow and thrive, and how to tackle problems in their community. For the past 16 years the vision to look beyond classroom walls has remained true. With every curriculum or partnership project the mission remains at the center of the stages of planning.

Building strong community partnerships is at the core of the place-based approach. Over the past several years we have created lasting relationships with local organizations, agencies, and individuals. Through these partnerships, students have gained greater access to authentic curricular content, career knowledge, and audiences for their culminating projects. Students have also been able to provide services such as creating educational materials and collecting data for partners. Some of our strongest partnerships include Portland Parks and Recreation, Mirabella Retirement Community, Andersen Construction, the Portland Bureau of Environmental Services, and Tryon Creek State Park.

Our school is led by an executive director who is overseen by a board of five volunteer community members. The Board's oversight is defined in its bylaws. The board meets monthly and members work on initiatives through five committees: Finance, Fundraising, Governance, Mission, and Facilities. Other members of the leadership team include an academic director, a fieldwork and place-based education coordinator, diversity equity inclusion and belonging coordinator, behavior coach and an office manager.

CURRENT YEAR ENROLLMENT & DEMOGRAPHIC INFORMATION	
Total Enrollment	
Grades Served	K-8
# of Students Enrolled	206
# of Students on Waiting List	74
Gender	
# Non-binary	3
# Male	117
# Female	86
Ethnicity/Race	
# Hispanic	27
# Asian	10
# Black/African American	10
# White	136
# Two or more	23
Special Populations	
# Students with Disabilities	63
# English Language Learners	1
# Homeless Students	0
# Eligible for Free and Reduced Lunch	n/a
PROJECTED ENROLLMENT & GRADES SERVED	
Total Enrollment	
Projected Grades Served	K-8
Maximum Projected Enrollment	288

II. Looking Back: The Record of Performance

A. Academic Performance

A1. and A2. Evaluating Academic Progress using State Testing data has been challenging the past few years due to Covid and cancellation of state testing for the 2020 and 2021 testing years. We will share some steps we have taken in the past few years specifically to improve the performance of our students in math. We will also share data from last year which is the first year we've had reliable data for an entire school year since the 2018-2019 school year.

Math

In the 2018-2019 school year our school was targeted for improvement in math, particularly mixed race students, who underperformed compared to white students. We qualified for additional funding from the state and put our Continuous Improvement Plan into place for the 2019-2020 school year, only to see many of our efforts thwarted by the pandemic.

Nevertheless, we were able to provide teachers with 10 hours of math professional development during the 2019-2020 school year and 12 hours during the summer of 2020. We offered an additional 10 hours during the summer of 2021. In the Spring of 2021 we hired a .5 math intervention teacher to work with students in grades 4-8. We continued this .5 math support for the 2021-2022 school year, which decreased in February due to staffing issues and needing them to take over for a classroom teacher.

Beginning in the fall of 2021 we adopted I-Ready as our new math curriculum as our students headed back to the first fully in-person school year since the spring of 2020. This curriculum provided us with a more robust ability to collect data on a regular basis to improve teaching and learning- one of the recommendations from our 2018-2019 annual review. Like many schools we discovered that our students were returning to school with significant gaps in their learning. In the fall of 2021 only 22% of our students were at or above grade level. By the end of the year this percentage had increased to 49%.

Whole School- I-Ready Math (184 out of 188 assessed- '21-'22)

	Close to or above grade level	One year below grade level	More than one year below grade level
October 2021	22%	55%	23%
May 2022	49%	38%	13%

Breaking down the data by race and comparing two or more race students to white students(including hispanic/latino), we can see that both groups performed similarly showing large gains in students who were close to or at grade level. Students who were more than one year below grade level decreased by half for white/hispanic students, while that number increased from 20% to 35% for mixed race students. This is an area for improvement moving forward.

Whole School- I-Ready (by Race- White-including Hispanic/Latino- 148/151)

	Close to or above grade level	One year below grade level	More than one year below grade level
October	22%	57%	21%
May	50%	40%	10%

Whole School- I-Ready (by Race- Two or More- 20/20 students assessed)

	Close to or above grade level	One year below grade level	More than one year below grade level
October	15%	65%	20%
May	40%	25%	35%

On the SBAC in the 2020-2021 school year, the percentage of students who met or exceeded the standards was higher than the state average at all grades.

Grade	Met or Exceeded the Standards
3rd	45% (State-40%)
4th	45% (State-37%)
5th	50% (State-30%)
6th	30% (State-28%)
7th	62% (State-30%)
8th	43% (State-27%)

ELA

Our students showed very good performance on the 2021 statewide testing performing well above average compared to the state.

Grade	Met or Exceeded the Standards
3rd	71% (State-40%)
4th	81% (State-43%)
5th	68% (State-48%)
6th	80% (State-42%)
7th	75% (State-48%)
8th	76% (State-46%)

Our K-2 students struggled the most returning to in person learning after two years of being at home. Looking at our internal assessment data(EasyCbm), 29% and 50% respectively of our kindergarteners and first graders were able to read enough words in one minute to be at or above the 50th percentile. In 2nd

grade 64% of students were reading enough words in one minute to be at or above the 50th percentile. Last year we hired a .5 reading intervention teacher who is providing tier 3 support to students in grades K-3 to help alleviate some of the losses from the pandemic. We are reviewing schoolwide literacy data at least 3 times per year to determine if students need additional interventions.

The most recent academic performance recommendations come from the '18-'19 school year:

1. Continue alignment of Place-based Education to CCSS and integrating Math into PBE.
2. Continued professional development with Singapore Math to improve teaching and learning.
3. Review student, classroom and school wide data with staff on a regular basis to improve teaching and learning.
4. Review identification processes and supports for EL students.

The school administration and faculty have taken the following actions to address this feedback:

1) The Cottonwood School of Science and Civics continues to align Place-based education curriculum with the Common Core State Standards through the planning documents developed by our staff to document all place-based units at each grade level. This process experienced some interruption due to the pandemic, but teachers were guided to align their teaching with the priority standards identified by AchieveTheCore.ORG.

2. Our school adopted the I-Ready Math curriculum during the 21-22 school year. Teachers participated in professional development twice per year to develop their skills with this new curriculum. We do not yet have enough data to determine the effectiveness of this curriculum, but we did see big growth from the beginning of the year to the end of the year last year as noted above in the Academic Performance section. An area of future focus will be integrating math more closely with our place-based units- a task that was put on the back burner due to the pandemic.

3. Our educators continue to conduct research-based reading assessments(easyCBM.com) 3 times per year with all students and provide evidence-based interventions to struggling readers. We hired a .5 reading intervention teacher last year who is working primarily with students in grades K-3. She is helping to complete the easyCBM assessments, reviews data with teachers and provides tier 3 intervention support to students at highest risk.

Our new math curriculum(I-Ready Math), implemented last year, administers a diagnostic test 3 times per year that provides teachers with detailed information about student progress toward grade level standards. At least one professional development each year is geared towards reviewing this data in

depth to improve teaching and learning. We also have hired a math interventionist who works with grades 3-6 approximately 15 hours per week.

The Cottonwood school has implemented an earlier dismissal on Fridays to allow for extra staff planning time with focused time to review academic and behavioral interventions on a regular basis throughout the school year.

In addition to these ways the data is reviewed on an ongoing basis, we also set aside time for two staff retreats each year, dedicating three consecutive days toward the betterment of their practice, student achievement, and school culture.

4. The Cottonwood School finalized a comprehensive EL Plan, last school year and implemented an identification process to identify EL students in need of extra support. Our reading intervention teacher is conducting the screening assessments and will be administering the summative assessments in the Spring as needed. Currently, the Cottonwood School has one EL student identified.

A3. Provide evidence of outcomes related to any mission-specific academic goals and measures established in the charter contract.

The Cottonwood School believes that hands-on, experiential learning better connects our kids to their environment while also strengthening their scientific understanding of how the world works. The Next Generation Science Standards support the place-based approach by encouraging students to “do science.” In spite of the challenges of distance learning during Spring of 2020 through Spring of 2021, our school provided at-home learning kits with hands-on activities related to our place-based units including things such as rock and mineral kits for 3rd graders, animal dissection kits for 6th graders, electrical component kits for 7th/8th graders, salt dough ingredients for creating watershed models at 4/5, and art materials for creating pollinators at 1st/2nd grade. We do not have enough performance data on the OAKS Science test due to the lack of data for 2020 and 2021 and the completely revised test that was first administered in 2022. In the past, our science test scores have been much higher than the state or surrounding district.

The Cottonwood School was the recipient of a Gray Family Foundation Grant for three of the years during our renewal period. This grant aligns closely with our mission of place-based education. It supported geography education through integrating the indigenous perspective into place-based units at each grade level. This 3 year project included significantly revising our curriculum map in grades 3-8 to reflect the indigenous perspective through both historical events and the natural world. During the 3rd year of the grant, we worked with an indigenous advisory board to review the changes we had made to our place-based curriculum and advise on ways to strengthen the indigenous perspective. Learning kits were created at each grade level that included materials, books, videos and supplemental materials that reflected Indigenous perspective. The kits were designed with the Critical Orientation for Indigenous Studies as guiding essential understandings. Our staff also participated in a variety of professional

development opportunities including field trips, guest speakers and full day retreats to build our understanding of the 9 Essential Understandings developed in partnership with tribes and ODE.

Student Engagement

One commonly suggested component of the achievement gap is school's lack of relevancy for many students (National Education Association 2017, McNulty and Quaglia 2017, Bridgeland, Dilulio, and Morison. 2006, 4)¹ Through research conducted by the Place-Based Education Evaluation Collaborative, students reported being more engaged in place-based projects versus traditional classroom projects. (Place-based Education Evaluation Collaborative 2010)² Helping students to see a direct connection between their lives, their school, and their future can keep students interested, which makes them want to come to school.

Student Surveys

At the end of every school year, our students participate in an on-line survey to learn more about how they view the school. In the open-response section, students are asked, "What do you like about this school?" Each year we receive many responses from students who report how much they enjoy the fieldwork. Some students refer to place-based education specifically. Here are a few direct quotes from the 2021 survey:

"I think the projects are more engaging ... like life skills classes, expert teaching and Project Citizen."

"Racial topics, protesting, history."

"Fieldwork is more engaging than other times."

"The roller coaster/physics unit, the community action project, the immigration unit and ecology in science were all very enjoyable for me this year! These projects made a bigger impact on me and educated me."

¹ McNulty, Raymond J. and Russell J. Quaglia. 2017. *Rigor, Relevance and Relationships: Three Passwords That Unlock the Door for Engaged High School Students to Learn at Appropriate Levels*. Accessed February 18. <http://www.aasa.org/SchoolAdministratorArticle.aspx?id=6534>

National Education Association. 2017. *Identifying Factors That Contribute to Achievement Gaps*. Accessed February 18. <http://www.nea.org/home/17413.htm>

Bridgeland, John M., John J. Dilulio, and Karen Burke Morison. 2006. *The Silent Epidemic: Perspectives of High School Dropouts*. A report by Civic Enterprises in association with Peter D. Hart Research Associates for the Bill & Melinda Gates Foundation
www.ignitelearning.com/pdf/TheSilentEpidemic3-06FINAL.pdf

² Place-based Education Evaluation Collaborative. 2010. *The Benefits of Place-based Education: A Report from the Place-based Education Evaluation Collaborative* (Second Edition). Retrieved May 27, 2017 from <http://tinyurl.com/PEECBrochure>.

“All the fieldwork and learning about the indigenous/native people, Celilo Falls and making the tribe’s flags for our fence.”

It is clear that our place-based mission is helping kids stay engaged, an essential step in increasing academic performance and high-school graduation rates.

B. Financial Performance

1. See the **Appendix A** for the A/P Aging schedule that shows current accounts payable of \$28,800 as of 11/1/22. The majority of this balance is the October PERS obligation, a regular monthly charge that is drawn automatically from our bank account by PERS. **Appendix B** shows that our PERS statement shows a \$0 balance as of 10/25/2022. **Appendix C** is our Balance Sheet that shows payroll tax liabilities of approximately \$30,000, which is our typical monthly obligation and is paid in full the following month, each month of the year. The school does maintain a business credit card account and that balance is paid in full each month. The school does not have any other debt obligations.
2. **See the appendix D** for copies of the school’s 2020-2021 audited financial statements, audit letters, and internal financial statements.

C. Organizational Performance

1. During the 2021-2022 assessment year, the school was found to meet all standards in the Organizational Performance areas that were applicable.
2. Below are highlights of organizational Improvement Plan goals over the last 5 years and the measurable progress made against those goals:

Enrollment: Full enrollment in our current location has been a goal since 2012-2013. We are pleased that we have been able to maintain this through the pandemic, with 206/208 positions filled for the 2022.23 school year.

Diversify Students, Families and Staff: With the passage of SB 2954, The Cottonwood School implemented a weighted lottery for the 22.23 school year to give enrollment preference to historically underserved students.

- 21.22 school year Cottonwood had 30% students of color, 70% white
- 22.23 school year Cottonwood has 34% students of color, 66% white

Staff: In 2022-2023, we took measures to improve support of staff, students and families with the addition of the diversity, equity, inclusion and belonging coordinator, behavior coach and expanded school counselor positions. Notable benefits were realized immediately, including implementation of monthly BIPOC affinity groups, expansion of the breadth and depth of student SEL, and an increase in the quality and consistency of our behavior supports. Increased teacher support as a result of these positions, as approved by the board, has been one factor in retaining teachers. During the very difficult past few years, CSCS only experienced teacher turn-over in two positions for the 22.23 school year. The board has also made greater efforts to support and recognize staff, which strengthens the relationship between teachers and board members and leads to a feeling of mutual support and understanding.

Facilities upgrades: Incremental improvements have been occurring each year to improve the school environment and include: HVAC Enhancement in all rooms (9 classrooms, all offices, basement & Great Room) with portable high-efficiency particulate air (HEPA) room ventilators, a designated outdoor PE area leased from PBOT, new carpeting in all of our classrooms and new flexible seating to better serve the students at each grade level.

III. Looking Forward: Plans for the Next Charter Term

A. Education Program

Equity, Diversity, and Inclusion

We've made significant progress towards our Diversity, Equity, and Inclusion goals since 2018. From 2018-2022, we have continued to receive consistent training and guidance from contracted equity consultants. A DEI committee, composed of staff, teachers, and parents, was formed in 2020 to develop our Equity Lens, address equity issues before and as they arise, and create space to build community and foster learning. See **Appendix E** for our equity lens.

Our enrollment process was one of the equity concerns. With work from our DEI committee, the support of our board and the passage of SB 2954 in 2021, Cottonwood implemented a weighted lottery for the 2022.23 school year to give enrollment preference to historically underserved students.

With SIA funding we moved to hire a diversity, equity, inclusion, and belonging coordinator (DEIB). The DEIB coordinator will primarily focus on the retention of historically marginalized students and families,

while also co-creating a plan to expand community outreach. By cooperating with administrators and school leaders, the DEIB coordinator will apply racial equity tools, awareness, and expertise to professional development, strategic planning, and policy development. This includes participation in hiring teams, collaboration with CSCS staff in cultural event planning, and partnering with the fieldwork coordinator for outreach and curricular connections. As part of our mission, the DEIB coordinator also provides support and advocacy for students and families to build community and cultivate a sense of belonging for all students at Cottonwood. The DEIB coordinator and two of our classroom aides facilitate a BIPOC Affinity Club after school once a month. This affinity group exists to foster kinship; provide students of color a place to celebrate their uniqueness, gifts, and roles in our school community; and to affirm, protect, and nurture the identities of our students. This is the second school year hosting the BIPOC affinity space and we are working on having more affinity spaces in the near future.

Over the coming years, we would like to continue to diversify our student body and our faculty. In addition, we intend to continue to educate and train our teachers about how to create culturally responsive classrooms that are inclusive and promote success for all students. We look forward to more affinity spaces for our students and staff to participate in. We will continue to build diversity into our curriculum. We will continue to develop, use and strengthen our equity lens. A focus will be on providing more resources and support for LGBTQ+ students.

Plant Teachings

We began our new Plant Teachings program initiative last year at Cottonwood. When we were looking to replace our “character traits” program with something more in line with place based and indigenous studies curriculum, our Indigenous Educator Advisory group recommended we connect with GRuB, an organization which teaches social emotional skills through Pacific Northwest native plants.

We have slowly adopted this curriculum, focusing on just the Cottonwood tree last year. We started having quarterly staff trainings with GRuB to support our staff to build their own relationship with plants. This year we started learning about one plant per month. We learn facts about each plant and have infographic posters about the plant posted in each room. We also visit each plant and bring the plant inside our school and classrooms so we can start knowing and learning from the plants. There are social/emotional skills connected to each plant so we do activities related to that skill as well.

To give an example of what this looks like, our November plant is Douglas Fir. Students visited Douglas Fir trees and learned to identify them. We brought in branches and pine cones, our students used the needles as fidgets, we had fir spray for students to smell. The social emotional skill is Adapt, so we talked about how the Douglas Fir adapts and how we adapt too. Students set intentions about how they want to continue to grow and adapt. We have posters around the school reinforcing the concepts to students and families. We share recipes to make teas or other ways to use the plant. One of our 4th and 5th grade classes performed a play about Douglas Fir and co-wrote a song that they performed. Next month we will have another class lead an activity or create a plant-themed gift for the school. Each class is the keeper of one plant where they dig a little deeper, teach the rest of the school, and co-write the plant song that month with one of our musician teachers.

We have many plants in our native plant garden, which helps support a year round connection with and awareness of these plants. We also are encouraging families to learn with us through parent nights and newsletter blurbs. We want them to be able to reinforce this plant connection at home and enjoy the same benefits as their kids through an increased awareness of place and these plants in our community. We want to continue to build this garden as we build the program.

The plant teachings program offers us many additional opportunities to pursue in the future. We are now in a position to mentor other schools in the region who want to bring plant teachings into their curriculum. Springwater Environmental School has already expressed interest in such a partnership. We also may work more with GRuB in the future to disseminate information on how to bring the teachings into a school setting through presentations at conferences or other professional development settings. We recently were awarded a 3-year geography grant with the Gray Family Foundation focused on place-based education training and dissemination, and plan to center our plant teachings in this work. As part of this grant project, we plan to record and “release” a music album written and performed by our students based on our monthly plant teachings.

In general, our plan is to continue to deepen our relationship with plant teachers and recognize them as a vital part of our community. Native plants have lived in reciprocity with humans in this place for thousands of years and we see it as our responsibility to heal and nurture this relationship. Part of this commitment will mean finding ways to spend more time outside to be with and learn from our plant teachers.

Behavior Coach

We returned to in person learning with many students needing a higher level of support to participate in the rigor of an in-person school day. Therefore, this year we have a new position at Cottonwood, our behavior coach. The behavior coach provides daily behavioral support of students and professional development, oversight, and collaboration for the staff. This support is provided in coordination with our school counselor and diversity, equity, inclusion and belonging coordinator.

The Cottonwood School serves the whole child. When a student's behaviors are disruptive we wrap around the student to identify individual needs and find unique ways to support those needs. Our behavior coach and school counselor are developing a trauma-informed behavior vision and are working to develop a system of implementation for these practices in the classroom and school. The behavior coach provides daily services to students to support social and emotional wellness and academic success through promoting engagement and a sense of belonging in the school community. In alignment with our culturally responsive action items, the behavioral coach updates action plans with student/ family feedback, social-emotional supports, therapeutic interventions, and advocacy to improve educational outcomes for all students.

Our behavior coach is currently funded with ESSER funds and is a crucial part of the team that is identifying and working closely with students who need an intervention plan. We believe this new position will have a positive impact on everyone in our building from students to staff and are eager to watch it unfold. We hope to find funding to continue with this work and go deeper over the next few years by working more closely with families; providing parenting classes, affinity and support groups.

B. Financial Plans

1. See **Appendix F** for the 5-year projected budget. Key assumptions include: enrollment projected at 205 students annually (school current max is 210 students); the per student funding rate will increase at 3% annually; the charter adjustment to the student funding rate would remain at 90%; the poverty addition and capture rate would remain at the current rates of 8% and 25%, respectively; fundraising income will start at \$42,000 in FY 2024 and grow at \$2,500 per year; staff salaries will increase at 3% annually; PERS expense will be 20% of wages annually based on historical experience; insurance costs will grow at 8% annually; and general expenses will grow at 3% annually. Additionally, the school currently has a

building lease that runs through June 30, 2031 with a monthly rental rate of \$18,000 per month plus CAM charges. We assume that the monthly rent/CAM charge will increase to \$23,700 per month over the next 5 years.

2. We are prepared for the end of the ESSER III funding program and will reduce expenses as funding ends, primarily through a reduction in staffing.

C. Organizational Plan

1. There are no anticipated changes coming to the governance of the school. The bylaws for the school were amended in the spring of 2022 to reflect our current and preferred board composition and governance structure including 5-9 board members with co-chairs instead of a single chair. The committees are reviewed annually at our board retreat and modified or created as necessary to match the goals for the year.
2. We don't anticipate any major changes to the school's leadership or staffing model in the coming years. We continue to look for supplemental grant support to enable counseling, field-based activities, and equity-related activities and staffing. We currently do not contract with any Education Service Providers and don't anticipate doing so in the future.

The school's facilities are in good condition and are currently serving the school well. Our location in the South Waterfront of Portland, next to the river and adjacent to the streetcar line and downtown Portland, aligns well with the place-based mission of the school. Our lease runs until 2031. We continue to do annual upgrades and maintenance to the facility via our summer work day each year as well as a facility evaluation twice a year.

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The Cottonwood School of Civics and Science

A/P Aging Summary As of November 1, 2022

	CURRENT	1 - 30	31 - 60	61 - 90	91 AND OVER	TOTAL
Garden Raised Bounty	1,500.00					\$1,500.00
Laura Bracke(Reimb)	143.35					\$143.35
PERS	21,067.91					\$21,067.91
Ricoh USA Inc	723.13					\$723.13
Shannon (Aviva) McClure dba Our Turn	5,355.00					\$5,355.00
Southwest Charter School					0.00	\$0.00
TOTAL	\$28,789.39	\$0.00	\$0.00	\$0.00	\$0.00	\$28,789.39

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Remittance Statement

The Statement at a Glance

2

Employer 04409 - THE COTTONWOOD SCHOOL OF CIVICS AND SCIENCE
 Statement Period 10/06/2022 - 10/20/2022
 Remittance Due Date 10/27/2022

Type	Previous Balance	Current Period Activity	Ending Balance	Amount Due
IAP	\$4,085.39	(\$4,085.39)	\$0.00	\$0.00
Pension	\$16,150.88	(\$16,150.88)	\$0.00	\$0.00
RHIA	(\$155.92)	\$0.00	(\$155.92)	\$0.00

Total Amount Due \$0.00

If current period activity is zero or less, no amount will be charged to the employer. Any credits will be applied to the next statement.

For assistance, contact the Employer Service Center at 888-320-7377 or PERS.EDX.Support@pers.oregon.gov.

IAP

IAP Beginning Balance

\$4,085.39

Deposits

Date Posted	Deposit Date	Payment Method	Description	Amount
10/13/2022	10/12/2022	ACH Debit (Pull)	Employer IAP Remittances (\$4,085.39)	

Deposit Total

(\$4,085.39)

Invoices

Date Posted	Invoice Description	Amount
10/10/2022	1531196 Contributions Pension	\$237.50
10/10/2022	1531197 Contributions Pension	\$237.50

Invoice Total

\$0.00

IAP Ending Balance \$0.00

Pension

Pension Beginning Balance

\$16,150.88

Deposits

Date Posted	Deposit Date	Payment Method	Description	Amount
10/13/2022	10/12/2022	ACH Debit (Pull)	Employer Pension Remittances (\$16,150.88)	

Deposit Total

(\$16,150.88)

Invoices

Date Posted	Invoice Description	Amount
10/10/2022	1531196 Contributions Pension	\$314.29

10/10/2022	1531197	Contributions Pension (\$314.29)	
10/10/2022	1531198	UAL Contributions	\$624.63
10/10/2022	1531199	UAL Contributions	(\$624.63)
			123

Invoice Total \$0.00

Pension Ending Balance \$0.00

RHIA

RHIA Beginning Balance (\$155.92)

Deposits

Date Posted	Deposit Date	Payment Method	Description	Amount
-------------	--------------	----------------	-------------	--------

There are no RHIA deposits found for the given period.

Deposit Total \$0.00

Invoices

Date Posted	Invoice Description	Amount
-------------	---------------------	--------

There are no RHIA invoices found for the given period.

Invoice Total \$0.00

RHIA Ending Balance (\$155.92)

Tell Me More

- IAP: Includes 6% Individual Account Program (IAP) contributions and voluntary contributions, if applicable, for active members.
 - Post 2004 IAP Prior Year Earnings (PYE) invoices do not have hyperlinks. These invoices are mailed to each employer.
- Pension: Includes normal cost and Unfunded Actuarial Liability (UAL) for active and retired members, plus side account credits, if applicable.
 - Pre 2004 Prior Year Earnings (PYE) invoices will display under the Pension section with a hyperlink to view invoice details.
 - The Social Security invoice is an annual fee. The fee is based on the number of employees with social security wages.
- RHIA: Includes normal cost (PERS only) and UAL rate, if applicable, for all active and retired members.
- RHIPA: Includes normal cost (PERS only) and UAL rate for state agencies and judiciary.

The Cottonwood School of Civics and Science

Statement of Financial Position

As of October 31, 2022

	TOTAL				
	AS OF OCT 31, 2022	AS OF SEP 30, 2022 (PP)	CHANGE	AS OF OCT 31, 2021 (PY)	CHANGE
ASSETS					
Current Assets					
Bank Accounts					
1000 Cash and Investments	0.00	0.00	0.00	0.00	0.00
1001 Heritage Gen Oper. Acct 175	693,995.64	756,467.03	-62,471.39	349,601.81	344,393.83
1002 Heritage Funding Acct 191	-30,423.09	139,813.18	-170,236.27	330,197.84	-360,620.93
2021 surplus	228,708.75	228,708.75	0.00	228,708.75	0.00
Total 1002 Heritage Funding Acct 191	198,285.66	368,521.93	-170,236.27	558,906.59	-360,620.93
1003 Heritage Reserves Acct 208	527,840.81	527,645.81	195.00	518,644.56	9,196.25
1010 Petty Cash	100.00	100.00	0.00	100.00	0.00
Total 1000 Cash and Investments	1,420,222.11	1,652,734.77	-232,512.66	1,427,252.96	-7,030.85
Total Bank Accounts	\$1,420,222.11	\$1,652,734.77	\$ -232,512.66	\$1,427,252.96	\$ -7,030.85
Accounts Receivable					
1200 Accounts receivable	38,377.33	30,237.00	8,140.33	197,666.77	-159,289.44
Total Accounts Receivable	\$38,377.33	\$30,237.00	\$8,140.33	\$197,666.77	\$ -159,289.44
Other Current Assets					
1300 Prepaid Expenses	0.00	0.00	0.00	0.00	0.00
Prepaid Auction	0.00	0.00	0.00	300.00	-300.00
Prepaid Insurance	0.00	0.00	0.00	0.00	0.00
Prepaid Misc	0.00	0.00	0.00	0.00	0.00
Prepaid School supplies	0.00	0.00	0.00	0.00	0.00
Total 1300 Prepaid Expenses	0.00	0.00	0.00	300.00	-300.00
1400 Undeposited Funds	2,639.45	175.00	2,464.45	1,875.00	764.45
1900 Payroll Asset	0.00	0.00	0.00	0.00	0.00
Employee Advance	1,500.00	1,500.00	0.00	0.00	1,500.00
accidental credit card charge	0.00	0.00	0.00	0.00	0.00
Total Employee Advance	1,500.00	1,500.00	0.00	0.00	1,500.00
xx Scrip Inventory	0.00	0.00	0.00	0.00	0.00
Total Other Current Assets	\$4,139.45	\$1,675.00	\$2,464.45	\$2,175.00	\$1,964.45
Total Current Assets	\$1,462,738.89	\$1,684,646.77	\$ -221,907.88	\$1,627,094.73	\$ -164,355.84
Fixed Assets					
1500 Fixed Assets					
Accum Dep-Fixed Asset	0.00	0.00	0.00	0.00	0.00
Furniture & Fixtures					
2022 Outdoor Eating Tent	11,351.42	11,351.42	0.00	11,351.42	0.00
Total Furniture & Fixtures	11,351.42	11,351.42	0.00	11,351.42	0.00
Leasehold Improvements					
Leasehold Improvements	61,535.15	61,535.15	0.00	61,535.15	0.00
Leasehold - Accum Depr	-37,221.25	-37,221.25	0.00	-31,306.25	-5,915.00
Total Leasehold Improvements	24,313.90	24,313.90	0.00	30,228.90	-5,915.00
Machinery and Equipment					
Computers & Computer Hardware	1,458.85	1,458.85	0.00	1,458.85	0.00
Computers - Accum Depr	-1,458.85	-1,458.85	0.00	-1,458.85	0.00

The Cottonwood School of Civics and Science

Statement of Financial Position

As of October 31, 2022

	TOTAL				
	AS OF OCT 31, 2022	AS OF SEP 30, 2022 (PP)	CHANGE	AS OF OCT 31, 2021 (PY)	CHANGE
Total Computers & Computer Hardware	0.00	0.00	0.00	0.00	0.00
Office Equipment	33,448.11	33,448.11	0.00	33,448.11	0.00
Office Equipment - Accum Depr	-33,448.11	-33,448.11	0.00	-33,448.11	0.00
Total Office Equipment	0.00	0.00	0.00	0.00	0.00
Playground Fixtures & Equipment	41,298.00	41,298.00	0.00	41,298.00	0.00
Playground - Accumulated Depreciation	-40,776.00	-40,776.00	0.00	-38,022.00	-2,754.00
Total Playground Fixtures & Equipment	522.00	522.00	0.00	3,276.00	-2,754.00
Total Machinery and Equipment	522.00	522.00	0.00	3,276.00	-2,754.00
Total 1500 Fixed Assets	36,187.32	36,187.32	0.00	44,856.32	-8,669.00
Total Fixed Assets	\$36,187.32	\$36,187.32	\$0.00	\$44,856.32	\$ -8,669.00
Other Assets					125
1600 Deposits	17,500.00	17,500.00	0.00	18,213.75	-713.75
Total Other Assets	\$17,500.00	\$17,500.00	\$0.00	\$18,213.75	\$ -713.75
TOTAL ASSETS	\$1,516,426.21	\$1,738,334.09	\$ -221,907.88	\$1,690,164.80	\$ -173,738.59
LIABILITIES AND EQUITY					
Liabilities					
Current Liabilities					
Accounts Payable					
2000 Accounts payable	5,831.74	33,127.43	-27,295.69	31,345.73	-25,513.99
Total Accounts Payable	\$5,831.74	\$33,127.43	\$ -27,295.69	\$31,345.73	\$ -25,513.99
Credit Cards					
2100 Credit Cards	0.00	0.00	0.00	0.00	0.00
9253 Heritage CC 9253 Amanda McAdoo	443.78	6,403.22	-5,959.44	2,709.00	-2,265.22
9261 Heritage CC 9261 Sarah Anderson	576.50	1,469.03	-892.53	426.99	149.51
Total 2100 Credit Cards	1,020.28	7,872.25	-6,851.97	3,135.99	-2,115.71
Total Credit Cards	\$1,020.28	\$7,872.25	\$ -6,851.97	\$3,135.99	\$ -2,115.71
Other Current Liabilities					
2200 Unearned Revenue	0.00	0.00	0.00	0.00	0.00
McKenzie School Unearned Rev	2,597.12	2,597.12	0.00	2,597.12	0.00
Portland ARTS Tax	0.00	0.00	0.00	0.00	0.00
SIA Funds Unearned Rev	0.00	0.00	0.00	1,348.70	-1,348.70
Total 2200 Unearned Revenue	2,597.12	2,597.12	0.00	3,945.82	-1,348.70
2300 Special Operating Funds					
ASE Club Teacher's Fund	0.00	0.00	0.00	0.00	0.00
FOCSCS Operating Funds	3,000.00	3,000.00	0.00	3,000.00	0.00
Scholarship Fund	2,815.93	2,815.93	0.00	2,815.93	0.00
Student Council Funds	81.00	81.00	0.00	81.00	0.00
Student Plays	8,523.21	8,523.21	0.00	8,523.21	0.00



PAULY, ROGERS, AND Co., P.C.
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INDEPENDENT AUDITORS' REPORT

To the Board of Directors
 The Cottonwood School of Civics and Science
 Portland, Oregon

June 29, 2022

Report on the Financial Statements

We have audited the accompanying basic financial statements of the governmental activities and major fund of The Cottonwood School of Civics and Science, (the School) as of and for the year ended June 30, 2021, and the related notes to the basic financial statements, which collectively comprise the basic financial statements as listed in the table of contents.

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Management's Responsibility for the Financial Statements

Management is responsible for the preparation and fair presentation of these basic financial statements in accordance with accounting principles generally accepted in the United States of America; this includes the design, implementation, and maintenance of internal control relevant to the preparation and fair presentation of basic financial statements that are free from material misstatement, whether due to fraud or error.

Auditors' Responsibility

Our responsibility is to express opinions on these basic financial statements based on our audit. We conducted our audit in accordance with auditing standards generally accepted in the United States of America. Those standards require that we plan and perform the audit to obtain reasonable assurance about whether the basic financial statements are free from material misstatement.

An audit involves performing procedures to obtain audit evidence about the amounts and disclosures in the basic financial statements. The procedures selected depend on the auditors' judgment, including the assessment of the risks of material misstatement of the basic financial statements, whether due to fraud or error. In making those risk assessments, the auditor considers internal control relevant to the preparation and fair presentation of the basic financial statements in order to design audit procedures that are appropriate in the circumstances, but not for the purpose of expressing an opinion on the effectiveness of the internal control. Accordingly, we express no such opinion. An audit also includes evaluating the appropriateness of accounting policies used and the reasonableness of significant accounting estimates made by management, as well as evaluating the overall presentation of the basic financial statements.

We believe that the audit evidence we have obtained is sufficient and appropriate to provide a basis for our audit opinions.

Opinions

In our opinion, the basic financial statements referred to above present fairly, in all material respects, the respective financial position of the governmental activities and major fund of The Cottonwood School of Civics and Science, as of June 30, 2021, and the respective changes in financial position thereof for the year then ended in accordance with accounting principles generally accepted in the United States of America.

Other Matters

Required Supplementary Information

Accounting principles generally accepted in the United States of America require that the required supplementary information, as listed in the table of contents, be presented to supplement the basic financial statements. Such information, although not a part of the basic financial statements, is required by the Governmental Accounting Standards Board, who considers it to be an essential part of financial reporting for placing the basic financial statements in an appropriate operational, economic, or historical context. We have applied certain limited procedures to the required supplementary information in accordance with auditing standards generally accepted in the United States of America, which consisted of inquiries of management about the methods of preparing the information and comparing the information for consistency with management's responses to our inquiries, the basic financial statements, and other knowledge we obtained during our audit of the basic financial statements. We do not express an opinion or provide any assurance on the Schedules of Net Pension Liability and Contributions for PERS, or the schedules of Net OPEB Asset/(Liability) for RHIA, or the Management's Discussion and Analysis because the limited procedures do not provide us with sufficient evidence to express an opinion or provide any assurance on them.

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Other Information

Our audit was conducted for the purpose of forming opinions on the financial statements that collectively comprise the basic financial statements. The listing of board members, located before the table of contents, and the other information, as listed in the table of contents, are not a required part of the basic financial statements and have not been subjected to the auditing procedures applied in the audit of the basic financial statements and, accordingly, we do not express an opinion or provide any assurance on them.

Report on Other Legal and Regulatory Requirements

In accordance with Minimum Standards for Audits of Oregon Municipal Corporations, we have issued our report dated June 29, 2022 on our consideration of compliance with certain provisions of laws and regulations, including the provisions of Oregon Revised Statutes as specified in Oregon Administrative Rules. The purpose of that report is to describe the scope of our testing of compliance and the results of that testing and not to provide an opinion on compliance.



ROY R. ROGERS, CPA
PAULY, ROGERS AND CO., P.C.



THE COTTONWOOD SCHOOL
— OF CIVICS AND SCIENCE —

MANAGEMENT'S DISCUSSION AND ANALYSIS
For the year ended June 30, 2021

As management of The Cottonwood School of Civics and Science (CSCS), we offer the following narrative overview and analysis of CSCS's basic financial statements for the year ending June 30, 2021. It is management's goal, in preparing this discussion, to assist users of these financial statements in interpreting key data found in the pages that follow, and to analyze the results of this fiscal year. Because the information contained in this discussion is a brief overview, it should be read and interpreted only in conjunction with those financial statements. 128

Overview of the Financial Statements

This discussion and analysis is intended to serve as an introduction to CSCS's basic financial statements which consist of the following:

- Government-wide financial statements
- Fund financial statements
- Notes to the basic financial statements

Government-wide financial statements are designed to provide an overview of CSCS's financial operations, in a manner similar to a private sector business. All activities are presented on the full accrual basis of accounting, in which they are reported as soon as the event occurs, regardless of the timing of associated cash flows.

- The *Statement of Net Position* presents information regarding all assets and liabilities, with the difference being reported as net position. Changes in net position may serve as a useful indicator of whether or not the overall financial position of CSCS is improving or deteriorating.
- The *Statement of Activities* presents how CSCS's net position increased or decreased during the year under audit.

Governmental Fund financial statements.

The fund financial statements are presented focusing on near-term inflows and outflows of available resources, as well as balances of available resources at the end of the year. Balance Sheet – Governmental Funds; Reconciliation of the Governmental Fund Balance Sheet to the Statement of Net Position; Statement of Revenues, Expenditures and Changes in Fund Balance –Governmental Funds; and Reconciliation of the Statement of Revenues, Expenditures and Changes in Fund Balance of Governmental Funds to the Statement of Activities and Changes in Net Position together provide a support and reconciliation between *government-wide financial statements* and *government fund financial statements*.

Notes to basic financial statements. The notes provide additional information that is essential to a complete understanding of the data provided in the government-wide and funds financial statements.

Required Supplementary Information. The information in this section is required by the Governmental Accounting Standards Board (GASB). It consists of the Management’s Discussion and Analysis (MD&A) and required pension information.

Government-wide financial analysis. A comparison of current year to prior year government wide financial statements is shown in the Table 1 (Revenue & Expense Comparison) and Table 2 (Assets & Liabilities Comparison) below.

Table 1 – Revenue & Expense Comparison – 2021 vs 2020

	<u>2021</u>	<u>2020</u>	<u>% Change</u>
Revenues			
Charges for services	\$ 31,241	\$ 10,958	185.1%
Operating contributions	238,357	97,564	144.3%
General revenues	<u>1,718,227</u>	<u>1,711,068</u>	<u>0.4%</u>
Total Revenues	<u>1,987,825</u>	<u>1,819,590</u>	<u>9.2%</u>
Expenses			
Instruction	1,170,414	743,331	57.5%
Support services	<u>835,274</u>	<u>552,377</u>	<u>51.2%</u>
Total Expenses	<u>2,005,688</u>	<u>1,295,708</u>	<u>54.8%</u>
Change in Net Position	(17,863)	523,882	-103.4%
Beginning Net Position	<u>366,872</u>	<u>(157,010)</u>	<u>333.7%</u>
Ending Net Position	<u>\$ 349,009</u>	<u>\$ 366,872</u>	<u>-4.9%</u>

Table 2 – Assets & Liabilities Comparison – 2021 vs 2020

	2021	2020	% Change
Assets			
Current and other assets	\$ 1,675,674	\$ 1,095,544	53.0%
Net OPEB Asset - RHIA	7,402	11,911	-37.9%
Capital assets (net)	35,949	43,399	-17.2%
Total Assets	1,719,025	1,150,854	49.4%
Deferred Outflows of Resources			
Pension related deferrals - PERS	1,610,720	417,584	285.7%
Pension related deferrals - RHIA	3,404	-	-%
Total Outflows of Resources	1,614,124	417,584	286.5%
Liabilities			
Current and other liabilities	456,072	207,125	120.2%
Net pension liability - PERS	1,919,350	179,132	971.5%
Total Liabilities	2,375,422	386,257	515.0%
Deferred Inflows of Resources			
Pension related deferrals - PERS	607,532	812,895	-25.3%
Pension related deferrals - RHIA	1,186	2,414	-50.9%
Total Inflows of Resources	608,718	815,309	-25.3%
Net Position			
Net investment in capital assets	35,949	43,399	-17.2%
Restricted for Net OPEB Asset -RHIA	7,402	11,911	-37.9%
Restricted – Portland Arts Tax program	-	16,638	-100.0%
Unrestricted	305,658	294,924	-3.6%
Total Net Position	\$ 349,009	\$ 366,872	4.9%

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Analysis of the government-wide financial statements (including Tables 1 and 2) shows the overall financial position of the school did not improve during the audit year, reflecting an increase in operating expenses.

- Total revenues increased over nine percent from the prior year audited financial statements, driven primarily by an increase in operating contributions. The primary driver behind the operating contributions increase was due to increases in grant activities and state funding.
- Total expenses increased 55 percent from the prior year audited financial statements due to increases in operating costs resulting from instructional and support services added to support return to school and COVID-19 related management.

Analysis of the general fund balances shows an increase over the prior year balances due to the increases in grant activities, including ESSER funding, and state funding.

Analysis of general fund budgetary variations.

- Revenues were approximately 26% over budget for the year (\$420,411). The drivers for this increase were new and increased federal grant funding through increased grant activities and increased state funding due to rate increases.
- Expenses were approximately 3% over budget (\$49,469). The drivers for this increase were an increase in salaries and supplies and materials resulting from changes to school operations due to COVID-19 offset by a decrease in payroll costs and employee benefits as well as purchased services.

Description of capital asset and long-term debt activity.

- Cottonwood did not purchase any capital assets nor did it incur long-term debt during the year. Enrollment for the 2020-21 school year averaged 205, consistent with the prior year.

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The financial report is designed to provide a general overview of finances for those with an interest in CSCS's finances. Questions concerning any of the information provided in this report, or request for additional financial information should be addressed to: Board President, 640 S. Bancroft Street, Portland, OR 97239.



Nels Hesseldahl
Board President, The Cottonwood School



Nicki Phelps
Board Treasurer, The Cottonwood School



Amanda McAdoo
Executive Director, The Cottonwood School

THE COTTONWOOD SCHOOL OF CIVICS AND SCIENCE
PORTLAND, OREGON

BASIC FINANCIAL STATEMENTS

THE COTTONWOOD SCHOOL OF CIVICS AND SCIENCE
PORTLAND, OREGON

STATEMENT OF NET POSITION
 June 30, 2021

ASSETS:	
Current Assets:	
Cash	\$ 1,559,477
Accounts receivable	97,608
Prepaid expenses	<u>1,089</u>
Total Current Assets	<u>1,658,174</u>
Noncurrent Assets:	
Deposits	17,500
Net OPEB Asset - RHIA	7,402
Capital assets, net of depreciation	<u>35,949</u>
Total Long-Term Assets	<u>60,851</u>
Total Assets:	1,719,025
DEFERRED OUTFLOWS OF RESOURCES:	
Pension related deferrals - PERS	1,610,720
OPEB related deferrals - RHIA	<u>3,404</u>
Total Deferred Outflows of Resources	<u>1,614,124</u>
TOTAL ASSETS AND DEFERRED OUTFLOWS OF RESOURCES	<u>3,333,149</u>
LIABILITIES:	
Current Liabilities:	
Accounts payable	\$ 32,674
Unearned Revenue	32,574
Payroll liabilities	104,478
Other liabilities	57,637
PPP Loan	<u>228,709</u>
Total Current Liabilities	<u>456,072</u>
Noncurrent Liabilities:	
Net pension liability - PERS	<u>1,919,350</u>
Total Long-Term Liabilities	<u>1,919,350</u>
Total Liabilities:	2,375,422
DEFERRED INFLOWS OF RESOURCES:	
Pension related deferrals - PERS	607,532
OPEB related deferrals - RHIA	<u>1,186</u>
Total Deferred Inflows of Resources	<u>608,718</u>
TOTAL LIABILITIES AND DEFERRED INFLOWS OF RESOURCES	<u>2,984,140</u>
NET POSITION:	
Net Investment in Capital Assets	35,949
Restricted for Net OPEB Asset - RHIA	7,402
Unrestricted	<u>305,658</u>
TOTAL NET POSITION	<u>\$ 349,009</u>

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THE COTTONWOOD SCHOOL OF CIVICS AND SCIENCE
PORTLAND, OREGON

STATEMENT OF ACTIVITIES
for the Year Ended June 30, 2021

FUNCTIONS	EXPENSES	PROGRAM REVENUES		NET (EXPENSE) REVENUE AND CHANGES IN NET POSITION
		CHARGES FOR SERVICES	OPERATING GRANTS AND CONTRIBUTIONS	
Instruction	\$ 1,170,414	\$ 31,241	\$ 237,607	\$ (901,566)
Support Services	835,274	-	750	(834,524)
Total Governmental Activities	<u>\$ 2,005,688</u>	<u>\$ 31,241</u>	<u>\$ 238,357</u>	<u>(1,736,090)¹³⁴</u>

General Revenues	
State School Fund	1,702,350
Arts Tax	15,204
Miscellaneous	673
Total General Revenues	<u>1,718,227</u>
Changes in Net Position	(17,863)
Net Position - Beginning	<u>366,872</u>
Net Position - Ending	<u>\$ 349,009</u>

See accompanying notes to the basic financial statements.

THE COTTONWOOD SCHOOL OF CIVICS AND SCIENCE
PORTLAND, OREGON

BALANCE SHEET - GOVERNMENTAL FUNDS
June 30, 2021

ASSETS:

Cash	\$	1,559,477
Accounts receivable		97,608
Prepaid expenses		1,089
		<hr/>
Total Assets	\$	1,658,174
		<hr/> <hr/>

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LIABILITIES:

Accounts payable	\$	32,674
Payroll liabilities		104,478
Unearned Revenue		32,574
		<hr/>
Total Liabilities		169,726
		<hr/>

FUND BALANCES:

Nonspendable		1,089
Assigned		14,450
Unassigned		1,472,909
		<hr/>
Total Fund Balance		1,488,448
		<hr/>
Total Liabilities and Fund Balance	\$	1,658,174
		<hr/> <hr/>

See accompanying notes to the basic financial statements.

THE COTTONWOOD SCHOOL OF CIVICS AND SCIENCE
PORTLAND, OREGON

RECONCILIATION OF THE GOVERNMENTAL FUND
 BALANCE SHEET TO THE STATEMENT OF NET POSITION
 June 30, 2021

Total Fund Balances - Governmental Fund		\$ 1,488,448
<p>The net pension asset (liability) is the difference between the total pension liability and the assets set aside to pay benefits earned to past and current employees and beneficiaries.</p>		
PERS	\$ (1,919,350)	
RHIA	<u>7,402</u>	(1,911,948)
<p>Deferred inflows and outflows of resources related to the pension plan include differences between expected and actual experience, changes of assumptions, differences between projects and actual earnings, and contributions subsequent to the measurement date.</p>		
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Deferred Inflows of Resources - PERS	(607,532)	
Deferred Outflows of Resources - PERS	1,610,720	
Deferred Inflows of Resources - RHIA	(1,186)	
Deferred Outflows of Resources - RHIA	<u>3,404</u>	1,005,406
<p>The cost of capital assets (leasehold improvements and equipment) purchased or constructed is reported as an expenditure in the governmental fund. The Statement of Net Position includes those capital assets among the assets of the School as a whole.</p>		
Capital assets, net of depreciation		35,949
<p>Refundable rental deposits paid on a long-term lease contract, not receivable in the current period, are reported as an expenditure in the governmental fund. The Statement of Net Position includes those deposits among the assets of the School as a whole.</p>		
Deposit		17,500
<p>Long-term liabilities applicable to the School's governmental activities are not due and payable in the current period and accordingly are not reported as fund liabilities. All liabilities, both current and long term, are reported in the Statement of Net Position.</p>		
PPP Loan payable		(228,709)
Other Liabilites		<u>(57,637)</u>
Net Position		<u>\$ 349,009</u>

See accompanying notes to the basic financial statements.

THE COTTONWOOD SCHOOL OF CIVICS AND SCIENCE
PORTLAND, OREGON

STATEMENT OF REVENUES, EXPENDITURES AND CHANGES IN FUND BALANCE
GOVERNMENTAL FUND
for the Year Ended June 30, 2021

	2021
REVENUES:	
State aid	\$ 1,717,972
Federal aid	141,901
Other grants	51,337
Fees and charges	31,241
Contributions	36,295
In-Kind Contributions	750
Fundraising	50,088
Miscellaneous	674
City art tax	15,204
	2,045,462
Total Revenues	
EXPENDITURES:	
Current:	
Instruction	
Salaries	537,502
Payroll costs and employee benefits	247,640
Purchased services	43,328
Supplies and materials	113,706
Total Instruction	942,176
Support Services	
Salaries	242,920
Payroll costs and employee benefits	112,038
Purchased services	330,342
Supplies and materials	14,470
Other objects	25,624
Total Support Services	725,394
Total Expenditures	1,667,570
Other Financing Sources/(Uses)	
Proceeds from the issuance of debt	228,709
Total Other Financing Sources/(Uses)	228,709
Net Change in Fund Balance	606,601
Beginning Fund Balance	881,847
Ending Fund Balance	\$ 1,488,448

See accompanying notes to the basic financial statements.

THE COTTONWOOD SCHOOL OF CIVICS AND SCIENCE
PORTLAND, OREGON

RECONCILIATION OF THE GOVERNMENTAL FUND
 STATEMENT OF REVENUES, EXPENDITURES
 TO THE STATEMENT OF ACTIVITIES
 for the Year Ended June 30, 2021

Total Net Changes in Fund Balances - Governmental Funds \$ 606,601

The PERS pension expense represents the changes in net pension asset (liability) from year to year due to changes in total pension liability and the fair value of pension plan net position available to pay pension benefits.

PERS	\$ (341,719)	
RHIA	123	(341,596)
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Capital outlays are reported in the governmental fund as expenditures. However, in the Statement of Activities, the cost of those assets is capitalized and allocated over their estimated useful lives as depreciation expense. This is the amount by which capital outlay exceeds depreciation.

Depreciation expense, net of adjustments	(7,450)
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Governmental funds report payments on deferred lease liability and payments on capital leases as expenditures, whereas these amounts are a reduction of long-term debt on the Statement of Net Position. Governmental funds report lease payments as an expense regardless of abated months or increasing annual rates, whereas the Statement of Net Position recognizes the difference between the lease payment and lease expense as a liability.

Deferred lease expense	10,928
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Long-term debt proceeds are reported as other financing sources in governmental funds. In the Statement of Net Position, however, issuing long-term debt increases liabilities not revenue.

Other Liabilities	(57,637)
Debt Principal Issuance (PPP)	(228,709)

Change in Net Position of Governmental Activities	\$ (17,863)
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THE COTTONWOOD SCHOOL OF CIVICS AND SCIENCE
PORTLAND, OREGON

NOTES TO THE BASIC FINANCIAL STATEMENTS

THE COTTONWOOD SCHOOL OF CIVICS AND SCIENCE
PORTLAND, OREGON

NOTES TO THE BASIC FINANCIAL STATEMENTS

I. SUMMARY OF SIGNIFICANT ACCOUNTING POLICIES

The basic financial statements have been prepared in conformity with accounting principles generally accepted in the United States of America (GAAP) as applied to government units as required by Oregon law. The Governmental Accounting Standards Board (GASB) is the accepted standard-setting body for establishing governmental accounting and financial reporting principles. The more significant of the accounting policies are described below.

A. THE FINANCIAL REPORTING ENTITY

The Cottonwood School of Civics and Science (the School) is a non-profit corporation organized under provisions of Oregon Revised Statutes Chapter 338 for the purpose of operating a charter school, which provides youth education and activities for students in the greater Portland area. It is governed by a board of directors. Support comes from local school districts, government and private grantors, and program fees.¹⁴⁰

Generally accepted accounting principles require that these basic financial statements present The Cottonwood School of Civics and Science and all component units, if any. Component units, as established by the Governmental Accounting Standards Board (GASB) Statement 61, are separate entities which are included in the School's reporting because of the significance of their operational or financial relationships with the School. All significant activities and entities with which the School exercises oversight responsibility have been considered for inclusion in the basic financial statements. There are no component units.

The School operates under a charter granted by the Oregon Department of Education. Its continuation is contingent upon compliance with various requirements as specified in both the charter and Chapter 338 of the Oregon Revised Statutes (ORS). The School is not a component unit of any school district as it is sponsored by the Oregon Department of Education.

B. MEASUREMENT FOCUS, BASIS OF ACCOUNTING AND BASIS OF PRESENTATION

GOVERNMENT-WIDE FINANCIAL STATEMENTS (GWFS)

The Statement of Net Position and Statement of Activities display information about the School as a whole.

The Statement of Net Position and the Statement of Activities were prepared using the economic resources measurement focus and the accrual basis of accounting. Revenues, expenses, gains, losses, assets, and liabilities resulting from exchange and exchange-like transactions are recognized when the exchange takes place. Revenues, expenses, gains, losses, assets, and liabilities resulting from non-exchange transactions are recognized in accordance with the requirements of GASB Statement No. 33 "Accounting and Financial Reporting for Non-Exchange Transactions".

All direct expenses are reported by function in the Statement of Activities. Direct expenses are those that are clearly identifiable with a function.

FUND FINANCIAL STATEMENTS

The accounts are organized and operated on the basis of funds. A fund is an independent fiscal and accounting entity with a self-balancing set of accounts. Fund accounting segregates funds according to their intended purpose and is used to aid management in demonstrating compliance with finance-related legal and contractual provisions. The minimum number of funds is maintained consistent with legal and managerial requirements.

THE COTTONWOOD SCHOOL OF CIVICS AND SCIENCE
PORTLAND, OREGON

NOTES TO THE BASIC FINANCIAL STATEMENTS

1. SUMMARY OF SIGNIFICANT ACCOUNTING POLICIES (CONTINUED)

B. MEASUREMENT FOCUS, BASIS OF ACCOUNTING AND BASIS OF PRESENTATION
(CONTINUED)

GOVERNMENTAL FUND TYPES

Governmental funds are used to account for the general government activities. Governmental fund types use the flow of current financial resources measurement focus and the modified accrual basis of accounting. Under the modified accrual basis of accounting, revenues are recognized when susceptible to accrual (i.e., when they are “measurable and available”). “Measurable” means the amount of the transaction can be determined and “available” means collectible within the current period or soon enough thereafter to pay liabilities of the current period, which is 60 days. Grant revenue is not considered available and, therefore, is not recognized until received. Expenditures are recorded when the liability is incurred. Capital assets and the related depreciation expense and accumulated depreciation are not reported in the governmental funds.

Revenues susceptible to accrual are federal, state and local shared revenue.

There is the following major governmental fund:

GENERAL FUND

This fund accounts for all financial resources and expenditures, except those required to be accounted for in another fund (there are no other funds). The principal revenue sources are payments of state school support from the state, federal grants, program fees, fundraising and donations.

GRANTS

Unreimbursed expenditures due from grantor agencies are reflected in the government-wide financial statements as receivables and revenues. Grant revenues are recorded at the time eligible expenditures are incurred. Cash received from grantor agencies in excess of related grant expenditures is recorded as a liability in the balance sheet and statement of net position.

NET POSITION

Net position is comprised of the various net earnings from operations, non-operating revenues, expenses and contributions of capital. Net position is classified in the following categories:

Restricted – consists of external constraints placed on assets use by creditors, grantors, contributors, or laws or regulations of other governments or constraints imposed by law through constitutional provisions or enabling legislation. There was restricted net position at June 30, 2021 representing the Net OPEB Asset – RHIA.

Net investment in capital assets – consists of assets that are invested in equipment and other capital assets net of depreciation and any related debt.

Unrestricted – consists of all other assets that are not included in the other categories previously mentioned.

THE COTTONWOOD SCHOOL OF CIVICS AND SCIENCE
PORTLAND, OREGON

NOTES TO THE BASIC FINANCIAL STATEMENTS

I. SUMMARY OF SIGNIFICANT ACCOUNTING POLICIES (CONTINUED)

C. BUDGET

A budget is prepared for the General Fund on the modified accrual basis of accounting in the main program categories as listed below. Modified accrual basis differs from accrual in the fact that no depreciation expense is recognized, pension costs are not recorded until paid, rent related to future periods is not deferred, capital leases are not recognized, debt principal is expensed when paid and capital assets are expensed when purchased.

Expenditures are made at the following levels for the fund:

LEVEL OF CONTROL

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- Salaries
- Payroll costs and employee benefits
- Purchased services
- Supplies and materials
- Other objects

A budgetary schedule is shown on page 30 of this report.

D. RECEIVABLES

Revenues earned during the year but not received by the end of the year are reported on the Statement of Net Position or the Balance Sheet as receivables. Such receivables are kept on the books until either received or written-off as uncollectible. Accounts receivable are all current and considered by management to be fully collectible; therefore, no provision for uncollectible accounts has been made.

E. CAPITAL ASSETS

Capital assets, which include leasehold improvements and equipment, are reported on the government-wide financial statements. Capital assets are defined as assets with an initial cost of more than \$5,000 and estimated useful lives in excess of one year. Purchased assets are recorded at historical cost or estimated historical cost. Donated capital assets are recorded at their estimated fair market value on the day donated. The costs of normal maintenance and repairs that do not add function to the asset or materially extend the useful life of the asset are expensed as incurred. Capital assets are depreciated on the straight line method over their estimated useful life. Equipment is depreciated over 3 to 5 years and leasehold improvements are depreciated over 10 to 20 years.

F. RETIREMENT PLANS

Substantially all of the School's employees are participants in the State of Oregon Public Employees Retirement System (PERS). For the purpose of measuring the net pension liability, deferred outflows of resources and deferred inflows of resources related to pensions, and pension expense, information about fiduciary net position of PERS and additions to/deductions from PERS's fiduciary net position have been determined on the same basis as they are reported by PERS. For this purpose, benefit payments (including refunds of employee contributions) are recognized when due and payable in accordance with the benefit terms. Investments are reported at fair value.

THE COTTONWOOD SCHOOL OF CIVICS AND SCIENCE
PORTLAND, OREGON

NOTES TO THE BASIC FINANCIAL STATEMENTS

1. SUMMARY OF SIGNIFICANT ACCOUNTING POLICIES, (CONTINUED)

G. DEFERRED OUTFLOWS / INFLOWS OF RESOURCES

In addition to assets, the basic financial statements will sometimes report a separate section for deferred outflows of resources. This separate financial statement element, *deferred outflows of resources*, represents a consumption of net position that applies to a future period(s) and so will not be recognized as an outflow of resources (expense / expenditure) until then. At June 30, 2021, there were deferred outflows representing PERS pension related deferrals and PERS OPEB-RHIA related deferrals reported in the Statement of Net Position.

In addition to liabilities, the basic financial statements will sometimes report a separate section for deferred inflows of resources. This separate financial statement element, *deferred inflows of resources*, represents an acquisition of net position that applies to a future period(s) and so will not be recognized as an inflow of resources (revenue) until that time. At June 30, 2021, there were deferred inflows representing PERS pension related deferrals and PERS OPEB-RHIA related deferrals reported in the Statement of Net Position.

H. STATE SCHOOL FUND

Pursuant to ORS 338.155, students of a public charter school are considered to be residents of the school district in which the public charter school is located. The number of full-time equivalent students and related data is reported to the Oregon Department of Education and Portland Public Schools (PPS). A representative from the Oregon Department of Education reviews the data received. The charter school agreement between the Oregon Department of Education and The Cottonwood School of Civics and Science determines the percentage of funding received for full-time equivalent students. The monthly enrollment data is released to Portland Public Schools at the same time it is provided to the Oregon Department of Education. Portland Public Schools reviews the data and calculates the value due. PPS notifies The Cottonwood School of Civics and Science of the calculated value via email and then, per agreement, transmits the funds electronically within 10 days of receipt of funding from the State of Oregon.

I. FUNDRAISING

Various fundraising activities supplement the resources available for school programs. The proceeds of fundraising activities, net of related fundraising costs, are reported as part of operating revenue and contributions in the Statement of Activities.

J. ESTIMATES

The preparation of the basic financial statements in conformity with accounting principles generally accepted in the United States of America requires management to make estimates and assumptions that affect the reported amounts of assets and liabilities and disclosure of contingent assets and liabilities at the date of the basic financial statements and the reported amounts of revenues and expenses during the reporting period. Actual results could differ from those estimates.

K. SUPPLY INVENTORY

Detailed supply inventory records are not maintained. Inventories are not considered by management to be material at year end.

THE COTTONWOOD SCHOOL OF CIVICS AND SCIENCE
PORTLAND, OREGON

NOTES TO THE BASIC FINANCIAL STATEMENTS

1. SUMMARY OF SIGNIFICANT ACCOUNTING POLICIES, (CONTINUED)

L. PREPAID EXPENSES

Prepaid expenses are reported for purchases of services paid for during the year but not used until next year. Prepaid expenses at June 30, 2021 include parking, down payment for events, and other miscellaneous expenses paid in advance.

M. DONATED MATERIALS AND SERVICES

Contributions of noncash assets are recorded at their fair values in the period received. Contributions of donated services that create or enhance nonfinancial assets or require specialized skills, are provided by individuals possessing those skills, and would typically need to be purchased if not provided by donation¹⁴⁴ are recorded at their fair values in the period received. There were no material donated noncash assets or material donated services for the year ending June 30, 2021.

N. FUND BALANCES

GASB Statement No. 54, *Fund Balance Reporting and Governmental Fund-type Definitions*, is followed. The objective of this statement is to enhance the usefulness of fund balance information by providing clearer fund balance classifications that can be more consistently applied and by clarifying the existing governmental fund-type definitions. This statement establishes fund balance classifications that comprise a hierarchy based primarily on the extent to which a government is bound to observe constraints imposed on the use of the resources reported in governmental funds. Under this standard, the fund balance classifications are non-spendable, restricted, committed, assigned, and unassigned.

- Non-spendable fund balance represents amounts that are not in a spendable form. The non-spendable fund balance represents prepaid expenses.
- Restricted fund balance represents amounts that are legally restricted by outside parties for a specific purpose (such as debt covenants, grant requirements, donor requirements, or other governments) or are restricted by law (constitutionally or by enabling legislation).
- Committed fund balance represents funds formally set aside by the governing body for a particular purpose. The use of committed funds would be approved by resolution.
- Assigned fund balance represents amounts that are constrained by the expressed intent to use resources for specific purposes that do not meet the criteria to be classified as restricted or committed. Intent can be stipulated by the governing body. The Board has authorized the Business Officer to assign funds.
- Unassigned fund balance is the residual classification of the General Fund. Only the General Fund may report a positive unassigned fund balance. Other governmental funds would report any negative residual fund balance as assigned.

The following order of spending is used regarding fund balance categories: Restricted resources are spent first when both restricted and unrestricted (committed, assigned or unassigned) resources are available for expenditures. When unrestricted resources are spent, the order of spending is committed (if applicable), assigned (if applicable) and unassigned.

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NOTES TO THE BASIC FINANCIAL STATEMENTS

1. SUMMARY OF SIGNIFICANT ACCOUNTING POLICIES, (CONTINUED)

N. FUND BALANCE (CONTINUED)

At June 30, 2021, total assigned balances were \$14,450 of which \$3,000 was assigned for Friends of SWCS, \$2,846 was assigned for scholarship fund, \$81 was assigned for student council, and \$8,523 was assigned for student plays.

There was no committed or restricted fund balance at year end.

O. DEPOSITS

A refundable security deposit is held by WPC Bancroft, LLC for property rental (see Note 9).

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P. FAIR VALUE INPUTS, METHODOLOGIES AND HIERARCHY

Fair value is defined as the price that would be received to sell an asset or paid to transfer a liability in an orderly transaction between market participants at the measurement date. Observable inputs are developed based on market data obtained from sources independent of the reporting entity. Unobservable inputs are developed based on the best information available about the assumptions market participants would use in pricing the asset. The classification of securities within the fair value hierarchy is based upon the activity level in the market for the security type and the inputs used to determine their fair value, as follows:

Level 1 – unadjusted price quotations in active markets/exchanges for identical assets or liabilities that each Fund has the ability to access

Level 2 – other observable inputs (including, but not limited to, quoted prices for similar assets or liabilities in markets that are active, quoted prices for identical or similar assets or liabilities in markets that are not active, inputs other than quoted prices that are observable for the assets or liabilities (such as interest rates, yield curves, volatilities, loss severities, credit risks and default rates) or other market-corroborated inputs

Level 3 – unobservable inputs based on the best information available in the circumstances, to the extent observable inputs are not available (including each Fund's own assumptions used in determining the fair value of investments)

The hierarchy gives the highest priority to unadjusted quoted prices in active markets for identical assets or liabilities (Level 1 measurements) and the lowest priority to unobservable inputs (Level 3 measurements). Accordingly, the degree of judgment exercised in determining fair value is greatest for instruments categorized in Level 3. The inputs used to measure fair value may fall into different levels of the fair value hierarchy. In such cases, for disclosure purposes, the fair value hierarchy classification is determined based on the lowest level input that is significant to the fair value measurement in its entirety.

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NOTES TO THE BASIC FINANCIAL STATEMENTS

2. CASH AND INVESTMENTS

DEPOSITS

Deposits with financial institutions include bank demand deposits. Oregon Revised Statutes require deposits to be adequately covered by federal depository insurance or deposited at an approved depository as identified by the Treasury. The total bank balances per the bank statements as of June 30, 2021 was \$1,569,765 of which \$250,000 was covered by federal depository insurance and the remainder was collateralized by the Oregon Public Funds Collateralization Program (PFCP).

Cash at June 30, 2021 consisted of:

Bank demand deposits	\$ 1,559,377
Petty cash	100
	<u>\$ 1,559,477</u>

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CUSTODIAL CREDIT RISK – DEPOSITS

In the case of deposits, there is the risk that in the event of a bank failure, the deposits may not be returned. There is no deposit policy for custodial credit risk. As of June 30, 2021, none of the bank balances were exposed to custodial credit risk.

INTEREST RATE RISK-INVESTMENTS

Oregon Revised Statutes require investments to not exceed a maturity of 18 months, except when the local government has adopted a written investment policy that was submitted to and reviewed by the OSTFB. There were no investments.

INVESTMENTS

Policy is to follow state statutes governing cash management. Statutes authorize investing in banker's acceptances, repurchase agreements, obligations of the United States and its agencies and instrumentalities.

CREDIT RISK – INVESTMENTS

Oregon Revised Statutes do not limit investments as to credit rating for securities purchased from US Government Agencies or USGSE.

CONCENTRATION OF CREDIT RISK - INVESTMENTS

There were no investments at June 30, 2021.

THE COTTONWOOD SCHOOL OF CIVICS AND SCIENCE
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NOTES TO THE BASIC FINANCIAL STATEMENTS

3. CAPITAL ASSETS

Changes in capital assets for the year ended June 30, 2021 are as follows:

	Balance July 1, 2020	Additions	Deletions	Balance June 30, 2021
Capital Assets				
Leasehold Improvements	\$ 61,535	\$ -	\$ -	\$ 61,535
Equipment	76,205	-	-	76,205
Total	137,740	-	-	137,740
Accumulated Depreciation				
Leasehold Improvements	27,023	3,230	-	30,253
Equipment	67,318	4,220	-	71,538
Total	94,341	7,450	-	101,791
Total Net Capital Assets	\$ 43,399			\$ 35,949

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Depreciation expense for the year is allocated as follows:

Instruction	\$ 3,241
Support	4,209
	\$ 7,450

4. TAX STATUS

The School is qualified pursuant to Section 501(c)(3) of the Internal Revenue Code, and, accordingly, the School's net investment income is exempt from income taxes. The School has obtained a favorable determination letter from the Internal Revenue Service and the Board of Directors believe that the School continues to qualify and to operate in accordance with applicable provisions of the Internal Revenue Code.

U.S. Generally Accepted Accounting Principles require The Cottonwood School's management to evaluate tax positions taken and recognize a tax liability (or asset) if the School has taken an uncertain position that more likely than not would not be sustained upon examination by the Internal Revenue Service. The School is subject to routine audits by taxing jurisdictions; however, there are currently no audits for any tax periods in progress. Management believes it is no longer subject to income tax examinations for years prior to 2017.

5. RISK MANAGEMENT

There is exposure to various risks of loss related to torts; theft of, damage to, and destruction of assets; errors and omissions; injuries to employees; and natural disasters. Commercial insurance is purchased to minimize exposure to these risks. Settled claims have not exceeded this commercial coverage for the last three fiscal years.

THE COTTONWOOD SCHOOL OF CIVICS AND SCIENCE
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NOTES TO THE BASIC FINANCIAL STATEMENTS

6. DEFINED BENEFIT PENSION PLAN

Plan Description – The Oregon Public Employees Retirement System (PERS) consists of a single cost-sharing multiple-employer defined benefit plan. All benefits of the system are established by the legislature pursuant to Oregon Revised Statute (ORS) Chapters 238 and 238A. Oregon PERS produces an independently audited Comprehensive Annual Financial Report which can be found at:

<https://www.oregon.gov/pers/Documents/Financials/CAFR/2020-CAFR.pdf>

If the link is expired please contact Oregon PERS for this information.

- a. **PERS Pension (Chapter 238).** The ORS Chapter 238 Defined Benefit Plan is closed to new members hired on or after August 29, 2003.
- i. **Pension Benefits.** The PERS retirement allowance is payable monthly for life. It may be selected from 13 retirement benefit options. These options include survivorship benefits and lump-sum refunds. The basic benefit is based on years of service and final average salary. A percentage (2.0 percent for police and fire employees, and 1.67 percent for general service employees) is multiplied by the number of years of service and the final average salary. Benefits may also be calculated under either a formula plus annuity (for members who were contributing before August 21, 1981) or a money match computation if a greater benefits results. A member is considered vested and will be eligible at minimum retirement age for a service retirement allowance if he or she has had a contribution in each of five calendar years or has reached at least 50 years of age before ceasing employment with a participating employer (age 45 for police and fire members). General service employees may retire after reaching age 55. Police and fire members are eligible after reaching age 50. Tier 1 general service employee benefits are reduced if retirement occurs prior to age 58 with fewer than 30 years of service. Police and fire member benefits are reduced if retirement occurs prior to age 55 with fewer than 25 years of service. Tier 2 members are eligible for full benefits at age 60. The ORS Chapter 238 Defined Benefit Pension Plan is closed to new members hired on or after August 29, 2003.
- ii. **Death Benefits.** Upon the death of a non-retired member, the beneficiary receives a lump-sum refund of the member's account balance (accumulated contributions and interest). In addition, the beneficiary will receive a lump-sum payment from employer funds equal to the account balance, provided one or more of the following contributions are met:
- member was employed by PERS employer at the time of death,
 - member died within 120 days after termination of PERS covered employment,
 - member died as a result of injury sustained while employed in a PERS-covered job, or
 - member was on an official leave of absence from a PERS-covered job at the time of death.
- iii. **Disability Benefits.** A member with 10 or more years of creditable service who becomes disabled from other than duty-connected causes may receive a non-duty disability benefit. A disability resulting from a job-incurred injury or illness qualifies a member (including PERS judge members) for disability benefits regardless of the length of PERS-covered service. Upon qualifying for either a non-duty or duty disability, service time is computed to age 58 (55 for police and fire members) when determining the monthly benefit.
- iv. **Benefit Changes After Retirement.** Members may choose to continue participation in their variable account after retiring and may experience annual benefit fluctuations due to changes in the fair value of the underlying global equity investments of that account. Under ORS 238.360 monthly benefits are adjusted annually through cost-of-living changes (COLA). The COLA is capped at 2.0 percent.

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NOTES TO THE BASIC FINANCIAL STATEMENTS

6. DEFINED BENEFIT PENSION PLAN (CONTINUED)

b. **OPSRP Pension Program (OPSRP DB).** The ORS Chapter 238A Defined Benefit Pension Program provides benefits to members hired on or after August 29, 2003.

i. **Pension Benefits.** This portion of OPSRP provides a life pension funded by employer contributions. Benefits are calculated with the following formula for members who attain normal retirement age:

Police and fire: 1.8 percent is multiplied by the number of years of service and the final average salary. Normal retirement age for police and fire members is age 60 or age 53 with 25 years of retirement credit. To be classified as a police and fire member, the individual must have been employed continuously as a police and fire member for at least five years immediately preceding retirement.

General service: 1.5 percent is multiplied by the number of years of service and the final average salary. Normal retirement age for general service members is age 65, or age 58 with 30 years of retirement credit.

A member of the pension program becomes vested on the earliest of the following dates: the date the member completes 600 hours of service in each of five calendar years, the date the member reaches normal retirement age, and, if the pension program is terminated, the date on which termination becomes effective.

ii. **Death Benefits.** Upon the death of a non-retired member, the spouse or other person who is constitutionally required to be treated in the same manner as the spouse, receives for life 50 percent of the pension that would otherwise have been paid to the deceased member. The surviving spouse may elect to delay payment of the death benefit, but payment must commence no later than December 31 of the calendar year in which the member would have reached 70½ years.

iii. **Disability Benefits.** A member who has accrued 10 or more years of retirement credits before the member becomes disabled or a member who becomes disabled due to job-related injury shall receive a disability benefit of 45 percent of the member's salary determined as of the last full month of employment before the disability occurred.

Contributions – PERS funding policy provides for monthly employer contributions at actuarially determined rates. These contributions, expressed as a percentage of covered payroll, are intended to accumulate sufficient assets to pay benefits when due. The funding policy applies to the PERS Defined Benefit Plan and the Other Postemployment Benefit Plans. Employer contribution rates during the period were based on the December 31, 2017 actuarial valuation, which became effective July 1, 2019. The state of Oregon and certain schools, community colleges, and political subdivision have made unfunded actuarial liability payments and their rates have been reduced. Effective January 1, 2020, Senate Bill 1049 requires employees to pay contributions on re-employed PERS retirees' salaries as if they were an active member, excluding IAP (6%) contributions. Employer contributions for the year ended June 30, 2021 were \$161,190, excluding amounts to fund employer specific liabilities.

THE COTTONWOOD SCHOOL OF CIVICS AND SCIENCE
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NOTES TO THE BASIC FINANCIAL STATEMENTS

6. DEFINED BENEFIT PENSION PLAN (CONTINUED)

Pension Asset or Liability – At June 30, 2021, the School reported a net pension liability of \$1,919,350 for its proportionate share of the net pension liability. The pension liability was measured as of June 30, 2020, and the total pension liability used to calculate the net pension liability was determined by an actuarial valuation dated December 31, 2018. The School’s proportion of the net pension liability was based on a projection of the School’s long-term share of contributions to the pension plan relative to the projected contributions of all participating employers, actuarially determined. As of the measurement date of June 30, 2020 and 2019, the School’s proportion was .009 percent and .001 percent, respectively. Pension expense for the year ended June 30, 2021 was \$341,719.

The rates in effect for the year ended June 30, 2021 were:

- (1) Tier 1/ Tier 2 – 32.03%
- (2) OPSRP general services – 26.58%

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	Deferred Outflow of Resources	Deferred Inflow of Resources
Difference between expected and actual experience	\$ 84,475	\$ -
Changes in assumptions	103,005	3,609
Net difference between projected and actual earnings on pension plan investments	225,691	-
Changes in proportionate share	939,183	591,796
Difference between School contributions and proportionate share of contributions	97,176	12,127
Subtotal - amortized deferrals below	1,449,530	607,532
School contributions subsequent to measurement date	161,190	-
Deferred outflow (inflow) of resources	\$ 1,610,720	\$ 607,532

The amount of contributions subsequent to the measurement date will be included as a reduction of the net pension liability in the fiscal year ended June 30, 2022.

Subtotal amounts related to pension as deferred outflows of resources, \$1,449,530, and deferred inflows of resources, (\$607,532), net to \$841,998 and will be recognized in pension expense as follows:

Year ending June 30,	Amount
2022	162,780
2023	183,734
2024	172,053
2025	258,874
2026	64,557
Total	\$ 841,998

All assumptions, methods and plan provisions used in these calculations are described in the Oregon PERS system-wide GASB 68 reporting summary dated March 12, 2021. Oregon PERS produces an independently audited CAFR which can be found at:

<https://www.oregon.gov/pers/Documents/Financials/CAFR/2020-CAFR.pdf>

THE COTTONWOOD SCHOOL OF CIVICS AND SCIENCE
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NOTES TO THE BASIC FINANCIAL STATEMENTS

6. DEFINED BENEFIT PENSION PLAN (CONTINUED)

Actuarial Valuations – The employer contribution rates effective July 1, 2019 through June 30, 2021, were set using the entry age normal actuarial cost method. For the Tier One/Tier Two component of the PERS Defined Benefit Plan, this method produced an employer contribution rate consisting of (1) an amount for normal cost (estimated amount necessary to finance benefits earned by employees during the current service year), (2) an amount for the amortization unfunded actuarial accrued liabilities, which are being amortized over a fixed period with new unfunded actuarial liabilities being amortized over 20 years.

For the OPSRP Pension Program component of the PERS Defined Benefit Plan, this method produced an employer rate consisting of (a) an amount for normal cost (the estimated amount necessary to finance benefits earned by the employees during the current service year), (b) an actuarially determined amount for funding a disability benefit component, and (c) an amount for the amortization of unfunded actuarial accrued liabilities, which are being amortized over a fixed period with new unfunded actuarial accrued liabilities being amortized over 16 years.

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Actuarial Methods and Assumptions:

Valuation date	December 31, 2018
Experience Study Report	2018, Published July 24, 2019
Actuarial cost method	Entry Age Normal
Amortization method	Level percentage of payroll
Asset valuation method	Market value of assets
Inflation rate	2.50 percent
Investment rate of return	7.20 percent
Discount rate	7.20 percent
Projected salary increase	3.50 percent
Cost of Living Adjustment	Blend of 2% COLA and graded COLA (1.25%/0.15%) in accordance with <i>Moro</i> decision, blend based on service
Mortality	Healthy retirees and beneficiaries: Pub-2010 Healthy Retiree, sex distinct, generational with Unisex, Social Security Data Scale, with job category adjustments and set-backs as described in the valuation. Active members: Pub-2010 Employee, sex distinct, generational with Unisex, Social Security Data Scale, with job category adjustments and set-backs as described in the valuation. Disabled retirees: Pub-2010 Disabled Retiree, sex distinct, generational with Unisex, Social Security Data Scale, with job category adjustments and set-backs as described in the valuation.

Actuarial valuations of an ongoing plan involve estimates of value of reported amounts and assumptions about the probability of events far into the future. Actuarially determined amounts are subject to continual revision as actual results are compared to past expectations and new estimates are made about the future. Experience studies are performed as of December 31 of even numbered years. The method and assumptions shown are based on the 2018 Experience Study which is reviewed for the four-year period ending December 31, 2018.

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NOTES TO THE BASIC FINANCIAL STATEMENTS

6. DEFINED BENEFIT PENSION PLAN (CONTINUED)

Assumed Asset Allocation:

Asset Class/Strategy	Low Range	High Range	OIC Target
Debt Securities	15.0%	25.0%	20.0%
Public Equity	27.5%	37.5%	32.5%
Real Estate	9.5%	15.5%	12.5%
Private Equity	14.0%	21.0%	17.5%
Alternative Investments	7.5%	17.5%	15.0%
Opportunity Portfolio	0.0%	3.0%	0.0%
Risk Parity	0.0%	2.5%	2.5%
Total			100.0%

(Source: June 30, 2020 PERS CAFR; p. 102)

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Long-Term Expected Rate of Return:

To develop an analytical basis for the selection of the long-term expected rate of return assumption, in May 2019 the PERS Board reviewed long-term assumptions developed by both Milliman's capital market assumptions team and the Oregon Investment Council's (OIC) investment advisors. The table below shows Milliman's assumptions for each of the asset classes in which the plan was invested at that time based on the OIC long-term target asset allocation. The OIC's description of each asset class was used to map the target allocation to the asset classes shown below. Each asset class assumption is based on a consistent set of underlying assumptions, and includes adjustment for the inflation assumption. These assumptions are not based on historical returns, but instead are based on a forward-looking capital market economic model.

Asset Class	Target Allocation	Compound Annual (Geometric) Return
Core Fixed Income	9.60%	4.07%
Short-Term Bonds	9.60%	3.68%
Bank/Leveraged Loans	3.60%	5.19%
High Yield Bonds	1.20%	5.74%
Large/Mid Cap US Equities	16.17%	6.30%
Small Cap US Equities	1.35%	6.68%
Micro Cap US Equities	1.35%	6.79%
Developed Foreign Equities	13.48%	6.91%
Emerging Market Equities	4.24%	7.69%
Non-US Small Cap Equities	1.93%	7.25%
Private Equity	17.50%	8.33%
Real Estate (Property)	10.00%	5.55%
Real Estate (REITS)	2.50%	6.69%
Hedge Fund of Funds - Diversified	1.50%	4.06%
Hedge Fund - Event-driven	0.38%	5.59%
Timber	1.13%	5.61%
Farmland	1.13%	6.12%
Infrastructure	2.25%	6.67%
Commodities	1.13%	3.79%
Assumed Inflation - Mean		2.50%

(Source: June 30, 2020 PERS CAFR; p. 74)

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NOTES TO THE BASIC FINANCIAL STATEMENTS

6. DEFINED BENEFIT PENSION PLAN (CONTINUED)

Discount Rate – The discount rate used to measure the total pension liability as of the measurement dates of June 30, 2020 and 2019 was 7.20 percent for both years for the Defined Benefit Pension Plan. The projection of cash flows used to determine the discount rate assumed that contributions from the plan members and those of the contributing employers are made at the contractually required rates, as actuarially determined. Based on those assumptions, the pension plan’s fiduciary net position was projected to be available to make all projected future benefit payments of current plan members. Therefore, the long-term expected rate of return on pension plan investments for the Defined Benefit Pension Plan was applied to all periods of projected benefit payments to determine the total pension liability.

Sensitivity of the School’s proportionate share of the net pension liability to changes in the discount rate – The following presents the School’s proportionate share of the net pension liability calculated using the discount rate of 7.20 percent, as well as what the School’s proportionate share of the net pension liability would be if it were calculated using a discount rate that is one percent lower (6.20 percent) or one percent higher (8.20 percent) than the current rate.

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	1% Decrease (6.20%)	Discount Rate (7.20%)	1% Increase (8.20%)
School's proportionate share of the net pension liability	\$ 2,850,076	\$ 1,919,350	\$ 1,138,893

Changes Subsequent to the Measurement Date

As described above, GASB 67 and GASB 68 require the Total Pension Liability to be determined based on the benefit terms in effect at the Measurement Date. Any changes to benefit terms that occurs after that date are reflected in amounts reported for the subsequent Measurement Date. However, Paragraph 80f of GASB 68 requires employers to briefly describe any changes between the Measurement Date and the employer’s reporting date that are expected to have a significant effect on the employer’s share of the collective Net Pension Liability, along with an estimate of the resulting change, if available. There are no changes subsequent to the June 30, 2020 Measurement Date that meet this requirement.

OPSRP Individual Account Program (OPSRP IAP)

Plan Description:

Employees of the School are provided with pensions through OPERS. All the benefits of OPERS are established by the Oregon legislature pursuant to Oregon Revised Statute (ORS) Chapters 238 and 238A. Chapter 238 Defined Benefit Pension Plan is closed to new members hired on or after August 29, 2003. Chapter 238A created the Oregon Public Service Retirement Plan (OPSRP), which consists of the Defined Benefit Pension Program and the Individual Account Program (IAP). Membership includes public employees hired on or after August 29, 2003. PERS members retain their existing defined benefit plan accounts, but member contributions are deposited into the member’s IAP account. OPSRP is part of OPERS, and is administered by the OPERS Board.

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NOTES TO THE BASIC FINANCIAL STATEMENTS

6. DEFINED BENEFIT PENSION PLAN (CONTINUED)

Pension Benefits:

Participants in OPERS defined benefit pension plans also participate in their defined contribution plan. An IAP member becomes vested on the date the employee account is established or on the date the rollover account was established. If the employer makes optional employer contributions for a member, the member becomes vested on the earliest of the following dates: the date the member completes 600 hours of service in each of five calendar years, the date the member reaches normal retirement age, the date the IAP is terminated, the date the active member becomes disabled, or the date the active member dies. Upon retirement, a member of the OPSRP IAP may receive the amounts in his or her employee account, rollover account, and vested employer account as a lump-sum payment or in equal installments over a 5-, 10-, 15-, 20-year period or an anticipated life span option. Each distribution option has a \$200 minimum distribution limit.

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Death Benefits:

Upon the death of a non-retired member, the beneficiary receives in a lump sum the member's account balance, rollover account balance, and vested employer optional contribution account balance. If a retired member dies before the installment payments are completed, the beneficiary may receive the remaining installment payments or choose a lump-sum payment.

Contributions:

Employees of the School pay six (6) percent of their covered payroll. Effective July 1, 2020, currently employed Tier 1/Tier 2 and OPSERP members earning \$2,500 or more per month will have a portion of their 6 percent monthly IAP contributions redirected to an Employee Pension Stability Account. The Employee Pension Stability Account will be used to pay part of the member's future benefit. Of the 6 percent monthly IAP contribution, Tier 1/Tier 2 will have 2.5 percent redirected to the Employee Pension Stability Account and OPSERP will have 0.75 percent redirected to the Employee Pension Stability Account, with the remaining going to the member's existing IAP account. Members may voluntarily choose to make additional after-tax contributions into their IAP account to make a full 6 percent contribution to the IAP. The School did not make any optional contributions to member IAP accounts for the year ended June 30, 2021.

Additional disclosures related to Oregon PERS not applicable to specific employers are available online, or by contacting PERS at the following address: PO Box 23700 Tigard, OR 97281-3700.

<http://www.oregon.gov/pers/EMP/Pages/GASB.aspx>

7. OTHER POST-EMPLOYMENT BENEFIT PLAN – (RHIA)

Plan Description:

As a member of Oregon Public Employees Retirement System (OPERS) the School contributes to the Retirement Health Insurance Account (RHIA) for each of its eligible employees. RHIA is a cost-sharing multiple-employer defined benefit other postemployment benefit plan administered by OPERS. RHIA pays a monthly contribution toward the cost of Medicare companion health insurance premiums of eligible retirees. Oregon Revised Statute (ORS) 238.420 established this trust fund. Authority to establish and amend the benefit provisions of RHIA reside with the Oregon Legislature. The plan is closed to new entrants after January 1, 2004. OPERS issues a publicly available financial report that includes financial statements and required supplementary information. That report may be obtained by writing to Oregon Public Employees Retirement System, PO Box 23700, Tigard, OR 97281-3700.

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NOTES TO THE BASIC FINANCIAL STATEMENTS

7. OTHER POST-EMPLOYMENT BENEFIT PLAN – (RHIA) – (CONTINUED)

Funding Policy:

Because RHIA was created by enabling legislation (ORS 238.420), contribution requirements of the plan members and the participating employers were established and may be amended only by the Oregon Legislature. ORS require that an amount equal to \$60 dollars or the total monthly cost of Medicare companion health insurance premiums coverage, whichever is less, shall be paid from the Retirement Health Insurance Account established by the employer, and any monthly cost in excess of \$60 dollars shall be paid by the eligible retired member in the manner provided in ORS 238.410. To be eligible to receive this monthly payment toward the premium cost the member must: (1) have eight years or more of qualifying service in OPERS at the time of retirement or receive a disability allowance as if the member had eight years or more of creditable service in OPERS, (2) receive both Medicare Parts A and B coverage, and (3) enroll in an OPERS-sponsored health plan. A surviving spouse or dependent of a deceased OPERS retiree who was eligible to receive the subsidy is eligible to receive the subsidy if he or she (1) is receiving a retirement benefit or allowance from OPERS or (2) was insured at the time the member died and the member retired before May 1, 1991.

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Participating employers are contractually required to contribute to RHIA at a rate assessed each year by OPERS, and the School currently contributes 0.06% of annual covered OPERF payroll and 0.00% of OPSRP payroll under a contractual requirement in effect until June 30, 2021. Consistent with GASB Statement 75, the OPERS Board of Trustees sets the employer contribution rates as a measure of the proportionate relationship of the employer to all employers consistent with the manner in which contributions to the OPEB plan are determined. The basis for the employer's portion is determined by comparing the employer's actual, legally required contributions made during the fiscal year to the plan with the total actual contributions made in the fiscal year of all employers. The School's contributions to RHIA are included in PERS contributions for all reporting years and equaled the required contributions each year.

At June 30, 2021, the School reported a net OPEB liability/(asset) of (\$7,402) for its proportionate share of the net OPEB liability/(asset). The OPEB liability/(asset) was measured as of June 30, 2020, and the total OPEB liability/(asset) used to calculate the net OPEB liability/(asset) was determined by an actuarial valuation as of December 31, 2018. Consistent with GASB Statement No. 75, paragraph 59(a), the School's proportion of the net OPEB liability/(asset) is determined by comparing the employer's actual, legally required contributions made during the fiscal year to the Plan with the total actual contributions made in the fiscal year of all employers. As of the measurement dates of June 30, 2020 and 2019, the School's proportion was .004 percent and .006 percent, respectively. OPEB expense/(income) for the year ended June 30, 2021 was \$123.

Components of OPEB Expense/(Income):

Components of OPEB Expense/(Income):

Employer's proportionate share of collective system OPEB Expense/(Income)	\$	(1,191)
Net amortization of employer-specific deferred amounts from:		
- Changes in proportionate share (per paragraph 64 of GASB 75)		1,298
- Differences between employer contributions and employer's proportionate share of system contributions (per paragraph 65 of GASB 75)		-
Employer's Total OPEB Expense/(Income)	\$	107

THE COTTONWOOD SCHOOL OF CIVICS AND SCIENCE
PORTLAND, OREGON

NOTES TO THE BASIC FINANCIAL STATEMENTS

7. OTHER POST-EMPLOYMENT BENEFIT PLAN – (RHIA) – (CONTINUED)

Components of Deferred Outflows/Inflows of Resources:

	Deferred Outflow of Resources	Deferred Inflow of Resources
Difference between expected and actual experience	\$ -	\$ 757
Changes in assumptions	-	393
Net difference between projected and actual earnings on pension plan investments	823	-
Net changes in proportionate share	2,581	36
Difference between School contributions and proportionate share of contributions	-	156
Subtotal - Amortized deferrals (below)	3,404	1,186
School contributions subsequent to measurement date	-	-
Net deferred outflow (inflow) of resources	\$ 3,404	\$ 1,186

The amount of contributions subsequent to the measurement date will be included as a reduction of the net OPEB liability/(asset) in the fiscal year ended June 30, 2022.

Subtotal amounts related to OPEB as deferred outflows of resources, \$3,404, and deferred inflows of resources, (\$1,186), net to \$2,218 and will be recognized in OPEB expense as follows:

Year ending June 30,	Amount
2022	\$ 586
2023	1,068
2024	304
2025	260
Total	\$ 2,218

All assumptions, methods and plan provisions used in these calculations are described in the Oregon PERS Retirement Health Insurance Account Cost-Sharing Multiple-Employer Other Postemployment Benefit (OPEB) Plan Schedules of Employer Allocations and OPEB Amounts by Employer report, as of and for the Year Ended June 30, 2021. That independently audited report was dated March 12, 2021 and can be found at:

https://www.oregon.gov/pers/EMP/Documents/GASB/2020/GASB_75_FYE_6.30.2020.pdf

THE COTTONWOOD SCHOOL OF CIVICS AND SCIENCE
PORTLAND, OREGON

NOTES TO THE BASIC FINANCIAL STATEMENTS

7. OTHER POST-EMPLOYMENT BENEFIT PLAN – (RHIA) – (CONTINUED)

Actuarial Methods and Assumptions:

Valuation Date	December 31, 2018
Experience Study Report	2018, Published July 24, 2019
Actuarial cost method	Entry Age Normal
Inflation rate	2.50 percent
Investment rate of return	7.20 percent
Discount rate	7.20 percent
Projected salary increase	3.50 percent
Retiree healthcare participation	Healthy retirees: 32%; Disabled retirees: 20%
Mortality	Healthy retirees and beneficiaries: Pub-2010 Healthy Retiree, sex distinct, generational with Unisex, Social Security Data Scale, with job category adjustments and set-backs as described in the valuation. Active members: Pub-2010 Employee, sex distinct, generational with Unisex, Social Security Data Scale, with job category adjustments and set-backs as described in the valuation. Disabled retirees: Pub-2010 Disabled Retiree, sex distinct, generational with Unisex, Social Security Data Scale, with job category adjustments and set-backs as described in the valuation.

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Actuarial valuations of an ongoing plan involve estimates of value of reported amounts and assumptions about the probability of events far into the future. Actuarially determined amounts are subject to continual revision as actual results are compared to past expectations and new estimates are made about the future. Experience studies are performed as of December 31 of even numbered years. The method and assumptions shown are based on the 2018 Experience Study which is reviewed for the four-year period ending December 31, 2018.

Discount Rate:

The discount rate used to measure the total OPEB liability as of the measurement dates of June 30, 2020 and 2019 was 7.20 and 7.20 percent, respectively. The projection of cash flows used to determine the discount rate assumed that contributions from contributing employers are made at the contractually required rates, as actuarially determined. Based on those assumptions, the RHIA plan's fiduciary net position was projected to be available to make all projected future benefit payments of current plan members. Therefore, the long-term expected rate of return on OPEB plan investments for the RHIA plan was applied to all periods of projected benefit payments to determine the total OPEB liability.

THE COTTONWOOD SCHOOL OF CIVICS AND SCIENCE
PORTLAND, OREGON

NOTES TO THE BASIC FINANCIAL STATEMENTS

7. OTHER POST-EMPLOYMENT BENEFIT PLAN – (RHIA) – (CONTINUED)

Long-Term Expected Rate of Return:

To develop an analytical basis for the selection of the long-term expected rate of return assumption, in May 2019 the PERS Board reviewed long-term assumptions developed by both Milliman’s capital market assumptions team and the Oregon Investment Council’s (OIC) investment advisors. The table below shows Milliman’s assumptions for each of the asset classes in which the plan was invested at that time based on the OIC long-term target asset allocation. The OIC’s description of each asset class was used to map the target allocation to the asset classes shown below. Each asset class assumption is based on a consistent set of underlying assumptions, and includes adjustment for the inflation assumption. These assumptions are not based on historical returns, but instead are based on a forward-looking capital market economic model.

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Asset Class	Target Allocation	Compound Annual (Geometric) Return
Core Fixed Income	9.60%	4.07%
Short-Term Bonds	9.60%	3.68%
Bank/Leveraged Loans	3.60%	5.19%
High Yield Bonds	1.20%	5.74%
Large/Mid Cap US Equities	16.17%	6.30%
Small Cap US Equities	1.35%	6.68%
Micro Cap US Equities	1.35%	6.79%
Developed Foreign Equities	13.48%	6.91%
Emerging Market Equities	4.24%	7.69%
Non-US Small Cap Equities	1.93%	7.25%
Private Equity	17.50%	8.33%
Real Estate (Property)	10.00%	5.55%
Real Estate (REITS)	2.50%	6.69%
Hedge Fund of Funds - Diversified	1.50%	4.06%
Hedge Fund - Event-driven	38.00%	5.59%
Timber	1.13%	5.61%
Farmland	1.13%	6.12%
Infrastructure	2.25%	6.67%
Commodities	1.13%	3.79%
<i>Assumed Inflation - Mean</i>		2.50%

(Source: June 30, 2020 PERS CAFR; p. 74)

Sensitivity of the School’s proportionate share of the net OPEB liability/(asset) to changes in the discount rate – The following presents the School’s proportionate share of the net OPEB liability/(asset) calculated using the discount rate of 7.20 percent, as well as what the School’s proportionate share of the net pension liability would be if it were calculated using a discount rate that is one percent lower (6.20 percent) or one percent higher (8.20 percent) than the current rate.

	1% Decrease (6.20%)	Discount Rate (7.20%)	1% Increase (8.20%)
District's proportionate share of the net pension liability	\$ (5,976)	\$ (7,402)	\$ (8,622)

THE COTTONWOOD SCHOOL OF CIVICS AND SCIENCE
PORTLAND, OREGON

NOTES TO THE BASIC FINANCIAL STATEMENTS

7. OTHER POST-EMPLOYMENT BENEFIT PLAN – (RHIA) – (CONTINUED)

Changes Subsequent to the Measurement Date

There are no changes subsequent to the June 30, 2020 Measurement Date that meet this requirement and thus would require a brief description under the GASB standard.

8. CAPITAL LEASE

There were no new capital lease obligations entered into by the School during 2020-21.

9. OPERATING LEASES EXPENSE

There is a lease with WPC Bancroft LLC for premises located at 0680 SW Bancroft Ave. Portland, Oregon 97239. The lease term is effective from January 1, 2011 to June 30, 2030. Lease payments include \$17,500 of base rent and an additional \$3,406 of operating costs per month. For the year ended June 30, 2021, the School recorded \$238,145 for this building lease, which included \$40,872 in maintenance fees. The operating costs are reviewed each December with the new amount provided in January with documents supporting the increase. For fiscal years 2022 through 2023 the lease payments include \$18,025 of base rent and an additional \$3,406 of operating costs per month. For fiscal years 2024 through 2030, the School and landlord shall agree upon a new base rent.

Future minimum lease payments are as follows:

Fiscal Year Ended:	Bancroft Lease
June 30, 2022	\$ 257,172
June 30, 2023	257,172
June 30, 2024	257,172
June 30, 2025	257,172
June 30, 2026	257,172
June 30, 2027-2031	1,285,860
Total Future Obligation	\$ 2,571,720

10. REVENUE

There was a month-to-month, sublease agreement with Waterfront Foursquare Church (sublessee) for the use of 0640 SW Bancroft Street, Portland, Oregon. The lease amount was \$2,000 per month and required a 90 day notification requirement to cancel the agreement; however, the lease was inactivated during 2019-20 due to the pandemic, and the future status of the sublease is uncertain as of the issuance date of these basic financial statements. For the year ended June 30, 2021 The Cottonwood School of Civics and Science received no rent income from Waterfront Foursquare Church.

THE COTTONWOOD SCHOOL OF CIVICS AND SCIENCE
PORTLAND, OREGON

NOTES TO THE BASIC FINANCIAL STATEMENTS

11. DEFERRED LEASE EXPENDITURES

In conjunction with the lease entered into with WPC Bancroft LLC as described in Note 9 above, the lessor has agreed to allow the school to defer a portion of its rental payments until later years. These deferments are amortized using a straight-line basis over the life of the loan. Deferred lease expense for the year ended June 30, 2021 was \$10,928. As of the year ended June 30, 2021 there was no remaining deferred lease liability balance.

12. COMMITMENTS AND CONTINGENCIES

A substantial portion of operating funding is State Basic School Support received from Portland Public Schools. State funding is determined through state wide revenue projections that are paid to individual school districts based on pupil counts and other factors in the state school fund revenue formula. Since these projections and pupil counts fluctuate they can cause increases or decreases in revenue. Due to these future uncertainties at the state level, the future effect on operations cannot be determined.

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The School operates under authority of the Oregon Department of Education who grants a charter to the School and exercises some oversight as required by Oregon law. The effect of non-renewal of the charter has not been determined.

Amounts received or receivable from grantor agencies are subject to audit and adjustment by grantor agencies, principally the federal and state governments. Any disallowed claims, including amounts already collected, may constitute a liability of the applicable funds. The amount, if any, of expenditures which may be disallowed by the grantor agencies cannot be determined at this time, although the management expects such amounts, if any, to be immaterial.

The COVID-19 outbreak worldwide has resulted in government mandated closures that have caused disruption in the School's ability to deliver-in-person education. The outbreak has affected local and global economies. The ultimate impact on the School's finances is not determinable at this time.

13. LOANS

On March 24, 2021, the School received \$228,709 in a direct borrowing under the Paycheck Protection Program with 1% interest from Heritage NW Bank. The School may apply for forgiveness of the loan to the extent it is used for payroll, utilities, and rent obligations. The School expects to receive full forgiveness (see note 14), and does not plan to make any payments on this loan. In the event that full forgiveness is not granted, any remaining balance matures on the five year anniversary of the receipt of the loan which is March 26, 2026. In the event any balance due is not paid by the maturity date, the interest would increase an additional 4%.

14. SUBSEQUENT EVENTS

On September 1, 2021, the School received notification that their direct borrowing under the Paycheck Protection Program had been forgiven in full.

REQUIRED
SUPPLEMENTARY INFORMATION

THE COTTONWOOD SCHOOL OF CIVICS AND SCIENCE
MULTNOMAH COUNTY, OREGON

REQUIRED SUPPLEMENTARY INFORMATION

June 30, 2021

PERS

SCHEDULE OF THE PROPORTIONATE SHARE OF THE NET PENSION LIABILITY

Year Ended June 30,	(a) Employer's proportion of the net pension liability (NPL)	(b) Employer's proportionate share of the net pension liability (NPL)	(c) The School's covered payroll	(b/c) NPL as a percentage of covered payroll	Plan fiduciary net position as a percentage of the total pension liability
2021	0.009 %	\$ 1,919,350	\$ 743,406	258.2 %	75.8 %
2020	0.001	179,132	714,318	25.1	80.2 %
2019	0.009	1,333,510	678,843	196.4	82.1
2018	0.009	1,247,660	617,839	201.9	83.1
2017	0.009	1,190,374	684,805	173.8	80.5
2016	0.009	591,930	472,271	125.3	91.9
2015	0.009	(173,111)	538,802	(32.1)	103.6
2014	0.009	389,731	483,876	80.5	92.0

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The amounts presented for each fiscal year were actuarially determined at 12/31 and rolled forward to the measurement date of 6/30 for each year presented.

These schedules are presented to illustrate the requirements to show information for 10 years. However, until a full 10-year trend has been compiled, information is presented only for the years for which the required supplementary information is available.

SCHEDULE OF CONTRIBUTIONS

Year	Statutorily required contribution	Contributions in relation to the statutorily required contribution	Contribution deficiency (excess)	Employer's covered payroll	Contributions as a percent of covered payroll
2021	\$ 161,190	\$ 161,190	\$ -	\$ 692,686	23.3 %
2020	197,361	197,361	-	743,406	26.5
2019	155,997	155,997	-	714,318	21.8
2018	152,747	152,747	-	678,843	22.5
2017	112,918	112,918	-	617,839	18.3
2016	101,878	101,878	-	684,805	14.9
2015	99,983	99,983	-	472,271	21.2
2014	103,202	103,202	-	538,802	19.2

The amounts presented for each fiscal year were actuarially determined at 12/31 and rolled forward to the measurement date of 6/30 for each year presented.

These schedules are presented to illustrate the requirements to show information for 10 years. However, until a full 10-year trend has been compiled, information is presented only for the years for which the required supplementary information is available.

THE COTTONWOOD SCHOOL OF CIVICS & SCIENCE
MULTNOMAH COUNTY, OREGON

REQUIRED SUPPLEMENTARY INFORMATION
 June 30, 2021

OPEB - RHIA

SCHEDULE OF THE PROPORTIONATE SHARE OF THE NET OPEB - RHIA ASSET/(LIABILITY)

Year Ended June 30,	(a) Employer's proportion of the net OPEB asset/ (liability) (NOA/(L))	(b) Employer's proportionate share of the net OPEB asset/ (liability) (NOA/(L))	(c) Employer's covered payroll	(b/c) NOA/(L) as a percentage of covered payroll	Plan fiduciary net position as a percentage of the total OPEB liability
2021	0.004 %	\$ 7,402	\$ 743,406	1.0 %	150.1 %
2020	0.006	11,911	714,318	1.7	144.4
2019	0.006	6,777	678,843	1.0	124.0
2018	0.006	2,314	617,839	0.4	108.9
2017	0.006	(1,503)	684,805	(0.2)	94.2

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The amounts presented for each fiscal year were actuarially determined at 12/31 and rolled forward to the measurement date of 6/30 for each year presented.

These schedules are presented to illustrate the requirements to show information for 10 years. However, until a full 10-year trend has been compiled, information is presented only for the years for which the required supplementary information is available.

Amounts for covered payroll © use the prior year's data to match the measurement date used by OPEB plan for each year

SCHEDULE OF CONTRIBUTIONS

Year	Statutorily required contribution	Contributions in relation to the statutorily required contribution	Contribution deficiency (excess)	Employer's covered payroll	Contributions as a percent of covered payroll
2021	\$ n/a	\$ n/a	\$ n/a	\$ 692,686	n/a %
2020	n/a	n/a	n/a	743,406	n/a
2019	n/a	n/a	n/a	714,318	n/a
2018	n/a	n/a	n/a	678,843	n/a
2017	n/a	n/a	n/a	617,839	n/a

The amounts presented for each fiscal year were actuarially determined at 12/31 and rolled forward to the measurement date of 6/30 for each year presented.

These schedules are presented to illustrate the requirements to show information for 10 years. However, until a full 10-year trend has been compiled, information is presented only for the years for which the required supplementary information is available.

All statutorily required contributions were made and are included within PERS contributions (see p. 28).

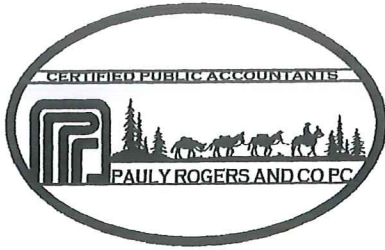
OTHER INFORMATION

THE COTTONWOOD SCHOOL OF CIVICS AND SCIENCE
PORTLAND, OREGON

SCHEDULE OF REVENUES, EXPENDITURES AND CHANGES IN FUND BALANCE
GENERAL FUND
- ACTUAL AND BUDGET -
for the Year Ended June 30, 2021

	ORIGINAL BUDGET	FINAL BUDGET	ACTUAL	VARIANCE FAVORABLE (UNFAVORABLE)
REVENUES:				
From Local Sources:				
Program fees	\$ 28,560	\$ 28,560	\$ 31,241	\$ 2,681
Fundraising	43,312	43,312	50,088	6,776
Contributions	5,000	5,000	36,295	31,295
In-kind contributions	-	-	750	750
Arts tax	16,638	16,638	15,204	(1,434)
Misc. income	-	-	673	673
Other local	-	-	51,337	51,337
Intermediate Sources	-	-	-	-
State Sources	1,501,541	1,501,541	1,717,972	216,431
Federal Sources	30,000	30,000	141,901	111,901
Total Revenues	<u>1,625,051</u>	<u>1,625,051</u>	<u>2,045,462</u>	<u>420,411</u>
EXPENDITURES:				
Instruction:				
Salaries	492,303	492,303	537,502	(45,199)
Payroll costs and employee benefits	268,046	268,046	247,640	20,406
Purchased services	273,091	273,091	43,328	229,763
Supplies and materials	80,998	80,998	113,706	(32,708)
Total Instruction	<u>1,114,439</u>	<u>1,114,439</u>	<u>942,176</u>	<u>172,263</u>
Support Services:				
Salaries	222,493	222,493	242,920	(20,427)
Payroll costs and employee benefits	121,142	121,142	112,038	9,104
Purchased services	123,422	123,422	330,342	(206,920)
Supplies and materials	36,606	36,606	14,470	22,136
Other objects	-	-	25,624	(25,624)
Total Support Services	<u>503,662</u>	<u>503,662</u>	<u>725,394</u>	<u>(221,732)</u>
Total Expenditures	<u>1,618,101</u>	<u>1,618,101</u>	<u>1,667,570</u>	<u>(49,469)</u>
Excess of Revenue over, (under) Expenditures	<u>6,950</u>	<u>6,950</u>	<u>377,892</u>	<u>370,942</u>
OTHER FINANCING SOURCES, (USES):				
Loan Proceeds	-	-	228,709	228,709
Total Other Financing Sources, (Uses)	<u>-</u>	<u>-</u>	<u>228,709</u>	<u>228,709</u>
Net Change in Fund Balance	6,950	6,950	606,601	599,651
Beginning Fund Balance	-	-	881,847	881,847
Ending Fund Balance	<u>\$ 6,950</u>	<u>\$ 6,950</u>	<u>\$ 1,488,448</u>	<u>\$ 1,481,498</u>

REPORTS ON LEGAL AND
OTHER REGULATORY REQUIREMENTS



PAULY, ROGERS, AND CO., P.C.
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www.paulyrogersandcpcpas.com

June 29, 2022

Independent Auditors' Report Required by Oregon State Regulations

We have audited the basic financial statements of The Cottonwood School of Civics and Science as of and for the year ended June 30, 2021, and have issued our report thereon dated June 29, 2022. We conducted our audit in accordance with auditing standards generally accepted in the United States of America.

Compliance

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As part of obtaining reasonable assurance about whether the basic financial statements are free of material misstatement, we performed tests of compliance with certain provisions of laws, regulations, contracts, and grants, including the provisions of Oregon Revised Statutes as specified in Oregon Administrative Rules 162-10-000 through 162-10-320 of the Minimum Standards for Audits of Oregon Municipal Corporations, noncompliance with which could have a direct and material effect on the determination of the basic financial statements amounts. However, providing an opinion on compliance with those provisions was not an objective of our audit, and accordingly, we do not express such an opinion.

We performed procedures to the extent we considered necessary to address the required comments and disclosures which included, but were not limited to the following

- **Deposits of public funds with financial institutions (ORS Chapter 295)**
- **Insurance and fidelity bonds in force or required by law.**
- **Public contracts and purchasing (ORS Chapters 279A, 279B, 279C).**
- **Programs funded from outside sources.**

In connection with our testing, nothing came to our attention that caused us to believe The Cottonwood School of Civics and Science was not in substantial compliance with certain provisions of laws, regulations, contracts, and grants, including the provisions of Oregon Revised Statutes as specified in Oregon Administrative Rules 162-10-000 through 162-10-320 of the Minimum Standards for Audits of Oregon Municipal Corporations.

OAR 162-10-0230 Internal Control

In planning and performing our audit, we considered internal control over financial reporting as a basis for designing our auditing procedures for the purpose of expressing our opinions on the basic financial statements, but not for the purpose of expressing an opinion on the effectiveness of internal control over financial reporting. Accordingly, we do not express an opinion on the effectiveness of the internal control over financial reporting.

We noted a matter involving the internal control structure and its operation that we consider to be a significant deficiency under standards established by the American Institute of Certified Public Accountants, which is noted in our management letter dated June 29, 2022.

This report is intended solely for the information and use of the Board of Directors, management, and the Oregon Secretary of State and is not intended to be and should not be used by anyone other than these parties.

A handwritten signature in cursive script that reads "Roy R Rogers".

ROY R. ROGERS, CPA
PAULY ROGERS AND CO, P.C168

CSCS EQUITY LENS



THE COTTONWOOD SCHOOL EQUITY LENS, USED BY STAFF, BOARD, AND COMMITTEES, IS INTENDED TO IMPROVE PLANNING, DECISION-MAKING, AND RESOURCE ALLOCATION TO PROMOTE INCLUSION AND ACCESS.

WHO

Who are the groups impacted?
Observe current demographics and disaggregated data trends. Identify target groups.



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TARGET GROUPS



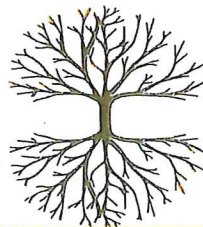
Could this decision to ignore or worsen disparities for specific target groups?

FOCUS GROUPS

How have you involved target groups in your decision making process? (Listening sessions, surveys, interviews)

BARRIERS

What barriers were identified by target groups? What other barriers are identified?



How will these barriers be mitigated?

COMMUNICATION

How will you communicate the decision to students, families, staff, and partners?



EVALUATION

Create a plan for reviewing this decision. How will members of the CSCS community be involved in assessing effectiveness?



The Cottonwood School
5-Year Projected Budget
FY 24 through FY28

	Year 1 - 23-24	Year 2 - 24-25	Year 3 - 25-26	Year 4 - 26-27	Year 5 - 27-28
ASSUMPTIONS					
Number Students	205	205	205	205	205
Funding Rate per Student	\$ 9,844	\$ 10,139	\$ 10,443	\$ 10,756	\$ 11,079
Charter Adjustment	90%	90%	90%	90%	90%
Funded Student Rate	\$ 8,859	\$ 9,125	\$ 9,399	\$ 9,681	\$ 9,971
Poverty Addition	8%	8%	8%	8%	8%
Poverty Funding Rate	25%	25%	25%	25%	25%
Fieldwork/Supply Contribution	\$ 300	\$ 300	\$ 300	\$ 300	\$ 300
Collection Rate	75%	75%	75%	75%	75%
Run for Arts per student	\$ 115	\$ 115	\$ 115	\$ 115	\$ 115
Fundraising/Event Income	\$ 42,000	\$ 44,500	\$ 47,000	\$ 49,500	\$ 52,000
Annual Staff Salary Increase	3%	3%	3%	3%	3%
Payroll tax percentage	9%	9%	9%	9%	9%
PERS contribution	20%	20%	21%	21%	22%
Health insurance increase	8%	8%	8%	8%	8%
Monthly substitute teacher cost	\$ 400	\$ 412	\$ 424	\$ 437	\$ 450
Monthly R&M and janitorial	\$ 4,200	\$ 4,326	\$ 4,456	\$ 4,589	\$ 4,727
Monthly phone/internet	\$ 650	\$ 670	\$ 690	\$ 710	\$ 732
Monthly printing/binding	\$ 500	\$ 515	\$ 530	\$ 546	\$ 563
Rent/CAM - month	\$ 21,300	\$ 22,000	\$ 22,500	\$ 23,200	\$ 23,700
General expense increase	3%	3%	3%	3%	3%
Net Income (from below)	\$ 50,523	\$ 43,687	\$ 35,732	\$ 15,369	\$ 9,925
INCOME					
1 SSF - General Support	\$ 1,852,488	\$ 1,908,062	\$ 1,965,304	\$ 2,024,263	\$ 2,084,991
2 Student Investment Account Funding	\$ 130,000	\$ 132,000	\$ 134,000	\$ 136,000	\$ 138,000
3 Field Work/Supply Donations	\$ 46,125	\$ 46,125	\$ 46,125	\$ 46,125	\$ 46,125
4 ARTS Tax	\$ 16,500	\$ 16,995	\$ 17,505	\$ 18,030	\$ 18,571
5 Run4TheArts	\$ 24,000	\$ 24,000	\$ 24,000	\$ 24,000	\$ 24,000
6 Fundraising/Event Income	\$ 42,000	\$ 44,500	\$ 47,000	\$ 49,500	\$ 52,000
7 ESSER III Funding	\$ 53,500	\$ -	\$ -	\$ -	\$ -
8 CIP - ESSA Grant Funding	\$ 40,000	\$ -	\$ -	\$ -	\$ -
Total Income	\$ 2,204,613	\$ 2,171,682	\$ 2,233,934	\$ 2,297,918	\$ 2,363,687
EXPENSES					
20 Salaries	\$ 1,114,000	\$ 1,071,000	\$ 1,103,130	\$ 1,136,224	\$ 1,170,311
21 Payroll Taxes	\$ 94,690	\$ 91,035	\$ 93,766	\$ 96,579	\$ 99,476
22 PERS contribution	\$ 222,800	\$ 214,200	\$ 231,657	\$ 238,607	\$ 257,468
23 Benefits	\$ 150,000	\$ 161,250	\$ 173,344	\$ 186,345	\$ 200,320
24 Substitute Teachers	\$ 4,800	\$ 4,944	\$ 5,092	\$ 5,245	\$ 5,402
25 Contracted Instruction Services	\$ 45,000	\$ 46,350	\$ 47,741	\$ 49,173	\$ 50,648
26 Repairs & Maintenance & Janitorial	\$ 50,400	\$ 51,912	\$ 43,469	\$ 55,073	\$ 46,726
27 Telephone & Internet	\$ 7,800	\$ 8,034	\$ 8,275	\$ 8,523	\$ 8,779
28 Printing and Binding	\$ 6,000	\$ 6,180	\$ 6,365	\$ 6,556	\$ 6,753
29 Professional Development	\$ 9,000	\$ 9,270	\$ 9,548	\$ 9,835	\$ 10,130
30 Supplies and Materials	\$ 65,000	\$ 66,950	\$ 68,959	\$ 71,027	\$ 68,158
31 Professional Fees (audit/legal etc.)	\$ 18,000	\$ 18,540	\$ 19,096	\$ 19,669	\$ 20,259
32 Insurance (Liability, Prop, Student)	\$ 23,000	\$ 23,690	\$ 24,401	\$ 25,133	\$ 25,887
33 Dues and Fees	\$ 10,000	\$ 10,300	\$ 10,609	\$ 10,927	\$ 11,255
34 Bank Fees	\$ 4,000	\$ 4,120	\$ 4,244	\$ 4,371	\$ 4,502
35 Utilities (Garbage)	\$ 4,000	\$ 4,120	\$ 4,244	\$ 4,371	\$ 4,502
36 Overnight Field Trips	\$ 25,000	\$ 25,750	\$ 26,523	\$ 27,318	\$ 28,138
37 Fundraising Expenses	\$ 15,000	\$ 15,450	\$ 15,914	\$ 16,391	\$ 16,883
38 Facility - Building (Lease & CAM only)	\$ 255,600	\$ 264,000	\$ 270,000	\$ 278,400	\$ 284,400
39 Facility - Lease Imp/Alarm	\$ 1,000	\$ 1,030	\$ 1,061	\$ 1,093	\$ 1,126
40 Parking Expense	\$ 27,500	\$ 28,325	\$ 29,175	\$ 30,050	\$ 30,951
41 Board Expenses	\$ 1,500	\$ 1,545	\$ 1,591	\$ 1,639	\$ 1,688
Total Expenses	\$ 2,154,090	\$ 2,127,995	\$ 2,198,202	\$ 2,282,549	\$ 2,353,762
Net Income:	\$ 50,523	\$ 43,687	\$ 35,732	\$ 15,369	\$ 9,925

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RENEWAL APPLICATION SIGNATURES

By signing this application, you assure the information provided is accurate to the best of your knowledge and you affirm your intent to continue operating a public charter school if approved for renewal.

Charter School Director/Administrator

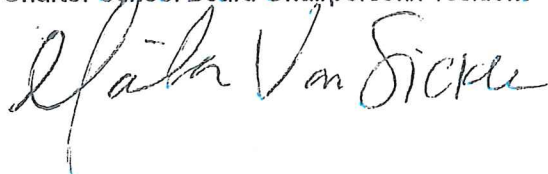
Date



12/30/22

Charter School Board Chairperson/President

Date



12/30/22

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**State Board of Education
Public Charter School Performance Framework
And Annual Evaluation Report**

**Cottonwood School of
Civics and Science
2021-22**



**Oregon Department of Education
255 Capitol St NE
Salem, OR 97310**

**Prepared by Kristen Miles
Board Development Specialist
Oregon Department of Education**

Introduction

Across Oregon, public charter schools provide additional options for students and families. The State Board of Education is a public charter school authorizer, or “sponsor” in the state as an appellate governing body. If an application to establish a public charter school is denied by a local school district, the charter school developers may appeal the district decision to the State Board of Education. If the application is deemed to meet the criteria, it is possible for the charter school to be authorized by the State Board of Education. While the state provides oversight and support to its sponsored charters, each charter school has autonomy over its budget, hiring, and the development and implementation of its educational program.

The State Board of Education is responsible for maintaining high standards for its sponsored charter schools, and for ensuring that charter schools are not only compliant with all applicable laws, but that their academic programs are successful, they are financially viable, and their organizations are effective and responsibly managed. The State Board of Education is particularly interested in analyzing equity issues within public charter schools and may continue to refine the tools with which it uses to evaluate a public charter school’s effectiveness and quality.

In so doing, the State Board of Education has established the following performance framework, which is largely derived from the Core Performance Framework and Guidance developed by the National Association of Charter School Authorizers (NACSA). This performance framework is designed to measure each charter school’s academic, financial, and organizational performance, and to “...guide practice, assess progress, and inform decision-making over the course of the charter term and at renewal”.¹

Because each charter school’s story and perspective on its own performance are critical to a balanced evaluation process, each measure includes space for narrative explanation and/or further description from both the State Board and the charter school. It is our hope and goal that each charter school will fully engage in the process of program evaluation each year and at the renewal period, and that this process contributes to the continuous improvement of each State Board of Education public charter school.



Kate Pattison
Program Analyst
Oregon Department of Education

¹ From NACSA’s Core Performance Framework and Guidance.
CSCS Framework 2021-22

Academic performance: data elements and sources

The purpose of the Academic Performance section of the Annual Report is to evaluate whether or not the charter school's educational program is showing success with its students.

Many of the indicators for this section are adopted from the National Association of Charter School Authorizers' "Core Performance Framework and Guidance", while the performance targets and ratings are aligned with the targets and ratings in the Oregon Report Card.

The following data elements and sources are used to complete the Academic Performance analysis:

- The charter school's Oregon Report Card
- The charter school's contract
- The charter school's whole school growth and performance on standardized tests in ELA and MATH
- The charter school's subgroup growth and performance on standardized tests in ELA and MATH
- The district's Oregon Report Card (for the district in which the charter school is located)
- Performance and growth information for comparison schools, as defined by the Oregon Department of Education
- The school's graduation rate (where applicable)
- The district's graduation rate (where applicable)
- The school's completion rate (where applicable)
- The district's completion rate (where applicable)
- The school's dropout rate (where applicable)
- The district's dropout rate (where applicable)
- The graduation, completion, and dropout rates of comparison schools, as defined by ODE (where applicable)
- The charter school's alignment to Common Core State Standards as evidenced by course syllabi, course descriptions, curriculum alignments, etc. (where applicable)

Academic Performance

1. Oregon School Rating System

Measure 1a Is the school meeting acceptable standards according to the Oregon State school rating system?
Exceeds standard: <input type="checkbox"/> School received the highest rating from the state accountability system.
Meets standard: <input type="checkbox"/> School received the highest rating from the state accountability system.
Does not meet standard: <input type="checkbox"/> School did not receive passing rating from the state accountability system.
Falls far below standard: <input type="checkbox"/> School identified for intervention or considered failing by the state accountability system.
State Board of Education comments: N/A. Not rated for the 2021-22 school year.
School comments:

Measure 1b Is the school meeting state designation expectations as set forth by the state and federal accountability system?
Exceeds standard: <input type="checkbox"/> School was identified as a "Model" school.
Meets standard: <input type="checkbox"/> School does not have a designation.
Does not meet standard: <input type="checkbox"/> School was identified as a "Focus" school.
Falls far below standard: <input type="checkbox"/> School was identified as a "Priority" school.
State Board of Education comments: N/A. Not rated for the 2021-22 school year.
School comments:

Measure 1c

How are **Economically Disadvantaged** students achieving on state assessments in ELA compared to the **Economically Disadvantaged** students in like-schools?

Exceeds standard:

School's average subgroup achievement rate exceeds the average district performance of students in the same subgroup in the same grades by at least 10%.

Meets standard:

School's average subgroup achievement rate meets or exceeds the average district performance of students in the same subgroup in the same grades by up to 10%.

Does not meet standard:

School's average subgroup achievement rate is less than the average district performance of students in the same subgroup in the same grades by 1-10%.

Falls far below standard:

School's average subgroup achievement rate is less than the average district performance of students in the same subgroup in the same grades by 10% or more.

State Board of Education comments: Cottonwood had 74.0% of students identified as economically disadvantaged meet standard on the ELA state assessment in grades 3-8 as compared to 55.8% of PPS students in the same group for the same grades.

School comments:

Measure 1d

How are **Economically Disadvantaged** students achieving on state assessments in MATH compared to the **Economically Disadvantaged** students in like-schools?

Exceeds standard:

School's average subgroup achievement rate exceeds the average district performance of students in the same subgroup in the same grades by at least 10%.

Meets standard:

School's average subgroup achievement rate meets or exceeds the average district performance of students in the same subgroup in the same grades by up to 10%.

Does not meet standard:

School's average subgroup achievement rate is less than the average district performance of students in the same subgroup in the same grades by 1-10%.

Falls far below standard:

School's average subgroup achievement rate is less than the average district performance of students in the same subgroup in the same grades by 10% or more.

State Board of Education comments: Cottonwood had 46.0% of students identified as economically disadvantaged meet standard on the MATH state assessment in grades 3-8 as compared to 45.4% of PPS students in the same group for the same grades.

School comments:

Measure 1e

How are **English Learners** achieving on state assessments in ELA compared to the **English Learners** in like-schools?

Exceeds standard:

School's average subgroup achievement rate exceeds the average district performance of students in the same subgroup in the same grades by at least 10%.

Meets standard:

School's average subgroup achievement rate meets or exceeds the average district performance of students in the same subgroup in the same grades by up to 10%.

Does not meet standard:

School's average subgroup achievement rate is less than the average district performance of students in the same subgroup in the same grades by 1-10%.

Falls far below standard:

School's average subgroup achievement rate is less than the average district performance of students in the same subgroup in the same grades by 10% or more.

State Board of Education comments: N/A. Not rated for the 2021-22 school year.

School comments:

Measure 1f

How are **English Learners** achieving on state assessments in MATH compared to the **English Learners** in like-schools?

Exceeds standard:

School's average subgroup achievement rate exceeds the average district performance of students in the same subgroup in the same grades by at least 10%.

Meets standard:

School's average subgroup achievement rate meets or exceeds the average district performance of students in the same subgroup in the same grades by up to 10%.

Does not meet standard:

School's average subgroup achievement rate is less than the average district performance of students in the same subgroup in the same grades by 1-10%.

Falls far below standard:

School's average subgroup achievement rate is less than the average district performance of students in the same subgroup in the same grades by 10% or more.

State Board of Education comments: N/A. Not rated for the 2021-22 school year.

School comments:

Measure 1g

How are **Students with Disabilities** achieving on state assessments in ELA compared to the **Students with Disabilities** in like-schools?

Exceeds standard:

School's average subgroup achievement rate exceeds the average district performance of students in the same subgroup in the same grades by at least 10%.

Meets standard:

School's average subgroup achievement rate meets or exceeds the average district performance of students in the same subgroup in the same grades by up to 10%.

Does not meet standard:

School's average subgroup achievement rate is less than the average district performance of students in the same subgroup in the same grades by 1-10%.

Falls far below standard:

School's average subgroup achievement rate is less than the average district performance of students in the same subgroup in the same grades by 10% or more.

State Board of Education comments: Cottonwood had 60.0% of students identified as students with disabilities meet standard on the ELA state assessment in grades 3-8 as compared to 32.7% of PPS students in the same group for the same grades.

School comments:

Measure 1h

How are **Students with Disabilities** achieving on state assessments in MATH compared to the **Students with Disabilities** in like-schools?

Exceeds standard:

School's average subgroup achievement rate exceeds the average district performance of students in the same subgroup in the same grades by at least 10%.

Meets standard:

School's average subgroup achievement rate meets or exceeds the average district performance of students in the same subgroup in the same grades by up to 10%.

Does not meet standard:

School's average subgroup achievement rate is less than the average district performance of students in the same subgroup in the same grades by 1-10%.

Falls far below standard:

School's average subgroup achievement rate is less than the average district performance of students in the same subgroup in the same grades by 10% or more.

State Board of Education comments: Cottonwood had 51.4% of students identified as students with disabilities meet standard on the MATH state assessment in grades 3-8 as compared to 26.8% of PPS students in the same group for the same grades.

School comments:

Measure 1i

How are **Students of Underserved Races/Ethnicities** achieving on state assessments in ELA compared to the **Students of Underserved Races/Ethnicities** in like-schools?

Exceeds standard:

School's average subgroup achievement rate exceeds the average district performance of students in the same subgroup in the same grades by at least 10%.

Meets standard:

School's average subgroup achievement rate meets or exceeds the average district performance of students in the same subgroup in the same grades by up to 10%.

Does not meet standard:

School's average subgroup achievement rate is less than the average district performance of students in the same subgroup in the same grades by 1-10%.

Falls far below standard:

School's average subgroup achievement rate is less than the average district performance of students in the same subgroup in the same grades by 10% or more.

State Board of Education comments: Cottonwood had 62.5% of students identified as underserved races/ethnicities meet standard on the ELA state assessment in grades 3-8 as compared to 26.4% of PPS students in the same group for the same grades.

School comments:

Measure 1j

How are **Students of Underserved Races/Ethnicities** achieving on state assessments in MATH compared to the **Students of Underserved Races/Ethnicities** in like-schools?

Exceeds standard:

School's average subgroup achievement rate exceeds the average district performance of students in the same subgroup in the same grades by at least 10%.

Meets standard:

School's average subgroup achievement rate meets or exceeds the average district performance of students in the same subgroup in the same grades by up to 10%.

Does not meet standard:

School's average subgroup achievement rate is less than the average district performance of students in the same subgroup in the same grades by 1-10%.

Falls far below standard:

School's average subgroup achievement rate is less than the average district performance of students in the same subgroup in the same grades by 10% or more.

State Board of Education comments: Cottonwood had 12.5% of students identified as underserved races/ethnicities meet standard on the MATH state assessment in grades 3-8 as compared to 17.6% of PPS students in the same group for the same grades.

School comments:

2. Student Academic Growth

Measure 2a

Are All students making expected annual academic growth in ELA compared to their peers?
(Combined Median Growth Percentile-CMGP)

Exceeds standard:

Combined median growth percentile of 60 or more.

Meets standard:

Combined median growth percentile of between 35 and 59.5.

Does not meet standard:

Combined median growth percentile of between 30 and 34.5.

Falls far below standard:

Combined median growth percentile of lower than 30.

State Board of Education comments: N/A. Not rated for the 2021-22 school year.

School comments:

Measure 2b

Are students making expected annual academic growth in MATH compared to their peers? (Combined Median Growth Percentile)

Exceeds standard:

Combined median growth percentile of 60 or more.

Meets standard:

Combined median growth percentile of between 35 and 59.5.

Does not meet standard:

Combined median growth percentile of between 30 and 34.5.

Falls far below standard:

Combined median growth percentile of lower than 30.

State Board of Education comments: N/A. Not rated for the 2021-22 school year.

School comments:

3. Subgroup Growth

Measure 3a

Is the school increasing academic performance in ELA over time for **Economically Disadvantaged** students? (Combined Median Growth Percentile)

Exceeds standard:

Combined median growth percentile of 60 or more.

Meets standard:

Combined median growth percentile of between 35 and 59.5.

Does not meet standard:

Combined median growth percentile of between 30 and 34.5.

Falls far below standard:

Combined median growth percentile of lower than 30.

State Board of Education comments: N/A. Not rated for the 2021-22 school year.

School comments:

Measure 3b

Is the school increasing academic performance in MATH over time for **Economically Disadvantaged** students? (Combined Median Growth Percentile)

Exceeds standard:

Combined median growth percentile of 60 or more.

Meets standard:

Combined median growth percentile of between 35 and 59.5.

Does not meet standard:

Combined median growth percentile of between 30 and 34.5.

Falls far below standard:

Combined median growth percentile of lower than 30.

State Board of Education comments: N/A. Not rated for the 2021-22 school year.

School comments:

Measure 3c

Is the school increasing academic performance in ELA over time for **English Learner** students?
(Combined median Growth Percentile)

Exceeds standard:

Combined median growth percentile of 60 or more.

Meets standard:

Combined median growth percentile of between 35 and 59.5.

Does not meet standard:

Combined median growth percentile of between 30 and 34.5.

Falls far below standard:

Combined median growth percentile of lower than 30.

State Board of Education comments: N/A. Not rated for the 2021-22 school year.

School comments:

Measure 3d

Is the school increasing academic performance in MATH over time for **English Learner** students?
(Combined median Growth Percentile)

Exceeds standard:

Combined median growth percentile of 60 or more.

Meets standard:

Combined median growth percentile of between 35 and 59.5.

Does not meet standard:

Combined median growth percentile of between 30 and 34.5.

Falls far below standard:

Combined median growth percentile of lower than 30.

State Board of Education comments: N/A. Not rated for the 2021-22 school year.

School comments:

Measure 3e

Is the school increasing academic performance in ELA over time for **Students with Disabilities?**
(Combined Median Growth Percentile)

Exceeds standard:

Combined median growth percentile of 60 or more.

Meets standard:

Combined median growth percentile of between 35 and 59.5.

Does not meet standard:

Combined median growth percentile of between 30 and 34.5.

Falls far below standard:

Combined median growth percentile of lower than 30.

State Board of Education comments: N/A. Not rated for the 2021-22 school year.

School comments:

Measure 3f

Is the school increasing academic performance in MATH over time for **Students with Disabilities?**
(Combined Median Growth Percentile)

Exceeds standard:

Combined median growth percentile of 60 or more.

Meets standard:

Combined median growth percentile of between 35 and 59.5.

Does not meet standard:

Combined median growth percentile of between 30 and 34.5.

Falls far below standard:

Combined median growth percentile of lower than 30.

State Board of Education comments: N/A. Not rated for the 2021-22 school year.

School comments:

Measure 3g

Is the school increasing academic performance in ELA over time for students of **Underserved Races/Ethnicities**? (Combined Median Growth Percentile)

Exceeds standard:

Combined median growth percentile of 60 or more.

Meets standard:

Combined median growth percentile of between 35 and 59.5.

Does not meet standard:

Combined median growth percentile of between 30 and 34.5.

Falls far below standard:

Combined median growth percentile of lower than 30.

State Board of Education comments: N/A. Not rated for the 2021-22 school year.

School comments:

Measure 3h

Is the school increasing academic performance in MATH over time for students of **Underserved Races/Ethnicities**? (Combined Median Growth Percentile)

Exceeds standard:

Combined median growth percentile of 60 or more.

Meets standard:

Combined median growth percentile of between 35 and 59.5.

Does not meet standard:

Combined median growth percentile of between 30 and 34.5.

Falls far below standard:

Combined median growth percentile of lower than 30.

State Board of Education comments: N/A. Not rated for the 2021-22 school year.

School comments:

4. Alignment of Curriculum to Common Core State Standards

Measure 4a Is the school aligning curriculum to Common Core State Standards?
Meets standard: <input checked="" type="checkbox"/> School is offering all required core subjects and has aligned all classes in core subjects to Common Core State Standards, and has articulated this through detailed syllabi, course descriptions, curriculum alignments, or other methods.
Does not meet standard: <input type="checkbox"/> School is offering all required core subjects but has not fully aligned all classes in core subjects to Common Core State Standards, and/or has not provided evidence of this through detailed syllabi, course descriptions, curriculum alignments, or other methods.
Falls far below standard: <input type="checkbox"/> School is not offering all required core subjects and/or has not aligned all classes in core subjects to Common Core State Standards, and has not provided evidence of this through detailed syllabi, course descriptions, curriculum alignments, or other methods.
State Board of Education comments: CSCS has done excellent work in aligning the curriculum to PBE standards. CSCS continues to work on aligning the PBE curriculum to CCSS. Reading grade level plans and Writing standards are some of the alignment resources.
School comments: We adopted I-Ready for math summer of 2021

5. Graduation and post-secondary readiness (high schools only)

Measure 5a What percentage of students is graduating within four years of entering high school as compared to other schools in like-schools?
Exceeds standard: <input type="checkbox"/> School's average graduation rate exceeds the average district graduation rate by at least 10%.
Meets standard: <input type="checkbox"/> School's average graduation rate meets or exceeds the average district graduation rate by up to 10%.
Does not meet standard: <input type="checkbox"/> School's average graduation rate is less than the average district graduation rate by 1-10%.
Falls far below standard: <input type="checkbox"/> School's average graduation rate is less than the average district graduation rate by 10% or more.
State Board of Education comments: N/A
School comments:

Measure 5b

What percentage of students is graduating within four years of entering high school as compared to their peers in like schools?

Exceeds standard:

School's average graduation rate exceeds the average graduation rate of their peers in like schools by at least 10%.

Meets standard:

School's average graduation rate meets or exceeds the average graduation rate of their peers in like schools by up to 10%.

Does not meet standard:

School's average graduation rate is less than the average graduation rate of their peers in like schools by 1-10%.

Falls far below standard:

School's average graduation rate is less than the average graduation rate of their peers in like schools by 10% or more.

State Board of Education comments: N/A

School comments:

Measure 5c

What percentages of students receive a regular, modified, extended, or adult high school diploma or complete a GED within five years of entering high school as compared to other schools in like-schools?

Exceeds standard:

School's average completion rate exceeds the average district completion rate by at least 10%.

Meets standard:

School's average completion rate meets or exceeds the average district completion rate by up to 10%.

Does not meet standard:

School's average completion rate is less than the average district completion rate by 1-10%.

Falls far below standard:

School's average completion rate is less than the average district completion rate by 10% or more.

State Board of Education comments: N/A

School comments:

Measure 5d

What percentages of students receive a regular, modified, extended, or adult high school diploma or complete a GED within five years of entering high school as compared to their peers in like schools?

Exceeds standard:

School's average completion rate exceeds the average completion rate of their peers in like schools by at least 10%.

Meets standard:

School's average completion rate meets or exceeds the average completion rate of their peers in like schools by up to 10%.

Does not meet standard:

School's average completion rate is less than the average completion rate of their peers in like schools by 1-10%.

Falls far below standard:

School's average completion rate is less than the average completion rate of their peers in like schools by 10% or more.

State Board of Education comments: N/A

School comments:

Measure 5e

What percentage of students dropped out during the school year and did not re-enroll as compared to other schools in like-schools?

Exceeds standard:

School's average dropout rate is less than the average district dropout rate by 4% or more.

Meets standard:

School's average dropout rate meets or is less than the average district dropout rate by up to 4%.

Does not meet standard:

School's average dropout rate exceeds the average district dropout rate by 1-4%.

Falls far below standard:

School's average dropout rate exceeds the average district dropout rate by 4% or more.

State Board of Education comments: N/A

School comments:

Measure 5f

What percentage of students dropped out during the school year and did not re-enroll as compared to their peers in like schools?

Exceeds standard:

School's average dropout rate is less than the average dropout rate of their peers in like schools by 4% or more.

Meets standard:

School's average dropout rate meets or is less than the average dropout rate of their peers in like schools by up to 4%.

Does not meet standard:

School's average dropout rate exceeds the average dropout rate of their peers in like schools by 1-4%.

Falls far below standard:

School's average dropout rate exceeds the average dropout rate of their peers in like schools by 4% or more.

State Board of Education comments: N/A

School comments:

COMMENDATIONS: ACADEMIC PERFORMANCE

1. Relied heavily on place-based curriculum during the pandemic, which was beneficial to the program and students
2. Very responsive to student and family needs during the pandemic
3. Partnered with Antioch and is planning to offer a masters level class to their teachers
4. Introduction of indigenous curriculum impact school culture and representation positively

RECOMMENDATIONS: ACADEMIC PERFORMANCE

Financial Performance: data elements and sources

The purpose of the Financial Performance section of the Annual Report is to evaluate whether or not the charter school is financially viable.

Many of the indicators, performance targets, and ratings for this section are adopted from the National Association of Charter School Authorizers' "Core Performance Framework and Guidance".

The following data elements and sources are used to complete the Financial Performance analysis:

- The charter school's contract
- The charter school's audited balance sheet and notes for the last three years
- The charter school's projected enrollment and actual enrollment
- The charter school's board-adopted budget
- The charter school's audited income statement and audited cash flow statement
- Annual principal and interest obligations
- Quarterly financial statements, including budget-to-actuals, profit and loss, balance sheet

Financial Performance

7. Near-Term Measures

Measure 7a Current ratio: Current assets divided by current liabilities.
Meets standard: <input checked="" type="checkbox"/> Current ratio is greater than or equal to 1.1.
Does not meet standard: <input type="checkbox"/> Current ratio is between .9 and 1.0 or equals 1.0.
Falls far below standard: <input type="checkbox"/> Current ratio is less than or equal to .9.
State Board of Education comments: As of June 30, 2021, current ratio is at 3.63
School comments:

Measure 7b Unrestricted days cash: Unrestricted cash divided by (total expenses minus depreciation expense / 365).
Meets standard: <input checked="" type="checkbox"/> 60 days cash.
Does not meet standard: <input type="checkbox"/> Days cash is between 15 and 30 days.
Falls far below standard: <input type="checkbox"/> Fewer than 15 days cash.
State Board of Education comments: As of June 30, 2021, the school's unrestricted days cash is over 100
School comments:

Measure 7c Enrollment variance: actual enrollment divided by enrollment projection in charter school board-approved budget.
Meets standard: <input type="checkbox"/> Enrollment variance equals or exceeds 95% in the most recent year.
Does not meet standard: <input type="checkbox"/> Enrollment variance is between 85-95% in the most recent year.
Falls far below standard: <input type="checkbox"/> Enrollment variance is less than 85% in the most recent year.
State Board of Education comments: This was not rated for the 2021-22 school year. Data was not collected.
School comments:

Measure 7d Default
Meets standard: <input checked="" type="checkbox"/> School is not in default of loan covenant(s) and/or is not delinquent with debt service payments.
Falls far below standard: <input type="checkbox"/> School is in default of loan covenant(s) and/or is delinquent with debt service payments.
State Board of Education comments: The school did not report default or delinquent debt.
School comments:

8. Sustainability Measures

Measure 8a Total Margin: Net income divided by total revenue. Aggregated total margin: Total 3-year net income divided by total 3-year revenues.
Meets standard: <input checked="" type="checkbox"/> Aggregated 3-year total margin is positive and the most recent year total margin is positive.
Does not meet standard: <input type="checkbox"/> Aggregated 3-year total margin is greater than -1.5%, but trend does not “meet standard” (above).
Falls far below standard: <input type="checkbox"/> Aggregated three-year total margin is less than or equal to -1.5% and the most recent year total margin is less than -10%.
State Board of Education comments: As of June 30, 2021, the school’s aggregated total margin is 18.0% The total margin is 16%.
School comments:

Measure 8b Debt to asset ratio: Total liabilities divided by total assets.
Meets standard: <input checked="" type="checkbox"/> Debt-to-asset ratio is less than .9.
Does not meet standard: <input type="checkbox"/> Debt-to-asset ratio is between .9 and 1.0.
Falls far below standard: <input type="checkbox"/> Debt-to-asset ratio is greater than 1.0.
State Board of Education comments: As of June 30, 2021, the school’s debt to asset ratio is 0.33 with the PERS numbers removed.
School comments:

<p>Measure 8c Cash flow: Multi-year cash flow = Year 3 total cash - Year 1 total cash. One-year cash flow: Year 2 total cash - Year 1 total cash.</p>
<p>Meets standard: <input checked="" type="checkbox"/> Multi-year cumulative cash flow is positive and cash flow is positive each year.</p>
<p>Does not meet standard: <input type="checkbox"/> Multi-year cumulative cash flow is positive, but trend does not “meet standard” (above).</p>
<p>Falls far below standard: <input type="checkbox"/> Multi-year cumulative cash flow is negative.</p>
<p>State Board of Education comments: As of June 30, 2021, the school’s multi-year cash flow is \$777,483 and one-year cash flow is \$504,429.</p>
<p>School comments:</p>

<p>Measure 8d Debt service coverage ratio: (net income + depreciation + interest expense) / (annual principal, interest, and lease payments).</p>
<p>Meets standard: <input type="checkbox"/> Debt service coverage ratio is equal to or exceeds 1.1.</p>
<p>Does not meet standard: <input type="checkbox"/> Debt service coverage ratio is less than 1.1.</p>
<p>State Board of Education comments: N/A</p>
<p>School comments:</p>

<p>Measure 8e Is the school meeting financial reporting and compliance requirements?</p>
<p>Meets standard: <input checked="" type="checkbox"/> The school materially complies with applicable laws, rules, regulations, and provisions of the charter contract relating to financial reporting requirements, including, but not limited to:</p> <ul style="list-style-type: none"> • Complete and timely submission of financial reports, including: annual budget, revised budgets (when applicable), quarterly financial reports, and annual municipal audit. • All other reporting requirements related to the use of public funds.
<p>Does not meet standard: <input type="checkbox"/> The school was materially out of compliance with applicable laws, rules, regulations, and/or provisions of the charter contract relating to financial reporting requirements, including, but not limited to:</p> <ul style="list-style-type: none"> • Complete and timely submission of financial reports, including: annual budget, revised budgets (when applicable), quarterly financial reports, and annual municipal audit. • All other reporting requirements related to the use of public funds.
<p>State Board of Education comments: The school either submitted everything on time or with an approved extension.</p>
<p>School comments:</p>

Measure 8f

Is the school following Generally Accepted Accounting Principles (GAAP)?

Meets standard:

The school materially complies with applicable laws, rules, regulations, and provisions of the charter contract relating to financial management and oversight expectations by an annual independent audit, including, but not limited to:

- An unqualified audit opinion
- An audit devoid of significant findings and conditions, material weaknesses, or significant internal control weaknesses
- An audit that does not include a going concern disclosure in the notes or an explanatory paragraph within the audit report

Does not meet standard:

The school was materially out of compliance with applicable laws, rules, regulations, and/or provisions of the charter contract relating to financial management and oversight expectations by an annual independent audit, including, but not limited to:

- An qualified audit opinion
- An audit containing significant findings or conditions, material weaknesses, or significant internal control weaknesses
- An audit that included a going concern disclosure in the notes or an explanatory paragraph within the audit report

State Board of Education comments: The 2021 audit does not identify any significant deficiencies.

School comments:

COMMENDATIONS: FINANCIAL PERFORMANCE

1. Current debt to asset ratio is well above target.
2. School has well over 60 days cash on hand.

RECOMMENDATIONS: FINANCIAL PERFORMANCE

Organizational Performance: data elements and sources

The purpose of the Organizational Performance section of the Annual Evaluation is to evaluate whether or not the charter school as an organization is effectively governed and well run.

Many of the indicators, performance targets, and ratings for this section are adopted from the National Association of Charter School Authorizers' "Core Performance Framework and Guidance".

The following data elements and sources are used to complete the Organizational Performance analysis:

- Site visit observations (both formal and informal)
- The charter school's contract
- Required reporting by the charter school, including all deliverables
- The school's adherence to deliverable and reporting due dates
- Feedback from parents, students, charter school staff, and other community stakeholders
- Student accounting reports
- The charter school's internal accountability systems
- Student enrollment forms
- The charter school's adopted board policies
- The charter school's parent/student/staff handbooks
- TSPC
- Assurances by the charter school and governing board that it is compliant with all applicable requirements

Organizational Performance

10. Education Program

Measure 10a

Is the school implementing the material terms of the education program as defined in the current charter contract?

Meets standard:

The school implemented the material terms of the education program in all material aspects and the education program in operation reflects the material terms as defined in the charter contract, or the school has gained approval for a modification to the material terms.

Does not meet standard:

The school failed to implement the material terms of the education program in all material aspects and the education program in operation does not reflect the material terms as defined in the charter contract, or the schools implemented a modification to the material terms without approval and/or a mutually agreeable amendment to the contract.

State Board of Education comments: CSCS is demonstrating integrity to all elements of the education program as spelled out in its charter. The focus of CSCS is PBE and all evidence supports this educational philosophy is the focal point of the school's curriculum, staffing, budget and schedule.

School comments:

Measure 10b

Is the school complying with applicable education requirements?

Meets standard:

The school materially complies with applicable laws, rules, regulations, and provisions of the charter contract relating to education requirements, including, but not limited to:

- Instructional days and/or minutes requirements
- Graduation and promotion requirements
- Content standards, including Common Core State Standards
- The administration of state assessments
- Implementation of mandated programming as a result of state or federal funding

Does not meet standard:

The school was materially out of compliance with applicable laws, rules, regulations, and/or provisions of the charter contract relating to education requirements, including, but not limited to:

- Instructional days and/or minutes requirements
- Graduation and promotion requirements
- Content standards, including Common Core State Standards
- The administration of state assessments
- Implementation of mandated programming as a result of state or federal funding

State Board of Education comments: CSCS has complied with all applicable education requirements.

School comments:

Measure 10c

Is the school protecting the rights of students with disabilities?

Meets standard:

Consistent with the school's status as a school in a district LEA, the school materially complies with applicable laws, rules, regulations, and provisions of the charter contract (including the Individuals with Disabilities Education Act, Section 504 of the Rehabilitation Act of 1973, and the Americans with Disabilities Act) relating to the treatment of students with identified disabilities and those suspected of having a disability, including, but not limited to:

- Equitable access and opportunity to enroll
- Identification and referral
- Appropriate involvement with development and implementation of Individualized Education Plans, and appropriate development of Section 504 plans
- Operational compliance, including appropriate inclusion in the school's academic program, assessments, and extracurricular activities.
- Discipline, including due process protections, manifestation determinations, and behavioral intervention plans
- Access to the school's facility and program to students in a lawful manner and consistent with students' IEPs or 504 plans

Does not meet standard:

Consistent with the school's status as a school in a district LEA, the school was materially out of compliance with one or more applicable laws, rules, regulations, and provisions of the charter contract (including the Individuals with Disabilities Education Act, Section 504 of the Rehabilitation Act of 1973, and the Americans with Disabilities Act) relating to the treatment of students with identified disabilities and those suspected of having a disability, including, but not limited to:

- Equitable access and opportunity to enroll
- Identification and referral
- Appropriate involvement with development and implementation of Individualized Education Plans, and appropriate development of Section 504 plans
- Operational compliance, including appropriate inclusion in the school's academic program, assessments, and extracurricular activities.
- Discipline, including due process protections, manifestation determinations, and behavioral intervention plans
- Access to the school's facility and program to students in a lawful manner and consistent with students' IEPs or 504 plans

State Board of Education comments: PPS provides a full-time Learning Specialist for students with disabilities. Students and staff also receive support from a Speech Pathologist, Psychologist, and Occupational Therapist. CSCS's curriculum, dedicated staff and school philosophy are additional ways in which Students with Disabilities are served. The school handbook, board policies, staff handbook, schedule and facility are all in compliance with all applicable laws, rules, regulation and provisions of the charter contract.

School comments:

1.5 Learning Specialist
Speech path, 3 days p/week
Psych, 1 day p/week
OT - consultation model

Measure 10d

Is the school protecting the rights of English Language Learner students?

Meets standard:

The school materially complies with applicable laws, rules, regulations, and provisions of the charter contract (including Title III of the Elementary and Secondary Education Act, and US Department of Education authorities) relating to requirements of English Language Learners, including, but not limited to:

- Equitable access and opportunity to enroll
- Development and implementation of required plans related to the service of ELL students
- Proper steps for identification of students in need of ELL services
- Appropriate and equitable delivery of services to identified students
- Appropriate accommodations on assessments
- Exiting of students from ELL services
- Ongoing monitoring of exited students

Does not meet standard:

The school failed to comply with one or more applicable laws, rules, regulations, and/or provisions of the charter contract (including Title III of the Elementary and Secondary Education Act, and US Department of Education authorities) relating to requirements of English Language Learners, including, but not limited to:

- Equitable access and opportunity to enroll
- Development and implementation of required plans related to the service of ELL students
- Proper steps for identification of students in need of ELL services
- Appropriate and equitable delivery of services to identified students
- Appropriate accommodations on assessments
- Exiting of students from ELL services
- Ongoing monitoring of exited students

State Board of Education comments: The school uses the Home Language Survey with the enrollment package. The school has an approved EL Plan on file with ODE

School comments:

11. Governance and Reporting

Measure 11a

Is the school complying with applicable governance requirements?

Meets standard:

The school materially complies with applicable laws, rules, regulations, and provisions of the charter contract relating to governance by its board, including, but not limited to:

- Board policies
- Board bylaws
- State open meetings law
- Code of ethics
- Conflicts of interest
- Board composition and/or membership rules

Does not meet standard:

The school was materially out of compliance with applicable laws, rules, regulations, and/or provisions of the charter contract relating to governance by its board, including, but not limited to:

- Board policies
- Board bylaws
- State open meetings law
- Code of ethics
- Conflicts of interest
- Board composition and/or membership rules

State Board of Education comments: The CSCS's Board membership represents a wide range of expertise. (Accounting, legal, education, facilities etc.).

The school should consider putting board policies on the website

School comments:

Measure 11b

Is the school holding its administration accountable?

Meets standard:

The school materially complies with applicable laws, rules, regulations, provisions of the charter contract, and its own internal policies and practices relating to oversight of school administration, including, but not limited to:

- Board oversight of school administration that includes holding it accountable for performance expectations which may or may not be agreed to under a written performance agreement.
- The board conducting an annual evaluation of the administrator's performance.

Does not meet standard:

The school was materially out of compliance with applicable laws, rules, regulations, provisions of the charter contract, and its own internal policies and practices relating to oversight of school administration, including but not limited to:

- Board oversight of school administration that includes holding it accountable for performance expectations which may or may not be agreed to under a written performance agreement.
- The board conducting an annual evaluation of the administrator's performance.

State Board of Education comments: CSCS has a detailed job description for the school administrator. The Board is in the process of developing an annual performance evaluation.

School comments:

Measure 11c

Is the school complying with reporting requirements?

Meets standard:

The school materially complies with applicable laws, rules, regulations, and provisions of the charter contract relating to relevant reporting requirements to the district, and the Oregon Department of Education, including, but not limited to:

- Accountability planning and performance
- Attendance and enrollment reporting
- Compliance with the charter contract and all applicable laws
- Timely submission of all deliverables
- Additional information as requested by the district

Does not meet standard:

The school was materially out of compliance with applicable laws, rules, regulations, and/or provisions of the charter contract relating to relevant reporting requirements to the district, and the Oregon Department of Education, including, but not limited to:

- Accountability planning and performance
- Attendance and enrollment reporting
- Compliance with the charter contract and all applicable laws
- Timely submission of all deliverables
- Additional information as requested by the district

State Board of Education comments: CSCS has complied with all reporting requirements.

School comments:

12. Students and Employees

Measure 12a

Is the school protecting the rights of all students?

Meets standard:

The school materially complies with applicable laws, rules, regulations, and provisions of the charter contract relating to the rights of students, including, but not limited to:

- Policies and practices related to admissions, lottery, waiting lists, fair and open recruitment, and enrollment (including rights to enroll or maintain enrollment)
- The collection and protection of student information
- Due process protections, privacy, civil rights, and student liberties requirements, including First Amendment protections and the Establishment Clause restrictions prohibiting public schools from engaging in religious instruction
- Conduct of discipline (discipline hearings, and suspensions and expulsion policies and practices)

Does not meet standard:

The school was materially out of compliance with applicable laws, rules, regulations, and/or provisions of the charter contract relating to the rights of students, including, but not limited to:

- Policies and practices related to admissions, lottery, waiting lists, fair and open recruitment, and enrollment (including rights to enroll or maintain enrollment)
- The collection and protection of student information
- Due process protections, privacy, civil rights, and student liberties requirements, including First Amendment protections and the Establishment Clause restrictions prohibiting public schools from engaging in religious instruction
- Conduct of discipline (discipline hearings, and suspensions and expulsion policies and practices)

State Board of Education comments: CSCS complies with protecting the rights of all students as evidenced by board policy, family handbook, staff handbook, professional development, enrollment process and the education program. The school implements a Restorative Justice model of student discipline.

School comments:

Measure 12b

Is the school meeting teacher and other staff credentialing requirements?

Meets standard:

The school materially complies with applicable laws, rules, regulations, and provisions of the charter contract relating to state certification requirements, including the federal Highly Qualified Teacher and Paraprofessional requirements, charter school licensure and registry requirements, and background check and fingerprinting requirements for all staff and volunteers.

Does not meet standard:

The school was materially out of compliance with applicable laws, rules, regulations, and provisions of the charter contract relating to state certification requirements, including the federal Highly Qualified Teacher and Paraprofessional requirements, charter school licensure and registry requirements, and/or background check and fingerprinting requirements for all staff and volunteers.

State Board of Education comments:

School comments:

13. School Environment

Measure 13a

Is the school complying with facilities and transportation requirements?

Meets standard:

The school materially complies with applicable laws, rules, regulations, and provisions of the charter contract relating to the school facilities, grounds, and transportation, including, but not limited to:

- Americans with Disabilities Act
- Fire inspections and related records
- Viable certificate of occupancy or other required building use authorization
- Documentation of requisite insurance coverage
- Student transportation

Does not meet standard:

The school was materially out of compliance with applicable laws, rules, regulations, and provisions of the charter contract relating to the school facilities, grounds, and transportation, including, but not limited to:

- Americans with Disabilities Act
- Fire inspections and related records
- Viable certificate of occupancy or other required building use authorization
- Documentation of requisite insurance coverage
- Student transportation

State Board of Education comments: CSCS is housed in an industrial building that has been renovated to serve as a school. The creative use of space supports PBE mission and values. Because this setting is unique, it is recommended that the CSCS' Site Committee do an annual facilities walkthrough using safety and security checklist. CSCS has a current occupancy and insurance certification.

School comments: We do a yearly walkthrough using a safety & security checklist. It wasn't done this year due to covid restrictions.

Measure 13b

Is the school complying with health and safety requirements?

Meets standard:

The school materially complies with applicable laws, rules, regulations, and provisions of the charter contract relating to safety and the provision of health-related services, including, but not limited to:

- Appropriate nursing services and dispensing of pharmaceuticals
- Food service requirements

Does not meet standard:

The school was materially out of compliance with applicable laws, rules, regulations, and provisions of the charter contract relating to safety and the provision of health-related services, including, but not limited to:

- Appropriate nursing services and dispensing of pharmaceuticals
- Food service requirements

State Board of Education comments: CSCS complies with all health and safety requirements. This is evidenced by the Family and Staff Handbook, Board policy and interviews with school administration and administrative staff.

School comments:

Measure 13c

Is the school handling information appropriately?

Meets standard:

The school materially complies with applicable laws, rules, regulations, and provisions of the charter contract relating to the handling of information, including, but not limited to:

- Maintaining the security of and providing access to student records under the Family Educational Rights and Privacy Act (FERPA) and other applicable authorities
- Accessing documents maintained by the school under the state's Freedom of Information law and other applicable authorities
- Transferring of student records
- Proper and secure maintenance of testing materials

Does not meet standard:

The school was materially out of compliance with applicable laws, rules, regulations, and provisions of the charter contract relating to the handling of information, including, but not limited to:

- Maintaining the security of and providing access to student records under the Family Educational Rights and Privacy Act (FERPA) and other applicable authorities
- Accessing documents maintained by the school under the state's Freedom of Information law and other applicable authorities
- Transferring of student records
- Proper and secure maintenance of testing materials

State Board of Education comments: CSCS complies with all laws, rules, regulations and provisions of the charter contract relating to the handling of information. This is evidenced by the Family and Staff Handbook, Board policy and interviews with school administration and administrative staff.

School comments:

14. Additional Obligations**Measure 14a**

Is the school complying with all other obligations?

Meets standard:

The school materially complies with all other applicable legal, statutory, regulatory, or contractual requirements contained in the charter contract that are not otherwise explicitly stated herein, including, but not limited to requirements from the following sources:

- Revisions to state charter law
- Intervention requirements required by the district
- Action items assigned by the district
- Requirements by other entities to which the charter school is accountable (e.g. ODE)

Does not meet standard:

The school was materially out of compliance with applicable legal, statutory, regulatory, or contractual requirements contained in the charter contract that are not otherwise explicitly stated herein, included, but not limited to requirement from the following sources:

- Revisions to state charter law
- Intervention requirements required by the district
- Action items assigned by the district
- Requirements by other entities to which the charter school is accountable (e.g. ODE)

State Board of Education comments: The school was responsive to additional requests and updates to the law.

School comments:

COMMENDATIONS: ORGANIZATIONAL PERFORMANCE

1. Strong, supporting administrative team
2. Strong compliance with applicable requirements in law and contract.

RECOMMENDATIONS: ORGANIZATIONAL PERFORMANCE

1. Consider posting policies online.
2. Continue working on staff recruitment and retention.
3. Continue working on student, family, and staff diversity

SUMMARY OF ANNUAL EVALUATION COMMENDATIONS AND RECOMMENDATIONS

MEASURE	EXCEEDS STANDARD	MEETS STANDARD	DOES NOT MEET STANDARD	FALLS FAR BELOW STANDARD
Oregon rating system				
State and Federal accountability system				
Economically Disadvantaged-ELA	X			
Economically Disadvantaged-MATH		X		
ELL-ELA				
ELL-MATH				
Students with Disabilities-ELA	X			
Students with Disabilities-MATH	X			
Underserved-ELA	X			
Underserved-MATH			X	
All Student Growth-ELA				
All Student Growth-MATH				
Growth: Economically Disadvantaged-ELA				
Growth: Economically Disadvantaged-MATH				
Growth: ELL-ELA				
Growth: ELL-MATH				
Growth: Students with Disabilities-ELA				
Growth: Students with Disabilities-Math				
Growth: Underserved-ELA				
Growth: Underserved-MATH				
Alignment to CCSS	X			
Graduation/post-secondary readiness				
Graduation percent				
School completion/Diploma				
Drop out percentage				
Current Ratio: Assets/Liabilities		X		
Unrestricted Cash		X		
Enrollment Variance				
Loan Default		X		
Total Margin (income /revenue		X		
Debt to Asset Ratio		X		
Cash Flow		X		
Debt Service Coverage Ratio				
Reporting and Compliance		X		
GAAP		X		
Education Program Implementation		X		
Education Requirement Compliance		X		
Rights of Students with Disabilities		X		
Rights of ELL		X		
Governance Compliance		X		
Administration Accountability		X		
Reporting Requirement Compliance		X		
Rights of All Students		X		
Staff Credentialing Requirements		X		
Facilities and Transportation Requirements		X		
Health and Safety Requirements		X		
Student Information		X		
Other Obligations		X		

SUMMARY OF ANNUAL EVALUATION COMMENDATIONS AND RECOMMENDATIONS

Commendations:

1. Relied heavily on place-based curriculum during the pandemic, which was beneficial to the program and students
2. Very responsive to student and family needs during the pandemic
3. Partnered with Antioch and was able to offer a masters level class to their teachers
4. Introduction of indigenous curriculum impact school culture and representation positively
5. Current debt to asset ratio is well above target.
6. School has well over 60 days cash on hand.
7. Strong, supporting administrative team
8. Strong compliance with applicable requirements in law and contract.

Recommendations:

1. Consider posting policies online.
2. Continue working on staff recruitment and retention.
3. Continue working on student, family, and staff diversity



BEFORE THE OREGON STATE BOARD OF EDUCATION

PUBLIC HEARING: Renewal Request for Eagle Charter School

HEARING OFFICER'S REPORT

The Department held a public hearing on January 31, 2023 from 6:30 – 7:30PM, to receive public comment on the renewal request for The Cottonwood School of Civics and Science (Cottonwood). Notice of hearing was published in a timely manner and was sent to interested parties and persons who requested notice. The public hearing was necessary to comply with ORS 338.065(5)(c). The hearing was held online via Zoom before Kate Pattison, Hearing Officer. Emily Nazarov, Government and Legal Affairs Manager, and Corey Rosenberg, State Board of Education Administrator, also represented the Department at the hearing.

A sign-up form was shared with interested parties with notice of the hearing and allowed members of the community to provide written testimony or indicate interest in speaking at the hearing.

17 members of the Cottonwood community attended the public hearing.

12 people spoke at the public hearing. Everyone who spoke was in favor of the renewal of the charter school.

30 people submitted written testimony in through the sign-up form for the public hearing. No one provided written testimony that was opposed to the renewal.

14 people indicated support for the renewal through the sign-up form for the public hearing but did not submit further written testimony.

Participants expressed high levels of satisfaction with the school and reported it was the best fit for their child. Many reported enthusiasm for the diversity, equity and inclusion work the school has prioritized and incorporated into the curricular design of the school.

Respectfully submitted this 1st day of February 2023

Kate Pattison, Hearing Officer

Written Testimony Regarding The Cottonwood School Renewal

Name: Serena Goldstone

Relationship to the school: Student

Do you support the renewal? Yes

Testimony: I went to CSCS from first through 8th grade. I think that the experiences I gained from attending there made me who I am today and allowed me to develop an understanding of how I best learn and what works for me in a school. I was able to do projects that had real world applications, build relationships with my teachers, and learn about things that I was interested in. CSCS is an amazing and unique school and I hope that it can keep providing an engaging and alternative school experience.

Name: Laura Bracke

Relationship to the school: Parent of former student and staff

Do you support the renewal? Yes

Testimony:

The Cottonwood School is a special and unique school. My relationship to The Cottonwood School of Civics and Science, formerly Southwest Charter School began in 2009 when my daughter entered the 1st grade. A year ago, I began working in the school office.

As a college student my daughter continues to reap the benefits of attending Cottonwood. Some of her special mentions:

-the school fostered the kind of environment to be yourself through the teachers' actions and words

-being in Animal families gave one the feeling of belonging, being mentored by older students and mentoring the younger students (note: Animal families are a group of students in each grade. They stay in the same animal family all of their years in attendance)

- liked the feeling of being in a smaller school and smaller class size (versus her local public at the time had an enrollment of 800+ K-2 students)

-the emphasis on sustainable living is important, as an addition to what is practiced at home

The model of the school encourages and sustains a student's whole being. There is so much to love about Cottonwood. I whole heartedly encourage ODE to renew Cottonwood's charter, so that students can continue to have these wonderful opportunities.

Name: Mahriah Zimmerman

Relationship to the school: Parent, Family Member, Guardian

Do you support the renewal? Yes

Testimony: "Hi. My name is Mahriah Zimmerman and I am a parent of Lord Lawrence" attending kindergarten in Kimberlee's class room.

This is our first year at Cottonwood and we are very happy to have been chosen in the lottery. I could only wish all children had such an opportunity. As parent that suffers deeply from anxiety (school shootings, madness of world) Cottonwood has been both thoughtful and personal in understanding through exemplary communication and kindness. Which has allowed me manage my anxiety. My family and I are truly grateful.

Written Testimony Regarding The Cottonwood School Renewal

Some of our other favorite things about Cottonwood are spending time at Cottonwood Bay, The buddy system (having an older student to know..) care, concern and deliberate focus for families of color is appreciated. Truly the focus on ALL cultures is an incredible unique school quality, the importance of imagination, happiness of the teachers is awesome! They actually want to be there. The children are not sitting in a classroom all day. They are exploring.. and living and growing. Cottonwood has exceeded my expectations.

The only thing needed/missing is a school bus (transportation) a safe means of travel. Beyond that... Thank you for supporting independent state charter schools like Cottonwood for students and families like ours.”

Lord Lawrence

Mahriah Zimmerman

Name: Marisela Van Sickle

Relationship to the school: Parent, Family Member, Guardian

Do you support the renewal? Yes

Testimony: Cottonwood provides an incredible experience for our student of color, their commitment to DEI and continued efforts to put learning on the leading edge for our students.

Name: Julia Walls

Relationship to the school: Parent, Family Member, Guardian

Do you support the renewal? Yes

Testimony: Greetings,

My name is Dr. Julia Walls and I am a parent of 1st and 6th grade students. We have been part of the Cottonwood community for 7 years. My kids and I love this school because of the amazing and unique curriculum. As BIPOC students we appreciate the welcoming, safe environment the school has cultivated. We love the attention to growing social skills, the willingness to help neurodiverse students and creating learning opportunities in real-life. We chose this school for the place-based curriculum and have continued to love the special, engaging curriculum. My kids are thriving at this school and I strongly urge you to renew our charter. Thank you for supporting independent state charter schools like Cottonwood for students and families like ours.

Kind Regards,

Dr. Julia Walls

Name: Lisa Nguyen

Relationship to the school: Parent, Family Member, Guardian

Do you support the renewal? Yes

Testimony: Hello! My name is Lisa Nguyen and I am a parent of a 6th, 2nd and Kindergartner.

We have been part of Cottonwood for 5 years and chose Cottonwood because we love the smaller size classrooms, the fieldwork opportunities and the intentional subjects that they are learning. We love that they get to learn about subjects that would get overlooked in most schools and we love that equity and inclusion is such a huge part of the school's DNA. The teachers are amazing and really help the kids think bigger than themselves to be a part of a larger community.

Written Testimony Regarding The Cottonwood School Renewal

<p>Some of my / my student's favorite things about Cottonwood are art, adventure play, math and fieldwork.</p> <p>Thank you for supporting independent state charter schools like Cottonwood for students and families like ours.</p>
<p>Name: Cassidy Richey</p> <p>Relationship to the school: Parent, Family Member, Guardian</p> <p>Do you support the renewal? Yes</p> <p>Testimony: Hello. My name is Cassidy Richey. I have three kids who have attended or are attending The Cottonwood School. The Cottonwood School's place based model enables students and parents to connect learning back to the community and natural world around us. Getting up and out of the classroom and applying lessons in the field is so important and helps keep kids engaged and eager to learn. I have found that The Cottonwood School is more true to it's school mission than any other school we have looked into. I value place based learning for my kids and we wouldn't be able to find this at any other school. My eldest child has moved on to be a top student at high school and is a confident critical thinker due to his time at The Cottonwood School.</p>
<p>Name: Ashley shambaugh</p> <p>Relationship to the school: Parent, Family Member, Guardian</p> <p>Do you support the renewal? Yes</p> <p>Testimony: Hello. My name is Ashley Shambaugh and I am a mother to a seventh grade students. We have been part of Cottonwood since my son started kindergarten and chose Cottonwood because it's small and community focused and all about nature and science. I also love that my son is happy to go to school which is a win for a pre teen especially! Some of my student's favorite things about Cottonwood are the teachers and staff, their friends & classmates, the guest speakers at the school and the hands on learning they get. Thank you for supporting independent state charter schools like Cottonwood for students and families like ours.</p>
<p>Name: Cinzia Ballantyne</p> <p>Relationship to the school: Staff</p> <p>Do you support the renewal? Yes</p> <p>Testimony: Hi! I'm Cinzia Ballantyne, and I'm the 6/7/8 math teacher here at the Cottonwood School. Cottonwood (and other charter schools) are so special because of the relationships that can be formed with each student. I know each and every one of my students as individuals, and it allows me to create a space in my classroom where each student feels safe to learn - something that is so important as many students have negative feelings about math. I can also interweave my math teaching with the other teachers' curricula - a freedom that enhances student learning. My students are more fully engaged when they know their teachers well as people and can connect their learning across all subjects. The hands on learning that they get from guest speakers and field work fosters those neural connections even further. Every student deserves the personal experience of learning that Cottonwood provides students.</p>
<p>Name: Jacqueline Furuno</p>

Written Testimony Regarding The Cottonwood School Renewal

<p>Relationship to the school: Parent, Family Member, Guardian</p> <p>Do you support the renewal? Yes</p> <p>Testimony: Hi, my name is Jacqueline Furuno and our family has been a part of the cottonwood community since my daughter started (zoom!) kindergarten 2020. We are so grateful to have now both of our children enrolled here. With a now in person kindergartener and a 2nd grader, we're grateful that cottonwood gives children a safe place to learn in a thoughtful environment. In this community, they are able to connect with peers from all over the city who all come to the school with unique experiences. They're able to explore the city using public transit, see its inner workings and the people that make Portland their home. Cottonwood creates an opportunity for place based education for which I am grateful. Thank you for supporting independent state charter schools like Cottonwood for families and students like ours.</p>
<p>Name: Melanie Bissonnette</p> <p>Relationship to the school: Parent, Family Member, Guardian</p> <p>Do you support the renewal? Yes</p> <p>Testimony: I am a parent of a 6th grader at Cottonwood School. He has been going to Cottonwood since kindergarten and we have found it to be a wonderful, supportive community. We love the place-based education approach that the school uses. My son has a solid grounding in his neighborhood, his city, the land we live on. He's learned about Native Americans, their ways, native plants. The school has strong values and instills them in the kids. Cottonwood is a strong community that demonstrates cares for each other. My son's favorite things about Cottonwood are the teachers and the field work. Thank you for supporting independent state charter schools like Cottonwood. I am so grateful that my son has the opportunity to attend this school.</p>
<p>Name: Ali Moore</p> <p>Relationship to the school: Parent, Family Member, Guardian</p> <p>Do you support the renewal? Yes</p> <p>Testimony: I am a parent of two students at the Cottonwood School (in 3rd and 1st grade) and we have been with the school for four years. We chose Cottonwood because we believe in teaching our children about being active participants in their communities. We have found that the teachers and staff are deeply invested in an educational approach that fosters reciprocity, and encourages children to think empathetically beyond the classroom and into the context of both the natural world and the citywide and statewide public spheres. Renewing the charter for Cottonwood School of Civics and Science would allow this invaluable work to continue, helping our kids grow into engaged and respectful citizens of the world.</p>
<p>Name: Paola Witt</p> <p>Relationship to the school: Parent, Family Member, Guardian</p> <p>Do you support the renewal? Yes</p> <p>Testimony: I am a parent to 2nd grade twins and I'm also the educational aide in the Kindergarten classroom. We chose Cottonwood because of its commitment to place-based education. Our family values experiential learning and at the Cottonwood school our children have the unique opportunity to enhance their learning through fieldwork, which provides real world connections to the lessons</p>

Written Testimony Regarding The Cottonwood School Renewal

they are having in the classroom. Thank you for supporting independent state charter schools like Cottonwood.

Name: Kristin Krem

Relationship to the school: Staff

Do you support the renewal? Yes

Testimony: I am a staff member and parent at Cottonwood. I support the renewal because Place Based Education is the future of education! Connecting to place, to each other and to the earth is what we need for a strong and vibrant future. Cottonwood continues to learn and evolve as our school works to become more equitable and more diverse.

Name: McLean Cannon

Relationship to the school: Staff

Do you support the renewal? Yes

Testimony: I am a third-year teacher at The Cottonwood School and have found a home where I hope to teach for my career. From the supportive administrative team who listen and support their staff to the committed and selfless staff of educators who give so much to their work, to the loyal and supportive families who believe in our mission, to create curious, civically-engaged young people, to the awesome students who show up each, day I cannot imagine teaching anywhere else!

Name: Jeff Bissonnette

Relationship to the school: Parent, Family Member, Guardian

Do you support the renewal? Yes

Testimony: I am not available to attend the meeting tomorrow evening but would like to offer some written testimony. We have been at Cottonwood since my son was in kindergarten. He is now in the 6th grade. Cottonwood has been a great place for him to be. His curiosity is encouraged, he's learning and he's connecting what he is learning to the community around him. That is precisely what Cottonwood was founded to do and it's doing it well. The teachers and staff work hard. We saw this particularly during the pandemic. The school's response to an online learning environment was very good. They continued to teach and students continued to learn, even in an online environment, even though none of us signed up to be at an online school. But the school's spirit was able to carry through. It's very good to have Eli back in an in-person environment and we look forward to the school continuing to offer its unique mix of community, academics, and student growth. Thanks for the opportunity to offer these observations. I'd be happy to answer any questions.

Name: Chris Beckley

Relationship to the school: Parent, Family Member, Guardian

Do you support the renewal? Yes

Testimony: I have been part of the CSCS community for about 10 years with 2 kids. I believe that Cottonwood's approach of place-based education is revolutionary. My children have hands-on, interactive, meaningful experiences that are so valuable to their learning and growing. The staff is a wonderful group of expert educators who work together well and work very hard towards constant improvement, growth and equity for the students and the community.

Written Testimony Regarding The Cottonwood School Renewal

Name: Dan Bowman

Relationship to the school: Staff

Do you support the renewal? Yes

Testimony: I have been teaching full time at Cottonwood for the last 2 years and was a substitute teacher before that. In that time, I have seen many students come through who were falling through the cracks at their neighborhood school. Many of these students were looking for a place where they could belong and where they could learn to best of their ability. Every year, I hear from parents that they are so grateful for how much their students thrive in this community. Our small class size, community orientation, and our student centered philosophy help all of our students belong, grow, and thrive.

As a step-parent, I have seen first hand how my own student struggled with falling through the cracks in classes as large as 40 at his neighborhood school. In that school, his in depth study of the history of war was being criminalized, and he was failing in nearly every subject. When he started at Cottonwood, his teacher saw his interest in history as an asset and made him the class historian, helping the class to find the historical context to the topics they are studying and my step son find value in his natural interests. He has begun to thrive socially, and is making unprecedented academic progress.

Cottonwood's ability to seal up the cracks that let students fall through is invaluable to the future of our community. Thank you for supporting our work and our students.

Name: Sade Rivers

Relationship to the school: Parent and staff

Do you support the renewal? Yes

Testimony: I have three students who attend Cottonwood (K, 3rd, and 5th grader) all who been here since kindergarten. We have always felt included and part of this community. The class size and the fieldwork is what brought us to Cottonwood. We fell in love with their place based mission. I feel my kids see things in a different way because of that. They love how much outdoor time they have. Going to Cottonwood Bay is one of their favorite things. As a staff member this is my first year working at cottonwood and I am glad to be part of the team. I see how staff genuinely care for their students and for each other. Thank you for supporting independent state charter schools like Cottonwood for students, staff, and families like ours.

Name: Kimberley Bonder

Relationship to the school: Staff

Do you support the renewal? Yes

Testimony: I started teaching kindergarten at the Cottonwood School of Civics and Science four years ago. Prior to that I taught preschool through 3 grade at another school for eleven years. During my first two years at the school our world encountered a world pandemic, lockdown, hybrid learning and back to school pandemic protocols. This was a true testament to what a gift the Cottonwood School is to the community at large, the administration, the other teachers and all of my coworkers showed their love, dedication, academic knowledge about teaching and learning, child development and resilience in ways I did not know were possible. The commitment to place-based education, culturally

Written Testimony Regarding The Cottonwood School Renewal

responsive curriculum, problem solving and social emotional learning is needed more than ever in this world. We need students engaged in civic responsibility and examining the past through place and events to create a better world for us all. I feel so blessed to have been chosen to teach in a school where everyone is dedicated to this mission and understands the difference between being educated and a teaching and learning environment that nurtures the whole child to grow, thrive, learn and contribute to their local and larger community. We know now this is more important than ever. We need grace, we need patients, we need to hold one another up. The Cottonwood School does this so very well and is an asset to our community.

Name: Melissa Swinney

Relationship to the school: Parent, Family Member, Guardian

Do you support the renewal? Yes

Testimony: I'm the parent of a 2nd grade student. This is the 3rd year we've been part of Cottonwood and chose this school because of their place-based curriculum. Our family loves that our student gets to do hands on activities related to topics she's leaning in the classroom. Thank you for supporting independent state charter schools like Cottonwood for students and families like ours.

Name: Emily Sturgess Cleek

Relationship to the school: Parent, Family Member, Guardian

Do you support the renewal? Yes

Testimony: I'm willing to speak at the hearing, but as a parent and board member, ODE has already heard from me, and I'd prefer to give others a chance to share. Below are some of my thoughts on the value of Cottonwood School.— Cottonwood has been an incredible school for my two daughters. Each of my daughters attended another school for elementary school and then transferred to Cottonwood for Middle School where they were welcomed into a curious and engaged learning community. The place- based and project learning at Cottonwood have allowed my daughters to dive deep into various academic topics and to follow their own curiosity to explore different facets of these complex subjects. The students also have ample opportunities to focus on community building, leadership, and social-emotional learning, ask which have been incredibly important during their middle school years. I have worked with educators my entire life, from my years as a student, to working in an educational setting, and to working with my daughters' teachers from kindergarten on up. Some of the most engaged, dedicated, fun, and insightful teachers we've known have been those at Cottonwood. It is an important learning environment that really gives students a place to thrive.

Name: Heather Watkins

Relationship to the school: Parent, Family Member, Guardian

Do you support the renewal? Yes

Testimony: My name is Heather Watkins and I am a parent of a 6th grade student. Our child started at Cottonwood in first grade, and we have been part of Cottonwood for six years. We love being part of this school community and wholeheartedly support the renewal of the charter. We moved our child to Cottonwood for first grade. The school's vision, looking "beyond classroom walls" appealed to us. We were looking for a school with an expansive idea of education, a curriculum that would help our child develop and support intellectual curiosity, emotional well-being, and a deep

Written Testimony Regarding The Cottonwood School Renewal

understanding of the communities they already are part of, as well as those they will come to know as they move through life. Cottonwood has proven to be all that and more. Everywhere at CSCS, in and outside the classrooms, there is real learning happening. Kids learn how to think critically, ask good questions, make connections across fields of study and methodologies. They learn to care for one another and the environment. They learn through hands-on, experiential work and play that is relevant to the lived experience of our kids and the communities they come from and move within. Our 6th grade student says of Cottonwood, ^[11]_[SEP]“The staff is amazing. And the teachers don’t just tell us how to do something—they show us how to learn. They let us discover more on our own.” Thank you for supporting independent state charter schools like Cottonwood for students and families like ours.

Name: Sara Miller

Relationship to the school: Staff

Do you support the renewal? Yes

Testimony: My name is Sara and I am a 1st and 2nd grade teacher at the Cottonwood School. This is my 2nd year teaching at the school. I take pride in the community that our school has created, our commitment to civic engagement, Indigenous studies and teaching to the whole child. I am continuously grateful for the community of students, families, and faculty that we have fostered and the desire to continue pushing forward as a community to improve our practices, partnerships, and academic rigor. It is important to continue to support schools like ours that provide a safe, engaging and nurturing environment for kids to learn in.

Name: Justin Iverson

Relationship to the school: Parent, Family Member, Guardian

Do you support the renewal? Yes

Testimony: Our family is listening to the public hearing and my first grade son offered unprompted, “Cottonwood is a great school. I want to go to eighth grade here.” For my part, I appreciate the curriculum and the mixed age classes, which allow the students to both learn from and mentor their peers, while developing strong relationships with their teachers over two year periods. I strongly support renewal of the cottonwood charter contract for another five years. Thank you.

Name: Caroline Falcone Goldstone

Relationship to the school: Former Parent

Do you support the renewal? Yes

Testimony: This is my first year in 13 years that I have not had a child at CSCS and we miss the community, the teachers, and the leadership. My kids are both thriving in highschool and I believe this is because of how they were treated and taught at CSCS. They learned about leadership and civics, they learned how to take the perspectives of many other people in their classrooms and their lives, they learned to love to learn and be curious, they learned how to talk with adults, they learned that adults will respect them, listen to them, support them and walk alongside them as they grow. They learned to revere education and teachers as an important pathway to knowledge, connection, community and self empowerment. I wholeheartedly support CSCS and think it is a model for education in this city and this nation.

Written Testimony Regarding The Cottonwood School Renewal

<p>Name: Elizabeth Maxon Relationship to the school: Staff Do you support the renewal? Yes Testimony: This is my first year teaching at Cottonwood and it already feels like a second home to me. The emphasis on community values has fostered a tightly knit group of students and teachers who truly care for each other, and I can't imagine teaching anywhere else. Students come to school excited everyday and are agents of their own learning in a way that inspires me all the time. I absolutely support Cottonwood's charter renewal!</p>
<p>Name: Katt Beckley Relationship to the school: Both staff and a parent Do you support the renewal? Yes Testimony: This school has been a huge part of our life for many years. I have one who is now in 10th grade, my youngest is still in 4th grade. I have been both a volunteer and now work as the reading specialist for K-3. There are so many wonderful things that the school does, place-based learning has been invaluable to me and my kids. The staff is amazing as well, after being an educator for over 20 years, I always look at the staff of a school, the way they interact with kids and each other. These teachers really care about the whole child, and come to school with open hearts and open minds every day. I thoroughly enjoy working there, it is amazing to see them all work as a team, encouraging and supporting each other throughout the year.</p>
<p>Name: Sybil Buell Relationship to the school: Parent, Family Member, Guardian Do you support the renewal? Yes Testimony: Two of my grandchildren attended Cottonwood, one for seven years and one for eight. They are currently in their freshman and senior years in high school where they entered well-prepared for advance level courses. Through the creative, nurturing environment at Cottonwood they gained confidence in their ability to make friends, read new books, express themselves and became strong independent students. Most importantly they realized the joy of learning. The dedication of teachers and administration to the philosophy of "place based education" make Cottonwood a model for what I feel a K-8 school should be. I hope they continue to support students for many years to come.</p>
<p>Name: Laura Stanfill Relationship to the school: Parent, Family Member, Guardian Do you support the renewal? Yes Testimony: We've been a Cottonwood family for six years and counting. I believe so much in this school and its focus on place-based education. My oldest graduated two years ago and brought all the skills and insights--about the world, about their own identity--to high school. My younger child comes home muddy and exhilarated every day, always talking about the latest trip to Cottonwood Bay.</p>



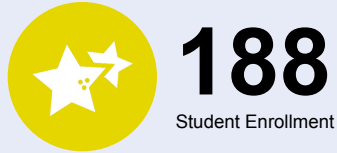
OREGON AT-A-GLANCE SCHOOL PROFILE

The Cottonwood School of Civics and Science



PRINCIPAL: Amanda McAdoo | GRADES: K-8 | 640 S Bancroft St, Portland 97239 | 503-244-1697

Students We Serve



DEMOGRAPHICS

American Indian/Alaska Native	
Students	0%
Teachers	0%
Asian	
Students	5%
Teachers	7%
Black/African American	
Students	4%
Teachers	0%
Hispanic/Latino	
Students	11%
Teachers	7%
Multiracial	
Students	10%
Teachers	13%
Native Hawaiian/Pacific Islander	
Students	0%
Teachers	0%
White	
Students	70%
Teachers	73%

* 5 Languages Spoken

Ever English Learners

22% Students with Disabilities

72% Required Childhood Vaccinations

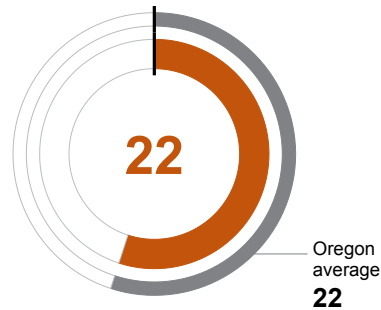
>95% Free/Reduced Price Lunch

*<10 students or data unavailable

School Environment

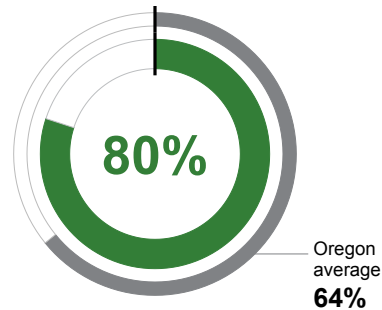
CLASS SIZE

Median class size.



REGULAR ATTENDERS

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



Academic Progress

INDIVIDUAL STUDENT PROGRESS

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

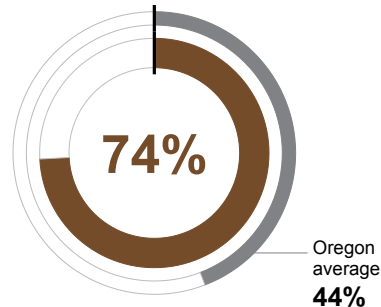
Data not available in 2021-22

218

Academic Success

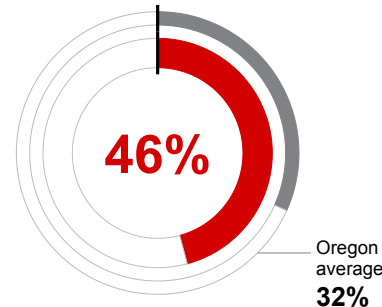
ENGLISH LANGUAGE ARTS

Students meeting state grade-level expectations.



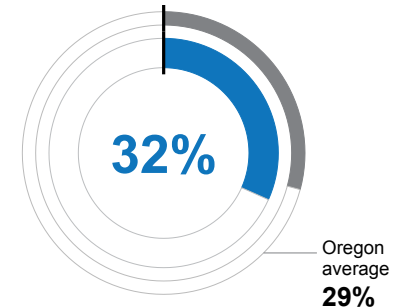
MATHEMATICS

Students meeting state grade-level expectations.



SCIENCE

Students meeting state grade-level expectations.



School Goals

Our goal as a school is that each student thrive academically while feeling supported, included and safe. In support of this, we began a whole school initiative to improve our teaching of social-emotional learning, using Responsive Classroom tools. Teachers focus on building community in their classrooms and carefully examine the language they use with students. Staff focus on integrating more literacy throughout the day as well as improving our assessment skills. We also work closely with equity consultants, our DEI committee and staff to improve our cultural responsiveness.

State Goals

The Oregon Department of Education is partnering with school districts and local communities to ensure a 90% on-time, four year graduation rate by 2025. To progress toward this goal, the state will prioritize efforts to improve attendance, provide a well-rounded education, invest in implementing culturally responsive practices, and promote continuous improvement to close opportunity and achievement gaps for historically and currently underserved students.

Safe & Welcoming Environment

Our school is committed to building strong, healthy relationships between all members of our community. When students are surrounded by the culture of a community, they feel a sense of belonging. Our school regularly practices community building through morning meetings, all-school gatherings, cross-grade partnerships, problem-solving meetings using the Positive Discipline model, and events such as the all-school lunch, the talent show, and more. We actively teach character traits and integrate them into academic studies. By prioritizing community- and relationship-building, we foster a safe environment in which students can thrive.



OREGON AT-A-GLANCE SCHOOL PROFILE CONTINUED

The Cottonwood School of Civics and Science



2021-22

Outcomes

Our Staff (rounded FTE)



10

Teachers



5

Educational assistants



<1

Counselors/
Psychologists



86%

Average teacher retention rate



60%

% of licensed teachers with more than 3 years of experience



Yes

Same principal in the last 3 years

REGULAR ATTENDERS

American Indian/Alaska Native	<10 students or data unavailable
Asian	<10 students or data unavailable
Black/African American	<10 students or data unavailable
Hispanic/Latino	75%
Multiracial	84%
Native Hawaiian/Pacific Islander	<10 students or data unavailable
White	83%
Free/Reduced Price Lunch	80%
Ever English Learner	<10 students or data unavailable
Students with Disabilities	76%
Migrant	<10 students or data unavailable
Homeless	<10 students or data unavailable
Students in Foster Care	<10 students or data unavailable
Talented and Gifted	<10 students or data unavailable
Female	81%
Male	79%
Non-Binary	<10 students or data unavailable

ENGLISH LANGUAGE ARTS

<10 students or data unavailable
<10 students or data unavailable
<10 students or data unavailable
70%
43%
<10 students or data unavailable
81%
74%
<10 students or data unavailable
<10 students or data unavailable
<10 students or data unavailable
<10 students or data unavailable
<10 students or data unavailable
<10 students or data unavailable
<10 students or data unavailable
77%
73%
<10 students or data unavailable

MATHEMATICS

<10 students or data unavailable
<10 students or data unavailable
<10 students or data unavailable
20%
21%
<10 students or data unavailable
56%
46%
<10 students or data unavailable
51%
<10 students or data unavailable
<10 students or data unavailable
<10 students or data unavailable
<10 students or data unavailable
42%
49%
<10 students or data unavailable

219

About Our School

BULLYING, HARASSMENT, AND SAFETY POLICIES

The Cottonwood School uses proactive and inclusive practices so that all students feel safe. We provide students the opportunity to reflect on the impact of their actions, repair the harm done, and develop skills to make better choices.

All teachers build an intentional learning community by:

- Creating classroom agreements with input from students that are posted and referred to regularly.
- Creating a place-based curriculum relevant to student's lives and community.
- Collectively identifying and applying our school Character Traits within the school community.
- Utilizing the Positive Discipline Approach, including class meetings & appreciation circles.

EXTRACURRICULAR ACTIVITIES

Please check out our website for current offerings.

PARENT ENGAGEMENT

As a small school, parental involvement is the key to our success. We believe that every family has a way to contribute to our community. Community involvement and civic responsibility are something we actively teach and children feel a stronger connection to their school and community when they know that their parents are involved. We expect all families to contribute 24 hours of service to our school each year. The hours can be met chaperoning on day and overnight fieldwork, supporting small group work in the classroom, serving on our PTO or school board, helping to maintain our new vibrant school yard, painting, cleaning, office support, fundraising and organizing fun collaborative community events!

COMMUNITY ENGAGEMENT

Community Engagement is central to our mission as a place-based school. CSCS leads more than 100 fieldwork trips a year for students to get out and learn in the world. We partner with dozens of community organizations and governmental agencies to create meaningful experiences for students with the aim of designing projects that mutually benefit the school and the community. Examples of partners include the Mirabella retirement home, Portland Parks and Recreation, Tryon Creek State Park, and Portland State University. Through continual engagement with neighbors, guest speakers, partners, and families, CSCS connects students to the places where we live.

2021-22 ESSA Accountability Details Report

Public Version - October 20, 2022

District: Oregon Department of Education

School: The Cottonwood School of Civics and Science

The Accountability Details Report displays the data for indicators used by the accountability system to identify schools for comprehensive or targeted supports as required by Oregon's State Plan under the Every Student Succeeds Act (ESSA). The accountability system uses six indicators for elementary and middle schools. For more information about the included indicators and their definitions and calculations, please refer to the [Accountability Details Policy and Technical Manual](#). For more information on the transition of school identification from year-to-year please see the [School Improvement webpage](#).

Indicator Ratings Table

Student Group	ESSA Supports	ELA Achievement	ELA Change	Math Achievement	Math Change	Regular Attenders	On Track to ELP
All Students	Not Identified	Level 3	Level 5	Level 2	Level 4	Level 2	Not Rated
Economically Disadvantaged	Not Identified	Level 4	Level 5	Level 3	Level 4	Level 2	
English Learners	Not Identified	Not Rated	Not Rated	Not Rated	Not Rated	Not Rated	Not Rated
Students with Disabilities	Not Identified	Level 3	Level 5	Level 2	Level 5	Level 2	
Underserved Race/Ethnicity	Not Applicable	Not Applicable	Not Applicable	Not Applicable	Not Applicable	Not Applicable	
American Indian/ Alaska Native	Not Identified	Not Rated	Not Rated	Not Rated	Not Rated	Not Rated	
Native Hawaiian/ Pacific Islander	Not Identified	Not Rated	Not Rated	Not Rated	Not Rated	Not Rated	
Black/African American	Not Identified	Not Rated	Not Rated	Not Rated	Not Rated	Not Rated	
Hispanic/Latino	Not Identified	Not Rated	Not Rated	Not Rated	Not Rated	Level 2	
Asian	Not Identified	Not Rated	Not Rated	Not Rated	Not Rated	Not Rated	
White	Not Identified	Level 4	Level 5	Level 3	Level 5	Level 3	
Multi-racial	Not Identified	Level 2	Not Rated	Level 2	Not Rated	Level 5	

Suggested Level of Support for 2021-2022: **Exited** 2018-2019: **Targeted** 2017-2018: **Not Identified**

Met ELA and Math Participation target (95%) for all student groups: **Yes** (details on pages 4 and 7)

Received Title I Funds in 2018-19: **No**

Please note the following:

- Indicator ratings that display 'Not Rated' refer to student groups that do not meet the minimum n-size to receive a rating.
- The expansion of the federal free/reduced price meal program increased the number students included in the Economically Disadvantaged student group in 2021-22.
- The English learner student group has different inclusion rules for particular indicators.
- The Underserved Race/Ethnicity student group consists of the following racial/ethnic groups: American Indian/Alaska Native, Black/African American, Hispanic/Latino, and Native Hawaiian/Pacific Islander.
- The Underserved Race/Ethnicity group is eligible to be identified for targeted improvement only when none of the four student groups that comprise it have sufficient data to be considered for identification.

English Language Arts Academic Achievement Details

District: Oregon Department of Education

School: The Cottonwood School of Civics and Science

English Language Arts Achievement Level	Cut
Level 5	80
Level 4	67
Level 3	54
Level 2	25
Level 1	<25

The English Language Arts (ELA) Achievement indicator displays the percentage of students meeting the ELA achievement standard, the adjusted denominator, and the corresponding rating for each student group. The data table shows two years of data, a two-year average, and the applied rate (i.e., the two-year average after meeting the minimum n-size of 20). '*' means data was hidden to protect student confidentiality and 'Not Rated' refers to student groups that do not meet the minimum n-size to receive a rating. Note that the expansion of the federal free/reduced price meal program increased the number students included in the Economically Disadvantaged student group in 2021-22.

State Long Term Goal: 80%

Student Group		2018-19	2021-22	2-year Average	Rated on	Level
All Students - Percent		60.3	74.0	66.8	Average Rate	Level 3
All Students - Adjusted Denominator		136	123	259		
Economically Disadvantaged - Percent		58.1	74.0	70.8	Average Rate	Level 4
Economically Disadvantaged - Adjusted Denominator		31	123	154		
English Learners - Percent		*	*	*	Not Rated	Not Rated
English Learners - Adjusted Denominator		*	*	*		
Students with Disabilities - Percent		51.6	60.0	56.1	Average Rate	Level 3
Students with Disabilities - Adjusted Denominator		31	35	66		
American Indian/Alaska Native - Percent		*	*	*	Not Rated	Not Rated
American Indian/Alaska Native - Adjusted Denominator		*	*	*		
Black/African American - Percent		*	*	*	Not Rated	Not Rated
Black/African American - Adjusted Denominator		*	*	*		
Hispanic/Latino - Percent		*	70.0	68.4	Not Rated	Not Rated
Hispanic/Latino - Adjusted Denominator		*	10	*		
Native Hawaiian/Pacific Islander - Percent		*	*	*	Not Rated	Not Rated
Native Hawaiian/Pacific Islander - Adjusted Denominator		*	*	*		
Underserved Race/Ethnicity - Percent		63.6	62.5	63.0	Average Rate	Not Applicable
Underserved Race/Ethnicity - Adjusted Denominator		11	16	27		
Asian - Percent		*	*	*	Not Rated	Not Rated
Asian - Adjusted Denominator		*	*	*		
White - Percent		66.1	80.9	72.7	Average Rate	Level 4
White - Adjusted Denominator		109	89	198		
Multi-racial - Percent		25.0	42.9	34.6	Average Rate	Level 2
Multi-racial - Adjusted Denominator		12	14	26		

Note: An * next to Level 2 indicates that, although the student group did not meet the Level 2 cut for this indicator, this student group is not in the lowest ten percent of schools in Oregon.

English Language Arts Average Gap Score Change Details

District: Oregon Department of Education

School: The Cottonwood School of Civics and Science

The English Language Arts (ELA) Average Score Change indicator uses the difference between a student's score and the cut score for the assessment, called a gap score. The table displays the average gap score by school year, the change in the average gap score, the count of students tested, and the corresponding rating for each student group. '*' means data was hidden to protect student confidentiality and 'Not Rated' refers to student groups that do not meet the minimum n-size to receive a rating. Note that the expansion of the federal free/reduced price meal program increased the number students included in the Economically Disadvantaged student group in 2021-22.

ELA Average Gap Score Change	Cut
Level 5	5
Level 4	-7
Level 3	-19
Level 2	-42
Level 1	<-42

Student Group	2018-19	2021-22	Change in Average	Level
All Students	31	45	14	Level 5
All Students - Denominator	135	122		
Economically Disadvantaged	23	45	22	Level 5
Economically Disadvantaged - Denominator	31	122		
English Learners	*	*	*	Not Rated
English Learners - Denominator	*	*		
Students with Disabilities	5	25	20	Level 5
Students with Disabilities - Denominator	31	34		
American Indian/Alaska Native	*	*	*	Not Rated
American Indian/Alaska Native - Denominator	*	*		
Black/African American	*	*	*	Not Rated
Black/African American - Denominator	*	*		
Hispanic/Latino	*	48	*	Not Rated
Hispanic/Latino - Denominator	*	10		
Native Hawaiian/Pacific Islander	*	*	*	Not Rated
Native Hawaiian/Pacific Islander - Denominator	*	*		
Underserved Race/Ethnicity	42	25	-17	Not Applicable
Underserved Race/Ethnicity - Denominator	11	16		
Asian	*	*	*	Not Rated
Asian - Denominator	*	*		
White	39	56	17	Level 5
White - Denominator	108	88		
Multi-racial	-23	-5	18	Not Rated
Multi-racial - Denominator	12	14		

English Language Arts Participation Details

District: Oregon Department of Education

School: The Cottonwood School of Civics and Science

All students in tested grades and enrolled on the first school day in May must take a statewide assessment. The data table displays the percentage of students who took a statewide assessment by school year and student group. The applied rate for the participation status is the two-year average after meeting the minimum n-size of 20. 'Not Rated' means the student group did not meet minimum size requirements in order to receive a rating. Note that the expansion of the federal free/reduced price meal program increased the number students included in the Economically Disadvantaged student group in 2021-22.

Participation Target: 94.5%

Student Group		2018-19	2021-22	2-year Average	Status based on	Status
All Students - Percent		99.3	100.0	99.6	Average Rate	Met
All Students - Denominator		139	123	262		
Economically Disadvantaged - Percent		100.0	100.0	100.0	Average Rate	Met
Economically Disadvantaged - Denominator		31	123	154		
English Learners - Percent		--	--	--	Not Rated	Not Rated
English Learners - Denominator		0	0	0		
Students with Disabilities - Percent		96.9	100.0	98.5	Average Rate	Met
Students with Disabilities - Denominator		32	35	67		
American Indian/Alaska Native - Percent		--	--	--	Not Rated	Not Rated
American Indian/Alaska Native - Denominator		0	0	0		
Black/African American - Percent		100.0	100.0	100.0	Not Rated	Not Rated
Black/African American - Denominator		2	6	8		
Hispanic/Latino - Percent		100.0	100.0	100.0	Not Rated	Not Rated
Hispanic/Latino - Denominator		9	10	19		
Native Hawaiian/Pacific Islander - Percent		--	--	--	Not Rated	Not Rated
Native Hawaiian/Pacific Islander - Denominator		0	0	0		
Underserved Race/Ethnicity - Percent		100.0	100.0	100.0	Average Rate	Met
Underserved Race/Ethnicity - Denominator		11	16	27		
Asian - Percent		100.0	100.0	100.0	Not Rated	Not Rated
Asian - Denominator		4	4	8		
White - Percent		99.1	100.0	99.5	Average Rate	Met
White - Denominator		112	89	201		
Multi-racial - Percent		100.0	100.0	100.0	Average Rate	Met
Multi-racial - Denominator		12	14	26		

Mathematics Academic Achievement Details

District: Oregon Department of Education

School: The Cottonwood School of Civics and Science

The Mathematics Achievement indicator displays the percentage of students meeting the Mathematics achievement standard, the adjusted denominator, and the corresponding rating for each student group. The data table shows two years of data, a two-year average, and the applied rate (i.e., the two-year average after meeting the minimum n-size of 20). ‘*’ means data was hidden to protect student confidentiality and ‘Not Rated’ refers to student groups that do not meet the minimum n-size to receive a rating. Note that the expansion of the federal free/reduced price meal program increased the number students included in the Economically Disadvantaged student group in 2021-22.

Mathematics Achievement Level	Cut
Level 5	80
Level 4	62
Level 3	43
Level 2	13
Level 1	<13

State Long Term Goal: 80%

Student Group		2018-19	2021-22	2-year Average	Rated on	Level
All Students - Percent		39.6	46.0	42.6	Average Rate	Level 2
All Students - Adjusted Denominator		134	124	258		
Economically Disadvantaged - Percent		41.9	46.0	45.2	Average Rate	Level 3
Economically Disadvantaged - Adjusted Denominator		31	124	155		
English Learners - Percent		*	*	*	Not Rated	Not Rated
English Learners - Adjusted Denominator		*	*	*		
Students with Disabilities - Percent		16.1	51.4	35.4	Average Rate	Level 2
Students with Disabilities - Adjusted Denominator		31	35	65		
American Indian/Alaska Native - Percent		*	*	*	Not Rated	Not Rated
American Indian/Alaska Native - Adjusted Denominator		*	*	*		
Black/African American - Percent		*	*	*	Not Rated	Not Rated
Black/African American - Adjusted Denominator		*	*	*		
Hispanic/Latino - Percent		*	20.0	31.6	Not Rated	Not Rated
Hispanic/Latino - Adjusted Denominator		*	10	*		
Native Hawaiian/Pacific Islander - Percent		*	*	*	Not Rated	Not Rated
Native Hawaiian/Pacific Islander - Adjusted Denominator		*	*	*		
Underserved Race/Ethnicity - Percent		36.4	12.5	22.2	Average Rate	Not Applicable
Underserved Race/Ethnicity - Adjusted Denominator		11	16	27		
Asian - Percent		*	*	*	Not Rated	Not Rated
Asian - Adjusted Denominator		*	*	*		
White - Percent		43.0	55.6	48.7	Average Rate	Level 3
White - Adjusted Denominator		107	90	197		
Multi-racial - Percent		16.7	21.4	19.2	Average Rate	Level 2
Multi-racial - Adjusted Denominator		12	14	26		

Note: An * next to Level 2 indicates that, although the student group did not meet the Level 2 cut for this indicator, this student group is not in the lowest ten percent of schools in Oregon.

Mathematics Average Gap Score Change Details

District: Oregon Department of Education

School: The Cottonwood School of Civics and Science

The Mathematics Average Score Change indicator uses the difference between a student's score and the cut score for the assessment, called a gap score. The table displays the average gap score by school year, the change in the average gap score, the count of students tested, and the corresponding rating for each student group. '*' means data was hidden to protect student confidentiality and 'Not Rated' refers to student groups that do not meet the minimum n-size to receive a rating. Note that the expansion of the federal free/reduced price meal program increased the number students included in the Economically Disadvantaged student group 2021-22.

Math Average Gap Score Change	Cut
Level 5	4
Level 4	-11
Level 3	-24
Level 2	-49
Level 1	<-49

Student Group		2018-19	2021-22	Change in Average		Level
All Students		-15	-17	-2		Level 4
	All Students - Denominator	134	123			
Economically Disadvantaged		-17	-17	0		Level 4
	Economically Disadvantaged - Denominator	31	123			
English Learners		*	*	*		Not Rated
	English Learners - Denominator	*	*			
Students with Disabilities		-40	-16	24		Level 5
	Students with Disabilities - Denominator	30	34			
American Indian/Alaska Native		*	*	*		Not Rated
	American Indian/Alaska Native - Denominator	*	*			
Black/African American		*	*	*		Not Rated
	Black/African American - Denominator	*	*			
Hispanic/Latino		*	-39	*		Not Rated
	Hispanic/Latino - Denominator	*	10			
Native Hawaiian/Pacific Islander		*	*	*		Not Rated
	Native Hawaiian/Pacific Islander - Denominator	*	*			
Underserved Race/Ethnicity		4	-73	-77		Not Applicable
	Underserved Race/Ethnicity - Denominator	11	16			
Asian		*	*	*		Not Rated
	Asian - Denominator	*	*			
White		-9	6	15		Level 5
	White - Denominator	107	89			
Multi-racial		-81	-97	-16		Not Rated
	Multi-racial - Denominator	12	14			

Mathematics Participation Details

District: Oregon Department of Education

School: The Cottonwood School of Civics and Science

All students in tested grades and enrolled on the first school day in May must take a statewide assessment. The data table displays the percentage of students who took a statewide assessment by school year and student group. The applied rate for the participation the two-year average after meeting the minimum n-size of 20. 'Not Rated' means the student group did not meet minimum size requirements in order to receive a rating. Note that the expansion of the federal free/reduced price meal program increased the number students included in the Economically Disadvantaged student group in 2021-22.

Participation Target: 94.5%

Student Group		2018-19	2021-22	2-year Average	Status based on	Status
All Students - Percent		97.8	100.0	98.9	Average Rate	Met
All Students - Denominator		139	124	263		
Economically Disadvantaged - Percent		100.0	100.0	100.0	Average Rate	Met
Economically Disadvantaged - Denominator		31	124	155		
English Learners - Percent		--	--	--	Not Rated	Not Rated
English Learners - Denominator		0	0	0		
Students with Disabilities - Percent		93.8	100.0	97.0	Average Rate	Met
Students with Disabilities - Denominator		32	35	67		
American Indian/Alaska Native - Percent		--	--	--	Not Rated	Not Rated
American Indian/Alaska Native - Denominator		0	0	0		
Black/African American - Percent		100.0	100.0	100.0	Not Rated	Not Rated
Black/African American - Denominator		2	6	8		
Hispanic/Latino - Percent		100.0	100.0	100.0	Not Rated	Not Rated
Hispanic/Latino - Denominator		9	10	19		
Native Hawaiian/Pacific Islander - Percent		--	--	--	Not Rated	Not Rated
Native Hawaiian/Pacific Islander - Denominator		0	0	0		
Underserved Race/Ethnicity - Percent		100.0	100.0	100.0	Average Rate	Met
Underserved Race/Ethnicity - Denominator		11	16	27		
Asian - Percent		100.0	100.0	100.0	Not Rated	Not Rated
Asian - Denominator		4	4	8		
White - Percent		97.3	100.0	98.5	Average Rate	Met
White - Denominator		112	90	202		
Multi-racial - Percent		100.0	100.0	100.0	Average Rate	Met
Multi-racial - Denominator		12	14	26		

Regular Attenders Details

District: Oregon Department of Education

School: The Cottonwood School of Civics and Science

The Regular Attenders indicator displays the percentage of students attending for more than 90 percent of their enrolled school days, the denominator, and the corresponding rating for each student group. The data table shows two years of data, a two-year average, and the applied rate (i.e., the two-year average after meeting the minimum n-size of 20). ‘*’ means data was hidden to protect student confidentiality and ‘Not Rated’ refers to student groups that do not meet the minimum n-size to receive a rating. Note that the expansion of the federal free/reduced price meal program increased the number students included in the Economically Disadvantaged student group in 2021-22.

Regular Attenders Level	Cut
Level 5	93
Level 4	89
Level 3	85
Level 2	65
Level 1	<65

State Long Term Goal: 93%

Student Group	Grade Range		2018-19	2021-22	2-year Average	Rated on	Level
All Students - Percent	K-5		92.4	77.2	84.9	Average Rate	Level 2
All Students - Denominator			132	127	259		
Economically Disadvantaged - Percent	K-5		93.8	77.2	80.5	Average Rate	Level 2
Economically Disadvantaged - Denominator			32	127	159		
English Learners - Percent	K-5		*	*	*	Not Rated	Not Rated
English Learners - Denominator			*	*	*		
Students with Disabilities - Percent	K-5		88.0	71.4	79.2	Average Rate	Level 2
Students with Disabilities - Denominator			25	28	53		
American Indian/Alaska Native - Percent	K-5		*	*	*	Not Rated	Not Rated
American Indian/Alaska Native - Denominator			*	*	*		
Black/African American - Percent	K-5		*	*	*	Not Rated	Not Rated
Black/African American - Denominator			*	*	*		
Hispanic/Latino - Percent	K-5		90.9	70.6	78.6	Average Rate	Level 2
Hispanic/Latino - Denominator			11	17	28		
Native Hawaiian/Pacific Islander - Percent	K-5		*	*	*	Not Rated	Not Rated
Native Hawaiian/Pacific Islander - Denominator			*	*	*		
Underserved Race/Ethnicity - Percent	K-5		92.9	60.9	73.0	Average Rate	Not Applicable
Underserved Race/Ethnicity - Denominator			14	23	37		
Asian - Percent	K-5		*	*	84.6	Not Rated	Not Rated
Asian - Denominator			*	*	*		
White - Percent	K-5		90.9	80.2	85.9	Average Rate	Level 3
White - Denominator			99	86	185		
Multi-racial - Percent	K-5		>95	90.0	>95	Average Rate	Level 5
Multi-racial - Denominator			*	10	*		

Note: An * next to Level 2 indicates that, although the student group did not meet the Level 2 cut for this indicator, this student group is not in the lowest ten percent of schools in Oregon.

On Track to English Language Proficiency (ELP) Details

District: Oregon Department of Education

School: The Cottonwood School of Civics and Science

The On Track to English Language Proficiency (ELP) indicator displays the percentage of students who are on track to attain ELP, the denominator, and the corresponding rating for each student group. The data table shows two years of data, a two-year average, and the applied rate (i.e., the two-year average after meeting the minimum n-size of 20). '*' means data was hidden to protect student confidentiality and 'Not Rated' refers to student groups that do not meet the minimum n-size to receive a rating. Note that the expansion of the federal free/reduced price meal program increased the number students included in the Economically Disadvantaged student group in 2021-22.

On Track to ELP Level	Cut
Level 5	80
Level 4	68
Level 3	56
Level 2	26
Level 1	<26

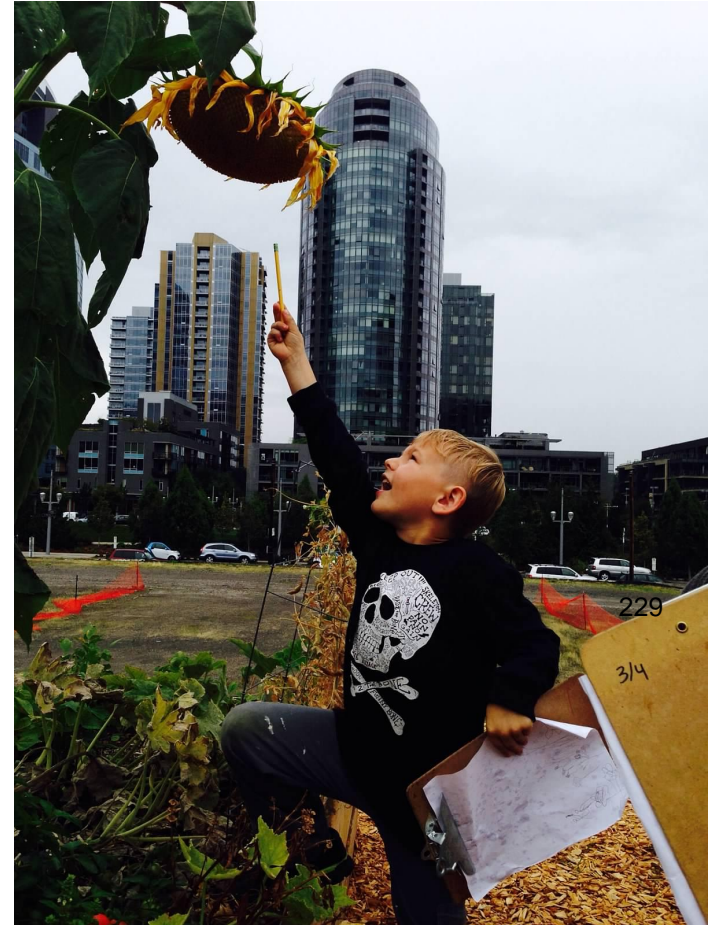
State Long Term Goal: 80%

Student Group		2018-19	2021-22	2-year Average	Rated on	Level
Current English Learners - Percent		*	*	*	Not Rated	Not Rated
Current English Learners - Denominator		*	*	*		



South Portland, Oregon

Amanda McAdoo, Executive Director
and
Susan Hathaway, Academic Director



Our Mission & Vision

Our mission- provide a creative learning environment where students develop a sense of place and become stewards of the natural world and active citizens within our community.

Our vision- Look beyond classroom walls. We believe that healthy communities are created by engaged, informed, and compassionate citizens. Through service, integrated curriculum and experiential learning, we provide opportunities for our students to actively build relationships locally, inspiring them to become catalysts of change in a global community.

We do this through the Place-based Education Model.



Place-Based Education

- Prioritizes community on all levels: within the classroom, within the school, between the school and the wider communities (human and natural)
- Social and emotional education are embedded into place-based projects. Practice can naturally reinforce: empathy, responsibility, patience, flexibility, perseverance, collaborative skills, integrity and courage
- PBE projects engages students in real work in their communities, stifling the question: “Why do we need to learn this?”

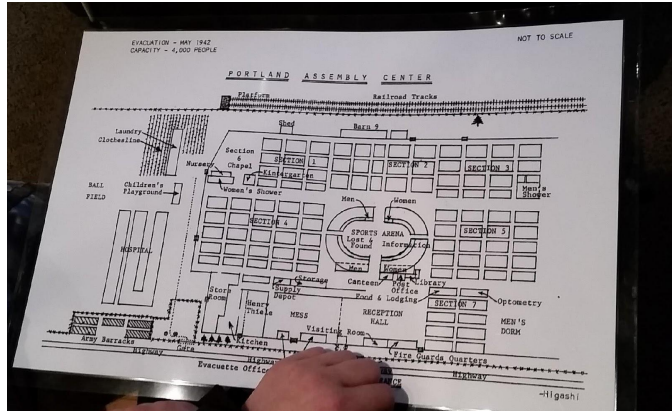


1st/2nd Grade: Neighborhood Study



Portland Assembly Center: WW II and Japanese Internment in Portland

7/8th grade





Oaks Bottom Wildlife Monitoring Project



Diversity, Equity, Inclusion and Belonging

Highlights from 2018 to now:

- Monthly or more professional development for staff
- DEI Committee Formed in early 2020
- Developed CSCS Equity Lens
- Launched the Cottonwood Black Excellence Community Award
- Hired Sade Rivers as our Diversity, Equity, Inclusion & Belonging Coordinator
- Highlighted Heritage Months
- Started monthly all school BIPOC Affinity Groups
- Hosted family BIPOC gatherings at school
- Implemented a weighted lottery for race and ethnicity (increase of 23% to 34% students of color from 2018 to 2022)



Black Excellence Award Recipients and BIPOC Affinity Club



Indigenous Studies Program

- Funded by a 3 year grant, 2019-2022 from the Gray Family Foundation
- Enabled a lead team to provide staff development, rethink our curriculum map and draft new lessons/units
- Reframed curriculum from westward expansion to eastward view
- Created curriculum kits to supplement existing units at each grade level in order to infuse indigenous perspectives
- Brought together a year long indigenous advisory committee to review our curriculum
- Disseminated our work at conferences in Washington and Oregon

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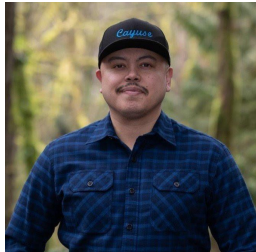
Indigenous Educator Advisory Group

Met bi-monthly during the 21/22 school year



Christine Bruno, Comanche with Basque, Irish and English heritage;

Clifton Bruno, Wasco, from the Confederated Tribes of the Warm Spring Reservation.



Gabe Sheoships, Cayuse and Walla Walla nations, from the Confederated Tribes of the Umatilla Reservation



Heather Shá xat k'ei Gurko, Citizen of Tlingit Nation and Dutch/Euro ancestry



Karen Kitchen, Osage Nation

Curricular Kit Topics

Kindergarten	Animals in Winter
1st/2nd Grades	Salmon, Mountains
3rd Grade	Native Plants, Geology
4th/5th Grades	Canoes, Oregon Tribes
6th Grade	TBA
7th/8th Grades	First Foods, Boarding Schools



Guest Speakers

Dr. Carma Corcoran:
tribal sovereignty, treaties,
and lifeways.

Linda Meanus,
great-granddaughter of
Chief Tommy Thompson:
importance of Celilo Falls

Greg Archuleta: lifeways,
Native plants and more.



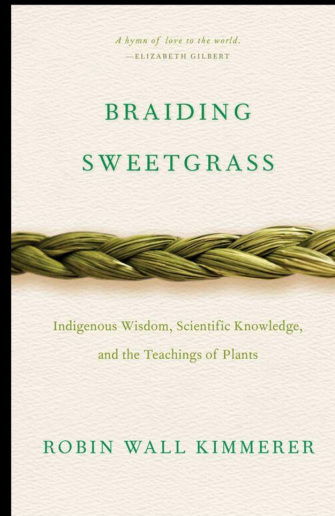
**Clifton and
Christine Bruno:**
First Foods, Native
plants and games

Leialoha Ka'ula:
volcanoes and Native
Hawaiian stories

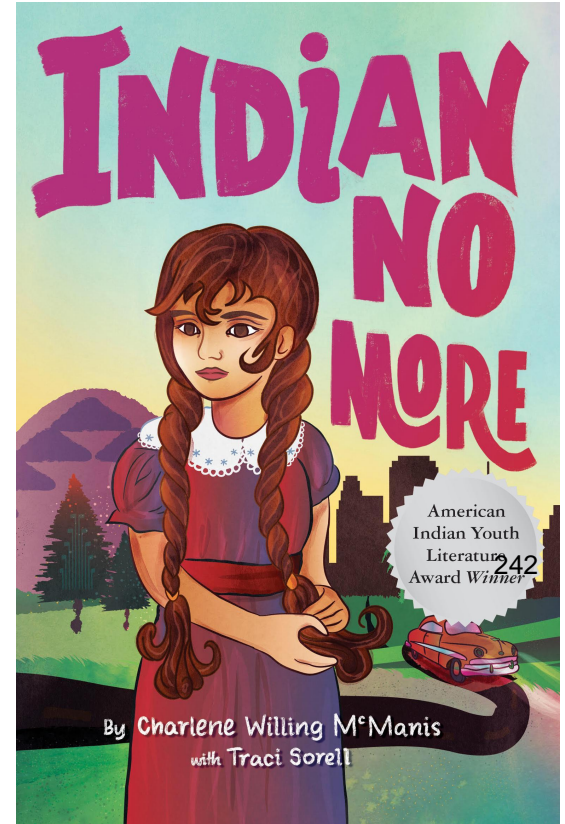
Karen Kitchen: ²⁴¹
storytelling and songs

Linda Meanus, Confederated Tribes
of the Warm Springs

Cottonwood Reads



2021



2022



Artist in
Residence:
Toma Villa,
Yakama Nation



Learning
about
salmon
with the
Brunos

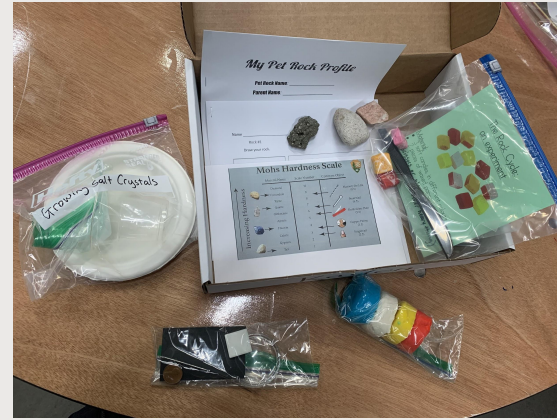


Lamprey Caretakers

COVID- Learning from Home

- Virtual learning started right after Spring Break!
- We intentionally kept screen time to a minimum while creating structure for students to fill their day doing!
- Learning kits kept students engaged
- Teachers visited with every student masked outside of their home, August 2020
- Hybrid - 50% of our families were willing to come back into the building, 50% were not
- Nearly 100% were comfortable outside, so hybrid with Fridays together in the park began!

Learning Kits-sent home as part of our distance learning

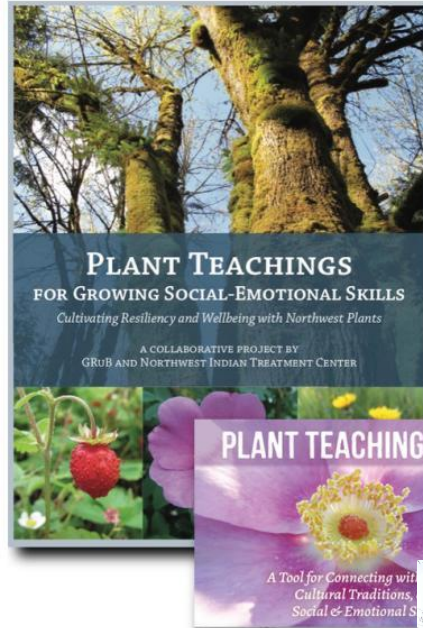


Park Days - Spring 2021



Plant Teachings

- Partnered with GRuB(Garden Raised Bounty), a non-profit in Olympia, WA to adopt the teachings of plants as part of our SEL curriculum
- Every month we learn from a new native plant.
- Hosted plant teaching nights for families
- Classrooms composed songs each month about the plants which will be recorded later this year.



Cottonwood School Plant Teachings- Selected Months

September: Cottonwood Tenders: 8th grade

Cottonwood represents **Wellspring**, which includes self-awareness, trueness to self, knowing who we are, where we come from, where we are: our identity

December: Cedar Tenders: Elizabeth's 4th/5th grade class

Cedar teaches us **Kindness and Generosity**, which includes learning how to give and receive graciously and cultivate strong relationships

February: Willow Tenders: Sara's 1st/2nd Grade Class

Willow teaches us **Flexibility**, which includes how we can be flexible in our mind, not getting stuck in emotions or rational thinking "rock brain," finding balance

March: Dandelion Tenders: Kindergarten

Dandelion's teaching is **problem-solving**, which includes responding creatively to life's challenges



Academics

English Language Arts

Our students showed very good performance on the 2021 statewide testing performing well above average compared to the state in English Language Arts.

Grade	Met or Exceeded the Standards
3rd	71% (State-40%)
4th	81% (State-43%)
5th	68% (State-48%)
6th	80% (State-42%)
7th	75% (State-48%)
8th	76% (State-46%)

Math

Like many schools we discovered that our students were returning to school with significant gaps in their learning.

Based on our internal assessments, **only 22%** of our students were at or above grade level in math in the fall. **By the end of the year this percentage had increased to 49%.**

Our students performed above average in math on the statewide testing in 2021 compared to the state.

Grade	Percent Proficient
3rd	45% (State-40%)
4th	45% (State-37%)
5th	50% (State-30%)
6th	30% (State-28%)
7th	62% (State-30%)
8th	43% (State-27%)

Math- % Proficient	Cottonwood	Portland Public Schools(3-8)
Students with Disabilities	51%	33%
Economically Disadvantaged Students	46%	45%
Underserved Race/Ethnicity	12%	17%
ELA- % Proficient	Cottonwood	Portland Public Schools(3-8)
Students with Disabilities	60%	32%
Economically Disadvantaged Students	74%	55%
Underserved Race/Ethnicity	62%	26%

Thank you for considering our renewal!



PATTISON Kate * ODE

From: Jillianne Bandstra <emailjillianne@gmail.com>
Sent: Tuesday, January 31, 2023 6:55 AM
To: PATTISON Kate * ODE
Subject: Support for Cottonwood

Good morning,

I'm writing in support of The Cottonwood School of Civics and Science. I am a parent of a current 6th and 3rd grader. Last year, my older son was finishing elementary and looking toward middle school. Our local middle school has nearly 750 kids. For a kid with autism (or any kid, for that matter), going from a classroom with ~25 kids that he knows and a consistent teacher to a school with that many kids and 6 periods a day created sheer panic. He does well in school without additional support, but he needs predictability and teachers and students that can get to know him. New social situations can often be overwhelming, coupled with overwhelm with trying to navigate a large school with so many kids in between periods-I was panicking myself. Middle school is such a tough time for many students, and I can only imagine how well it would go over socially when he has a breakdown at school. And then it would be a challenge to get him to return.

We were so thankful to find Cottonwood and to be accepted in the lottery. We're a new family, and he has been accepted warmly. The 6th-grade classroom is a homeroom-style classroom, and he's found a wonderful group of quirky kids who share his antiquated interests in blacksmithing, archery, and paper crafts. He and I can both take a sigh of relief for a few years.

Thank you so much for supporting charter schools like Cottonwood! My family is so grateful.

Warm Regards,
Jillianne Bandstra

PATTISON Kate * ODE

From: Julia Walls <juliarenewalls@gmail.com>
Sent: Tuesday, January 31, 2023 4:29 PM
To: PATTISON Kate * ODE
Subject: Cottonwood School of Civics and Science - charter renewal comment

Greetings,

My name is Dr. Julia Walls and I am a parent of 1st and 6th grade students. We have been part of the Cottonwood community for 7 years. My kids and I love this school because of the amazing and unique curriculum. As BIPOC students we appreciate the welcoming, safe environment the school has cultivated. We love the attention to growing social skills, the willingness to help neurodiverse students and creating learning opportunities in real-life. We chose this school for the place-based curriculum and have continued to love the special, engaging curriculum. My kids are thriving at this school and I strongly urge you to renew our charter. Thank you for supporting independent state charter schools like Cottonwood for students and families like ours.

Kind Regards,
Dr. Julia Walls

PATTISON Kate * ODE

From: Kate Sharaf <katesharaf@gmail.com>
Sent: Monday, February 13, 2023 2:47 PM
To: PATTISON Kate * ODE
Subject: cottonwood school charter renewal

Hi Kate -

I hope I'm not too late to submit comment on the cottonwood school charter renewal. I had signed up to comment during the hearing but I got on a bit late and it had already ended. I am a current parent at the school with students in 4th and K.

I am so grateful for the school and it's approach. My older kid has ADHD and I realize now that although she didn't have a diagnosis when she started at cottonwood in K, part of why we felt so aligned with the school was because the hands-on approach with lots of fieldwork is such a great fit for kids like mine. She has always been engaged in school and loves her teachers and the community. We are thrilled with the school-wide approach to social-emotional learning and think it does so much to support kids in learning to self-regulate and be together in community, and is such an asset to kids who need additional support in those areas such as mine.

My younger child has been dealing with significant anxiety and especially separation anxiety this year, and I could not be more happy with how the school has supported him, given him tools, and helped him feel safe and secure in the school environment. I love that the school approach to learning is very developmentally appropriate, especially at younger grades, and helps children keep their joy in learning and be able to explore, play, and move their bodies.

We are thrilled to have cottonwood school as a school home for our family and can't wait to see our kids continue to grow and learn in this community. We wholeheartedly support the school's application for a renewal of it's charter.

Thanks very much -
Kate Sharaf

PATTISON Kate * ODE

From: Melissa Sanchez <melissasanchez721@gmail.com>
Sent: Tuesday, January 31, 2023 4:25 PM
To: PATTISON Kate * ODE
Subject: TESTIMONY

;Hello and good evening,

I have not seen Ellie so happy in school. Ellie really enjoys the hands- on experience and field trips. I love how she understands the difference this experience has given to her vs mortar school. I am hopeful that Cottonwood be renewed for another 5 years.

I just wished that mortar followed .

thank you ,
Mel

PATTISON Kate * ODE

From: Rebecca Priest <rebarama@gmail.com>
Sent: Wednesday, February 1, 2023 9:47 AM
To: PATTISON Kate * ODE
Subject: Cottonwood School Renewal

Hi there,

We have been part of the Cottonwood community since my son was in kindergarten, he is currently in fifth grade. I also have a second grader.

We love the school and the joy our children have attending there. They are so activated and curious about what they are learning. It is the perfect fit for our family. The teachers and administrators really take time to get to know the students and help them thrive.

Thanks,

Rebecca Priest

PATTISON Kate * ODE

From: Yuri Kawano <yuri.kawano@gmail.com>
Sent: Tuesday, January 31, 2023 5:30 PM
To: PATTISON Kate * ODE
Subject: Written Testimony for Cottonwood School Charter Renewal

Hi,

My name is Yuri Baxter-Neal, and I am a parent of 3rd and 6th grade students. We have been part of Cottonwood for the last 7 years since my older child was in kindergarten. Also, since last school year, I have been working at the school as a playworker (being in charge of the play program there) and teacher aide.

The best part of Cottonwood is their teachers and the community. People say we need a village to raise a child, but Cottonwood is like the village we need. Not only does the school provide a place to learn but also a community to belong to, and a supportive environment we can ask for help. This sense of belonging and love and care our students have received from the school will be their base strength for them to thrive as who they are.

The school has been focusing on lowering the wall between the school and the community. Through their place-based/experience-based learning, the students can strengthen their sense of connection to the community, awareness of our responsibility as a steward of our land, and problem-solving skills. Those "human skills" are crucial skills for their/our future.

I fully support and ask for the renewal of the charter for Cottonwood school for our children and our community.

Thank you,
Yuri Baxter-Neal

--

YURI KAWANO BAXTER-NEAL

(720) 940-6386

E-mail: yuri.kawano@gmail.com

"Our attention has been hijacked and it's time we reclaim it toward those beings who really sustain us." - Robin Wall Kimmerer"

Oregon State Board of Education

April 20, 2023

AGENDA ITEM: 3.E.

<p>SUBJECT: School Sports Pre-Participation Examination Form: OAR 581-021-0041 Form and Protocol for School Sports Examinations</p> <p>STAFF NAME & OFFICE: Emily Nazarov, ODE Director's Office; Peter Weber, Oregon School Activities Association, and Dr. Michael Koester</p> <p>In OAR 581-021-0041, the State Board has adopted the form entitled "School Sports Pre-Participation Examination." The form establishes the protocol for school sports physicals for grades 7-12 and is used to document the required physical examination. The Oregon School Activities Association has updated the form. The OAR must be updated to adopt by reference the updated form.</p> <p><input type="checkbox"/> New Rule <input checked="" type="checkbox"/> Amend Existing Rule <input type="checkbox"/> Repeal Rule</p>	<p><input type="checkbox"/> First Reading <input type="checkbox"/> Presentation <input type="checkbox"/> No Presentation</p> <p><input checked="" type="checkbox"/> Action <input type="checkbox"/> Temp Rule <input type="checkbox"/> Presentation <input checked="" type="checkbox"/> No Presentation</p>
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BACKGROUND

ORS 336.479 states that school districts must require students who participate in extracurricular sports in grades 7 through 12 to have a physical examination prior to participation. The statute also states that the State Board of Education must by rule prescribe the form and protocol for the required examination.

In OAR 581-021-0041 Form and Protocol for School Sports Examinations, the State Board has adopted the form entitled "School Sports Pre-Participation Examination," which is developed by the Oregon Schools Activities Association (OSAA). The form establishes the protocol for school sports physicals for grades 7-12 and is used to document the required physical examination.

The OSAA, is a non-profit, board-governed organization comprised of 295 member high schools, both private and public. The OSAA is dedicated to ensuring equitable competition for Oregon high school students through OSAA-sponsored events. OSAA standardized rules of eligibility and competition, and put in place a standard of education regarding participation in interscholastic activities. Administered equally and fairly, OSAA policies strive to allow no one school to outweigh its brethren. A member of the National Federation of State High School Associations, the OSAA annually sponsors 113 team and 426 individual event state championships for students competing in 19 interscholastic sports and activities.

The OSAA's Sports Medicine Advisory Committee's (SMAC) primary purpose is to ensure the health and safety of student-athletes who participate in OSAA-sponsored activities. The SMAC

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includes physicians from various fields of practice, athletic trainers, affiliated organizations and OSAA staff. SMAC membership is listed in Attachment 6. The group convenes as necessary to address concerns and make recommendations to the OSAA Executive Board.

The entire OSAA SMAC met three separate times over the past six months to review the pre-participation physical exam form and suggest changes. A sub-committee of the SMAC met more often to thoroughly review the suggested changes and align with best practices in this area. The sub-committee also worked directly with OHA to gather mental-health related resources in one spot on the OSAA’s website (www.osaa.org/resources).

The proposed form and rule revisions were presented to the ODE Rules Advisory Committee for feedback in April.

SUMMARY OF PREVIOUS BOARD ACTION

This rule was revised by the Board in 2017 in order to adopt by reference the current School Sports Pre-Participation Examination form.

HAS THE RULE CHANGED SINCE LAST BOARD MEETING?

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

The following changes have been made to the School Sports Pre-Participation Evaluation form since the last meeting:

- History Section
 - Expanded Note at top to include FERPA language
 - Corrected wording in blue header at top of right column “be physically active”
 - Added sentence in footer referencing mental health related resources with direct link on OSAA website
- Physical Examination Section
 - Added Note at top to include FERPA language
 - Added sentence in footer referencing mental health related resources with direct link on OSAA website

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POLICY ISSUE OR CONCERNS

Historically the State Board has allowed a grace period of one year where providers could use either form while transitioning from old to new. OSAA and ODE propose that be allowed during this period of transition as well.

The Family Educational Rights and Privacy Act (FERPA) protects the privacy of students' education records. The term "education records" means, with certain exceptions, records that are: (1) directly related to a student; and (2) maintained by an educational agency or institution or by a party acting for the agency or institution. 34 CFR 99.3. Under FERPA, education records may include any student's health records that are maintained by schools or their agents. In order to ensure that school districts treat the pre-participation form as part of the student's education record and afford the record appropriate protections under FERPA, the following statement has been added to the School Sports Pre-Participation Evaluation form:

"The provider should keep a copy in the medical record. The school district should keep a copy of this form in the student's education records and treat the form according to the requirements of the Family Education Rights and Privacy Act (FERPA). Under FERPA, education records may include any student's health records that are maintained by schools."

OSAA SMAC has requested that the form be made available in multiple languages once finalized. Once the form is adopted, ODE will provide translated copies of the form to be made available on the OSAA website.

At the RAC meeting, a member asked whether a school district would accept the form if any portion of the history section was left blank. OSAA guidance to school districts has consistently been that the school district only needs the provider sign-off. The provider sign off follows this statement on the form:

"I have examined the above-named student and completed the preparticipation physical evaluation. The athlete does not present apparent clinical contraindications to practice and participate in the sport(s) as outlined above. A copy of the physical exam is on record in my office and can be made available to the school at the request of the parents. If conditions arise after the athlete has been cleared for participation, the provider may rescind the clearance until the problem is resolved and the potential consequences are completely explained to the athlete (and parents/guardians). This form is an exact duplicate of the current form required by the State Board of Education containing the same history questions and physical examination findings. I have also reviewed the "Suggested Exam Protocol"."

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In other words, if the medical provider clears the student for participation, the student should be allowed to participate regardless of whether a portion of the history section was left blank.

EQUITY IMPACT ANALYSIS

The mission of the OSAA is to serve member schools by providing leadership and state coordination for the conduct of interscholastic activities, which will enrich the educational experiences of high school students. The OSAA will work to promote interschool activities that provide equitable participation opportunities, positive recognition and learning experiences to students, while enhancing the achievement of educational goals.

OSAA SMAC has requested that the form be made available in multiple languages once finalized. ODE will provide translated copies of the form to be made available on the OSAA website.

FISCAL ANALYSIS

The proposed rules do not create a fiscal impact for school districts. OSAA makes the form available on its website. ODE will be working with OSAA to provide translated versions of the form once it is finalized.

EFFECT OF A "YES" OR "NO" VOTE

If the Board votes yes, the updated form will be made available for use. If the Board votes no, students and medical providers will be required to continue using the current form dated May 2017.

STAFF RECOMMENDATION

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

ATTACHMENTS

Attachment 1: Proposed revisions to OAR 581-021-0041 draft dated 3-10-2023
Attachment 2: Proposed School Sports Pre-Participation Examination Form dated April 2023

581-021-0041

Form and Protocol for Sports Physical Examinations

(1) The State Board of Education adopts by reference the form entitled "School Sports Pre-Participation Examination" dated ~~May, 2017~~ April, 2023. The form sets out the protocol for conducting the physical examination required for students who participate in extracurricular sports in grades 7 through 12 and that must be used to document the physical examination ~~and sets out the protocol for conducting the physical examination~~. The form may be used in either a hard copy or electronic format.

(2)(a) Medical providers conducting physicals of students who participate in extracurricular sports in grades 7 through 12 must use the School Sports Pre-Participation Form.

(b) Medical providers may use their electronic health records systems to produce the electronic form. ~~Medical providers conducting physicals of students who participate in extracurricular activities in grades 7 through 12 must use the form.~~

(2) ~~If the form is produced from an electronic medical record, t~~The form must contain the following statement above the medical provider's signature line:

This form is an exact duplicate of the current form required by the State Board of Education containing the same history questions and physical examination findings. I have also reviewed the "Suggested Exam Protocol".

(3) The completed forms must be returned to the school district following the examination.

~~(3) Medical providers conducting physicals on or after April 30, 2011 and prior to May 1, 2017 must use the form dated May 2010.~~

~~(4) Medical providers conducting physicals on or after May 1, 2017 and prior to May 1, 2018 may use either the form dated May 2010 or the form dated May, 2017.~~

(5) Medical providers conducting physicals on or after May 1, 2018 and prior to May 1, 2023 must use the form dated May, 2017.

(5) Medical providers conducting physicals on or after May 1, 2023 and prior to May 1, 2024 may use either the form dated May 2017 or the form dated April 2023.

(6) Medical providers conducting physicals on or after May 1, 2024 must use the form dated April 2023.

NOTE: The form can be found on the Oregon School Activities Association (OSAA) website:
www.osaa.org

Statutory/Other Authority: ORS 326.051

Statutes/Other Implemented: ORS 336.479

School Sports Pre-Participation Examination – Part 1: Student or Parent Completes

Revised April 2023

HISTORY FORM

(Note: Form to be completed by the patient and parent/guardian prior to seeing the provider. Providers keep a copy in the patient's record. Schools keep a copy in the student's education records according to the requirements of the Family Education Rights and Privacy Act (FERPA). Under FERPA, education records may include any student's health records that are maintained by schools.)



Please scan QR code for updated mental health related resources.

Name: _____ Date of birth: _____

Sex: _____ Age: _____ Grade: _____ School: _____ Sport(s): _____

Medicines and Allergies: Please list all of the prescription and over-the-counter medicines and supplements (herbal and nutritional) that you are currently taking.

Do you have any allergies? Yes No If yes, please identify specific allergy below.

Medicines Pollens Foods Stinging Insects

Over the last two weeks, how often have you been bothered by any of the following problems?
Give answers as 0 to 3, using this scale: 0 = Not at all; 1 = Several days; 2 = More than half the days; 3 = Nearly every day

Little interest or pleasure in doing things:	0	1	2	3	Feeling down, depressed, or hopeless:	0	1	2	3
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Note to Providers: If combined score is 3 or greater, the student should be further evaluated with the PHQ-9 to determine whether they meet criteria for a depressive disorder.

Explain "Yes" answers below. Circle questions you do not know the answers to.

GENERAL QUESTIONS	YES	NO
1. Do you have any concerns you would like to discuss with your provider?		
2. Has a doctor or other healthcare professional ever denied or restricted your participation in sports for any reason?		
3. Do you have any ongoing medical issues or recent illness?		
4. Have you had a COVID-19 infection that required hospitalization?		
THESE QUESTIONS LET US KNOW ABOUT THE HEALTH OF YOUR HEART	YES	NO
5. Have you ever passed out or nearly passed out during or after exercise?		
6. Have you ever had discomfort, pain, tightness or pressure in your chest during exercise?		
7. Does your heart ever race, flutter in your chest, or skip beats (irregular beats) during exercise?		
8. Has a doctor ever told you that you have any heart problems? If so, check all that apply: ___ High blood pressure ___ A heart murmur ___ High cholesterol ___ A heart infection ___ Kawasaki disease Other: _____		
9. Has a doctor ever ordered a test for your heart? For example, electrocardiography (ECG) or echocardiography.		
10. Do you get lightheaded or feel shorter of breath than your friends during exercise?		
11. Have you ever had a seizure?		
THESE QUESTIONS LET US KNOW ABOUT HEART HEALTH IN YOUR FAMILY. PLEASE ANSWER AS BEST YOU CAN.	YES	NO
12. Has any family member or relative died of heart problems or had an unexpected sudden death before age 35 years (including drowning or unexplained car accident)?		
13. Does anyone in your family have a genetic heart problem such as hypertrophic cardiomyopathy (HCM), Marfan syndrome, arrhythmogenic right ventricular cardiomyopathy (ARVC), long QT syndrome (LQTS), short QT syndrome (SQTS), Brugada syndrome or catecholaminergic polymorphic ventricular tachycardia (CPVT)?		
14. Has anyone in your family had a pacemaker or an implanted defibrillator before age 35?		

THESE QUESTIONS LET US KNOW ABOUT ANY BONE OR JOINT PROBLEMS THAT COULD LIMIT YOUR ABILITY TO BE PHYSICALLY ACTIVE.	YES	NO
15. Have you ever had a stress fracture or an injury to a bone, muscle, ligament, joint or tendon that caused you to miss a practice or game?		
16. Do you have a bone, muscle, ligament, or joint injury that bothers you?		
THESE QUESTIONS LET US KNOW ABOUT ANY CURRENT OR PAST MEDICAL ISSUES	YES	NO
17. Do you cough, wheeze, or have difficulty breathing during/after exercise?		
18. Are you missing a kidney, an eye, a testicle (males), your spleen, or any other organ?		
19. Do you have groin or testicle pain or a painful bulge or hernia in the groin area?		
20. Do you have any recurring skin rashes, or rashes that come and go, including herpes or methicillin-resistant Staphylococcus aureus (MRSA)?		
21. Have you had a concussion or head injury that caused confusion, a prolonged headache, or memory problems?		
22. Have you ever had numbness, had tingling, had weakness in your arms or legs or been unable to move your arms or legs after being hit or falling?		
23. Have you ever become ill while exercising in the heat?		
24. Do you or does someone in your family have sickle cell trait or disease?		
25. Have you ever had, or do you have any problems with your eyes or vision?		
THESE QUESTIONS LET US KNOW IF YOU ARE PROVIDING YOUR BODY WITH ENOUGH ENERGY (FUEL) WHEN YOU ARE PHYSICALLY ACTIVE	YES	NO
26. Do you worry about your weight?		
27. Are you trying to or has anyone recommended that you gain/lose weight?		
28. Are you on a special diet or do you avoid certain types of food or food groups?		
29. Have you ever had an eating disorder?		
30. Have you ever had a menstrual period? (If yes, please answer the following questions.)		
31. How old were you when you had your first menstrual period? _____		
32. When was your most recent menstrual period? _____		
33. How many periods have you had in the last 12 months? _____		

Explain "yes" answers here: _____

I hereby state that, to the best of my knowledge, my answers to the above questions are complete and correct.

Signature of Athlete _____ Signature of Parent/Guardian _____ Date _____

ORS 336.479, Section 1 (3) "A school district shall require students who continue to participate in extracurricular sports in grades 7 through 12 to have a physical examination once every two years." Section 1(5) "Any physical examination required by this section shall be conducted by a (a) physician possessing an unrestricted license to practice medicine; (b) licensed naturopathic physician; (c) licensed physician assistant; (d) certified nurse practitioner; or a (e) licensed chiropractic physician who has clinical training and experience in detecting cardiopulmonary diseases and defects."

Form adapted from ©2023 American Academy of Family Physicians, American Academy of Pediatrics, American College of Sports Medicine, American Medical Society for Sports Medicine, American Orthopedic Society for Sports Medicine, and American Osteopathic Academy of Sports Medicine. OHA mental health related resources can be found on the OSAA website via the QR code above or at <https://www.osaa.org/resources>.

PHYSICAL EXAMINATION FORM

(Note: Providers keep a copy in the patient's record. Schools keep a copy in the student's education records according to the requirements of the Family Education Rights and Privacy Act (FERPA). Under FERPA, education records may include any student's health records that are maintained by schools.)



Please scan QR code for updated mental health related resources.

Date of Exam: _____

Name: _____ Date of birth: _____

Sex: _____ Age: _____ Grade: _____ School: _____ Sport(s): _____

EXAMINATION		
Height:	Weight:	BMI %:
BP: / (/)	Pulse:	Vision R 20/ L 20/ Corrected <input type="checkbox"/> YES <input type="checkbox"/> NO
MEDICAL	NORMAL	ABNORMAL FINDINGS
Appearance		
Eyes/ears/nose/throat		
Lymph nodes		
Heart •Murmurs (auscultation standing, supine, with and without Valsalva)		
Pulses		
Lungs		
Abdomen		
Skin		
Neurologic		
MUSCULOSKELETAL		
Neck		
Back		
Shoulder/arm		
Elbow/forearm		
Wrist/hand/fingers		
Hip/thigh		
Knee		
Leg/ankle		
Foot/toes		

- Cleared for all sports without restriction
 - Cleared for all sports without restriction with recommendations for further evaluation or treatment for:
 - Not cleared
 - Pending further evaluation
 - For any sports
 - For certain sports: _____
 - Reason: _____
- Recommendations: _____

I have examined the above-named student and completed the preparticipation physical evaluation. The athlete does not present apparent clinical contraindications to practice and participate in the sport(s) as outlined above. A copy of the physical exam is on record in my office and can be made available to the school at the request of the parents. If conditions arise after the athlete has been cleared for participation, the provider may rescind the clearance until the problem is resolved and the potential consequences are completely explained to the athlete (and parents/guardians). This form is an exact duplicate of the current form required by the State Board of Education containing the same history questions and physical examination findings. I have also reviewed the "Suggested Exam Protocol".

Name of Provider (print/type): _____ Date: _____
 Address: _____ Phone: _____
 Signature of Provider: _____

ORS 336.479, Section 1 (3) "A school district shall require students who continue to participate in extracurricular sports in grades 7 through 12 to have a physical examination once every two years." Section 1(5) "Any physical examination required by this section shall be conducted by a (a) physician possessing an unrestricted license to practice medicine; (b) licensed naturopathic physician; (c) licensed physician assistant; (d) certified nurse practitioner; or a (e) licensed chiropractic physician who has clinical training and experience in detecting cardiopulmonary diseases and defects."

MUSCULOSKELETAL

Have patient:

1. Stand facing examiner
2. Look at ceiling, floor, over shoulders, touch ears to shoulders
3. Shrug shoulders (against resistance)
4. Abduct shoulders 90 degrees, hold against resistance
5. Externally rotate arms fully
6. Flex and extend elbows
7. Arms at sides, elbows 90 degrees flexed, pronate/supinate wrists
8. Spread fingers, make fist
9. Contract quadriceps, relax quadriceps
10. "Duck walk" 4 steps away from examiner
11. Stand with back to examiner
12. Knees straight, touch toes
13. Rise up on heels, then toes

To check for:

- AC joints, general habitus
- Cervical spine motion
- Trapezius strength
- Deltoid strength
- Shoulder motion
- Elbow motion
- Elbow and wrist motion
- Hand and finger motion, deformities
- Symmetry and knee/ankle effusion
- Hip, knee and ankle motion
- Shoulder symmetry, scoliosis
- Scoliosis, hip motion, hamstrings
- Calf symmetry, leg strength

MURMUR EVALUATION – Auscultation should be performed sitting, supine and squatting in a quiet room using the diaphragm and bell of a stethoscope.

Auscultation finding of:

1. S1 heard easily; not holosystolic, soft, low-pitched
2. Normal S2
3. No ejection or mid-systolic click
4. Continuous diastolic murmur absent
5. No early diastolic murmur
6. Normal femoral pulses
(Equivalent to brachial pulses in strength and arrival)

Rules out:

- VSD and mitral regurgitation
- Tetralogy, ASD and pulmonary hypertension
- Aortic stenosis and pulmonary stenosis
- Patent ductus arteriosus
- Aortic insufficiency
- Coarctation

CONCUSSION -- When can an athlete return to play after a concussion?

After suffering a concussion, no athlete should return to play or practice on the same day. Previously, athletes were allowed to return to play if their symptoms resolved within 15 minutes of the injury. Studies have shown that the young brain does not recover that quickly, thus the Oregon Legislature has established a rule that no player shall return to play following a concussion on that same day and the athlete must be cleared by an appropriate health care professional before they are allowed to return to play or practice.

Graduated, Step-wise Return-to-Participation Progression: A medical release is required by [ORS 336.485](#), [ORS 417.875](#) before returning to participation.

1. **Symptom-Limited Activity:** Relative rest up to 48-72 hours. Allow low intensity physical and cognitive activity. May include staying home or limiting school hours and/or homework. Gradually reintroduce very light activity while limiting symptoms.
2. **Light Aerobic Exercise:** Walking or stationary bike at low to moderate intensity; no contact, resistance or weight training.
3. **Sport Specific Exercise:** Sprinting, dribbling basketball or soccer; no helmet or equipment, no head impact activities.
4. **Non-Contact Training:** More complex drills in full equipment. Weight training or resistance training may begin.

****Before moving to the next stage, the athlete must be fully recovered, medically cleared, and in school full-time without accommodations.**

5. **Full-Contact Practice:** Participate in normal full-contact training activities.
6. **Unrestricted Return-to-Participation / Full Competition:** Game play against opposing team.

The athlete should spend a minimum of one day at each step. If symptoms re-occur, the athlete must stop the activity and contact their athletic trainer or other health care professional. Depending upon the specific type and severity of the symptoms, the athlete may be told to rest for 24 hours and then resume activity one-step below the level when the symptoms occurred. Graduated progression applies to all activities including sports and PE classes.

581-021-0041 Form and Protocol for Sports Physical Examinations

1. The State Board of Education adopts by reference the form entitled "School Sports Pre-Participation Examination " dated April 2023 that must be used to document the physical examination and sets out the protocol for conducting the physical examination. The form may be used in either a hard copy or electronic format. Medical providers may use their electronic health records systems to produce the electronic form. Medical providers conducting physicals of students who participate in extracurricular activities in grades 7 through 12 must use the form.
2. If the form is produced from an electronic medical record, it must contain the following statement above the medical provider’s signature line:
This form is an exact duplicate of the current form required by the State Board of Education containing the same history questions and physical examination findings. I have also reviewed the "Suggested Exam Protocol".
3. Medical providers conducting physicals on or after May 1, 2018 and prior to May 1, 2023 must use the form dated May 2017.
4. Medical providers conducting physicals on or after May 1, 2023 and prior to May 1, 2024 may use either the form dated May 2017 or the form dated April 2023.
5. Medical providers conducting physicals on or after May 1, 2024 must use the form dated April 2023.

NOTE: The form can be found on the Oregon School Activities Association (OSAA) website at <https://www.osaa.org/health-safety>.
Statutory/Other Authority: ORS 326.051
Statutes/Other Implemented: ORS 336.479

Oregon State Board of Education

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AGENDA ITEM: 4.A.

<p>SUBJECT: 581-xxx-xxxx: Migrant Education Program Appeals Process (Temp Rule) STAFF NAME & OFFICE: Liz Ross, Office of Teaching, Learning, and Assessment</p> <p>The Oregon Department of Education (the Department) administers Oregon’s Migrant Education Program, funded through the federal Title I-C grant program. Federal law requires that ODE provide grant recipients who are aggrieved by the Department’s final action under its administration of the Title I-C grant program with the right to request a hearing. This rule establishes such a process.</p> <p><input checked="" type="checkbox"/> New Rule <input type="checkbox"/> Amend Existing Rule <input type="checkbox"/> Repeal Rule</p>	<p><input type="checkbox"/> First Reading <input type="checkbox"/> Presentation <input type="checkbox"/> No Presentation</p> <p><input checked="" type="checkbox"/> Action <input checked="" type="checkbox"/> Temp Rule <input type="checkbox"/> Presentation <input type="checkbox"/> No Presentation</p>
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BACKGROUND

1. History: Section 432 of the General Education Provisions Act (GEPA), codified at 20 USC 1231b-2(a), provides Local Education Agencies (LEAs) “aggrieved by the final action” of a State Education Agency (SEA) with the right to “request a hearing” alleging a violation of the laws applicable to the respective federal program being administered by the SEA. The same federal statute then goes on to require: “Within thirty days after it receives such a request, the [SEA] shall hold a hearing on the record and shall review such final action. No later than ten days after the hearing, the [SEA] shall issue its written ruling, including reasons therefor.” (See also 34 CFR 76.401.)
As Oregon’s SEA, the Oregon Department of Education (the Department) administers Oregon’s Migrant Education Program, funded through the federal Title I-C grant program. This means that Oregon’s Migrant Education Program is subject to the federal requirements described above.
2. Purpose: This proposed temp rule establishes the process for school districts or ESDs aggrieved by a final action under the Department’s administration of the Title I-C grant program to request a hearing, as required under federal law.
3. Does the board have any areas of discretion or is this strictly mirroring statute? No, the board does not have any areas of discretion.
4. Stakeholder voice/input (individual and collective i.e., groups): This temp rule is a technical rule that establishes a hearing process that meets the requirements under both governing federal and state law. As such, the Department has little discretion in shaping the process, meaning there is little room to consult with impacted groups and apply their input. That said, when developing a permanent rule, the Department will ensure broad communication and notice to those potentially impacted by the rule.

SUMMARY OF PREVIOUS BOARD ACTION

1. Has this been before the board before? No.

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HAS THE RULE CHANGED SINCE LAST BOARD MEETING?

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

POLICY ISSUE OR CONCERNS

This temp rule is a technical rule that establishes a hearing process that meets the requirements under both governing federal and state law. As a result, the Department has little discretion in shaping the process, meaning there is little room to consider policy issues or consult with impacted groups and apply their input.

One minor policy issue the Department considered in developing this temp rule was whether to retain authority for issuing the final order following the hearing or grant that authority to the Administrative Law Judge presiding over the hearing. Due to considerations around timeline and the Department's capacity, the Department chose to grant this authority to the Administrative Law Judge.

EQUITY IMPACT ANALYSIS

Any final action taken by the Department against an LEA as part of its administration of the Migrant Education Program will have a direct impact on the migrant students and families served by that LEA. The Department strives always to ensure its actions advance equity and opportunity for historically underserved populations, including Oregon's diverse community of migrant students. The hearing process established by this temp rule affords LEAs administering a local or regional Migrant Education Program funded through Title I-C the opportunity to appeal a final action taken by the Department that the LEA believes adversely affects the LEA, and by extension, the students it serves. As such, the temp rule plays an essential part in ensuring due process in the Department's administration of Oregon's Migrant Education Program under the federal Title I-C program.

FISCAL ANALYSIS

Should an LEA exercise its right to request a hearing under the process established by this temp rule, the Department would incur costs associated with contracting with the Office of Administrative Hearings to administer a hearing, as well as costs from the Oregon Department of Justice to represent the Department in the hearing.

EFFECT OF A "YES" OR "NO" VOTE

A Board vote approving this temp rule would result in the immediate creation of a process by which aggrieved LEAs could request a hearing contesting a final action by the Department under its administration of Oregon's Migrant Education Program, thereby complying with federal requirements.

A Board vote rejecting this temp rule would mean that the Department would remain out of compliance with the federal requirement to provide aggrieved LEAs with the right to request a hearing.

STAFF RECOMMENDATION

- Approve
- Approve next month
- No recommendation at this time

Oregon State Board of Education

April 20, 2023

AGENDA ITEM: 4.A.

Prompted by: State law changes Federal law changes other (*out of compliance with existing federal law*)

ATTACHMENTS

Attachment 1: Draft Rules

OAR XXX-XXX-XXXX: Migrant Education Program Appeals Process

(1) The appeal procedures required by this rule apply to appeals of decisions made by the Oregon Department of Education (the Department) affecting local education agencies within the Migrant Education Program regarding:

- (a) The disapproval, in whole or in part, of a new application for participation or an application for renewed participation;
- (b) A failure to approve a new application for participation or an application for renewed participation;
- (c) The suspension of participation;
- (d) The failure to provide funds in amounts that accord with the requirements of specific laws and regulations;
- (e) An order, in accordance with a final State audit resolution determination, to repay misspent or misapplied Federal funds; and
- (f) The termination of further assistance.

(2) Except as otherwise specified in this rule, appeals of actions identified in subsection (1) of this rule shall be conducted as a contested case hearing under ORS 183.411 to 183.471 and the Attorney General's Model Rules of Procedure under the Administrative Procedure Act in effect on January 1, 2012.

(3) The Department shall notify the local education agency (Appellant) in writing of the grounds upon which the Department based its action identified in section (1) of this rule. The notice shall state the procedures for requesting an appeal of the action. Notice means a letter sent by certified mail, return receipt (or the equivalent private delivery service), by facsimile, or by email, that describes an action taken by the Department. The notice is considered to be received by the Appellant when it is delivered, sent by facsimile, or sent by email. If the notice is undeliverable, it is considered to be received by the Appellant five days after being sent to the Appellant's last known mailing address, facsimile number, or email address.

(4) A request for appeal of an action identified in section (1) of this rule must be in writing and must be made by the Appellant affected by such action. The Department must receive the request for appeal no later than 30 calendar days from the date the Appellant received the notice of Department action. The request is considered to be received by the Department when it is delivered, sent by facsimile, or sent by email, using the contact information contained in the notice. The request for appeal must allege in pleadings, affidavits, and supporting documents that the Department violated State or Federal law, rules, regulations, or guidelines governing the Migrant Education Program.

(5) The Department shall deny any request for appeal that fails to:

- (a) State the nature of the Appellant's interest;
- (b) Assert the facts showing how the Appellant is adversely affected or aggrieved by the Department's action; and
- (c) Allege the grounds upon which the Department violated State or Federal law, rules, regulations, or guidelines governing the Migrant Education Program.

(6) The hearing shall be conducted by and under the control of the Administrative Law Judge of the Office of Administrative Hearings that is assigned to the case and must be held within 30 days of the date on which the Department receives the request for appeal. The Administrative Law Judge may set

reasonable time limits for oral presentation and may exclude or limit cumulative, repetitious, or immaterial matter.

(7) The Appellant bears the burden of proof to show that the Department's action identified in section (1) of this rule constitutes a violation of State or Federal law, rules, regulations, or guidelines governing the Migrant Education Program.

(8) Evidence of a type commonly relied upon by reasonably prudent persons in the conduct of their serious affairs shall be admissible. Irrelevant, immaterial or unduly repetitious evidence shall be excluded.

(9) The Administrative Law Judge is authorized to and shall issue a final order, without first issuing a proposed order, in accordance with OAR 137-003-0665.

20 USC 1231b-2
34 CFR 76.401



Migrant Education Program Appeals Process (Temp Rule)

April 20, 2023

Liz Ross, Director of Federal Systems

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Overview

- Federal law requires that ODE provide grant recipients who are aggrieved by the ODE's final action under its administration of any federal grant programs with the right to request a hearing
- ODE's continuous improvement process has identified a gap in meeting this requirement for certain federal title grant programs that ODE administers
- This rule establishes such an appeals process for the Title I-C Migrant Education Program that complies with federal requirements
- ODE plans to come back to the Board to adopt a permanent rule in October 2023

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Federal Requirements for Appeals Process

Section 432 of the General Education Provisions Act (GEPA):

- Provides any applicant or recipient “aggrieved by the final action” of a State Education Agency (SEA) with the right to “request a hearing on the record” alleging a violation of the laws applicable to the respective federal program being administered by the SEA.
- Requires that, “Within thirty days after it receives such a request, the [SEA] shall hold a hearing on the record and shall review such final action. No later than ten days after the hearing, the [SEA] shall issue its written ruling, including reasons therefor.”

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Citations: 20 USC 1231b-2(a); see also 34 CFR 76.401(d) and 34 CFR 76.863

What the Proposed Temp Rule Does

- Establishes the process for school districts or ESDs aggrieved by a final action under ODE's administration of the Title I-C grant program to request a hearing, including:
 - Final actions subject to appeals process
 - Structure of appeals process as a contested case hearing to be administered by the Office of Administrative Hearings
 - Notice requirements
 - Appeals eligibility criteria
 - Burden of proof and evidentiary standards
- Brings ODE's administration of the Title I-C grant program into compliance with federal requirements under GEPA

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ODE's Recommendation

- ODE recommends the State Board adopt the proposed temp rule

Next Steps

- ODE is in the process of reviewing other title grant programs to ensure an appeals process is in place for all federal grant programs
- ODE will return to the State Board with a permanent rule this fall
 - 1st Read in September 2023
 - Adoption in October 2023
- ODE may expand the scope of the proposed permanent rule to include additional title grant programs as needed

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Questions?



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Oregon State Board of Education

April 20, 2023

AGENDA ITEM: 5.A.

<p>SUBJECT: Instructional Materials List Update - New Edition of Curriculum Associates' K-5 iReady Math, OAR 581-011-0086</p> <p>STAFF NAME & OFFICE:</p> <p>The publisher, Curriculum Associates, has requested to update the 2020 version of K-1 iReady math materials, adopted by the State Board of Education in 2022, to the 2024 update. Substituted materials will be supplied to Oregon schools at the contract price of the originally adopted edition unless the price for the substituted price is lower than the 2020 contract price. The updated materials have been reviewed by OTLA's math education specialist, Mark Freed, who has confirmed the change to be an appropriate update.</p> <p><input type="checkbox"/> New Rule <input type="checkbox"/> Amend Existing Rule <input type="checkbox"/> Repeal Rule</p>	<p><input checked="" type="checkbox"/> First Reading</p> <p><input checked="" type="checkbox"/> Presentation</p> <p><input type="checkbox"/> No Presentation</p> <p><input type="checkbox"/> Action</p> <p><input type="checkbox"/> Temp Rule</p> <p><input type="checkbox"/> Presentation</p> <p><input type="checkbox"/> No Presentation</p>
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BACKGROUND

The State Board of Education adopted Curriculum Associates' iReady Math 2020 edition as a recommended instructional resource for mathematics in October 2022. In 2023, the publisher Curriculum Associates published an updated edition of iReady Math. The updated version meets the mathematics adoption criteria set by the State Board of Education in 2022. The updated edition of iReady Math includes minor changes that increase the cultural and linguistic responsiveness of the materials.

Mark Freed, ODE's Mathematics Education Specialist, has completed a review of the materials to confirm that they are an appropriate update. Additionally, Northwest Textbook Depository was engaged to confirm that the update was appropriate and would not negatively affect districts currently using the 2020 edition of iReady. Districts would now be able to purchase the updated version of iReady for a contract price through Northwest Textbook Depository without conducting a formal independent adoption.

The State Board of Education has the discretion to approve the update to iReady or decline Curriculum Associates' request to update the materials from the 2020 edition to the 2024 edition. We are asking the State Board of Education to approve adding the new edition of iReady Math to the list of recommended mathematics instructional materials.

SUMMARY OF PREVIOUS BOARD ACTION

The math instructional materials list was adopted by the State Board of Education in October 2022. The request to update Curriculum Associates' K-5 iReady Math from the 2020 edition to the 2024

Oregon State Board of Education

April 20, 2023

AGENDA ITEM: 5.A.

edition has not previously been brought before the Board. However, the Board last approved a substitution for English Language Arts instructional materials under OAR 581-011-0086 at the March 2023 Board meeting.

HAS THE RULE CHANGED SINCE LAST BOARD MEETING?

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

POLICY ISSUE OR CONCERNS

The impact of this approval is that districts will be allowed to purchase the updated edition of iReady for a stable contract price, guaranteed through January 2030, without conducting a formal independent adoption. Independent adoptions require districts to invest resources (time, labor, funds) in order to purchase and implement the materials. Since ODE has already reviewed the materials and confirmed they are appropriate for recommendation, districts who choose to use iReady 2024 will be positively impacted. The update to the mathematics adopted materials list will allow access to updated materials while maintaining the current contract price. ODE has considered all unintended consequences, and recommends the approval of this addition to the mathematics Instructional Materials list.

EQUITY IMPACT ANALYSIS

Districts will now have access to updated mathematics materials for the same price as the currently recommended 2020 edition. The updates to mathematics are intended to increase the cultural and linguistic responsiveness and relevance of the materials, and were developed to have a positive impact on student engagement.

According to the publisher, the K-1 updates include additional guidance on supporting the math practice standards, enhanced protocols for engagement that connects to more cultures, and support for language development for all children. The publisher reports that these enhancements were already made in grades 2-8 in 2022, but were not available for grades K-1 at the time of our state review. The updates to the K-1 materials are now ready, and would provide greater consistency across elementary grade levels.

FISCAL ANALYSIS

The proposed update to iReady is fiscally beneficial to districts. Allowing the material to be officially updated gives districts the opportunity to purchase the 2024 edition of iReady for the contract price of the 2020 edition of iReady. This will ultimately lead to cost savings for districts.

EFFECT OF A "YES" OR "NO" VOTE

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April 20, 2023

AGENDA ITEM: 5.A.

A “YES” vote would allow ODE to substitute the 2020 edition of K-5 iReady Math to the mathematics instructional materials list for the remainder of the contract period (through January 2030).

A “NO” vote would deny the publisher’s request to substitute the 2020 edition of K-5 iReady Math to the mathematics instructional materials list

STAFF RECOMMENDATION

Approve Approve next month No recommendation at this time

Prompted by: State law changes Federal law changes other

ATTACHMENTS

Attachment 1: OR iReady Substitution Request



February 7, 2023

Oregon Department of Education
255 Capitol St. NE
Salem, OR 97310

RE: Request for Substitution of *i-Ready Classroom Mathematics, Oregon Edition—Grades K–1*

Dear Aujalee Moore:

With this letter, we request to substitute the new ©2024 copyright of the following ©2020 State-approved *i-Ready Classroom Mathematics, Oregon Edition* resources at grades K–1.

The ©2024 Differences were made to focus on enhancing the program based on Oregon priorities and the OR IMET. These updates are as follows:

- **Standards for Mathematical Practice (SMP):** SMP labels at point of use to make clear how and where the SMP are integrated into the lesson.
- **Enhanced CLR Support: Protocols for Engagement:** Added Protocols for Engagement on Connect to Culture page. The protocols validate the cultural behaviors that are part of students' identities and provide a way to embrace students' home cultures.
- **Connect to Culture:** Supports children in leveraging their backgrounds and experiences to connect with the thematic content of the lesson.
- **Support for Language Development:** A variety of supports are included to facilitate the development of academic language for all children.

As the 2022 Oregon Mathematics Adoption programs are intended for use beginning fall 2023, and have not yet been implemented in classrooms, there are no compatibility issues with the ©2024 editions.

Please contact me if you require any additional information in support of this request. I will send a revised bid with new ISBNs once we are approved unless you would like that information now. Please note, the materials will be supplied to Oregon schools at the contract price of the originally adopted edition.

Sincerely,

A handwritten signature in blue ink that reads "Emily McCann".

Emily McCann

VP, Educator Community, Policy and Proposals

Oregon State Board of Education

April 20, 2023

AGENDA ITEM: 5.B.

<p>SUBJECT: Division 22 Waiver Request: Eugene 4J School District STAFF NAME & OFFICE: Susan Payne, Office of Teaching, Learning and Assessment</p> <p>Eugene 4J School District is requesting a waiver of the Division 22 Standards Prevention Education in Drugs and Alcohol and Human Sexuality Education for the 2022-23 school year.</p>	<p><input type="checkbox"/> First Reading <input type="checkbox"/> Presentation <input type="checkbox"/> No Presentation</p> <p><input type="checkbox"/> Action <input type="checkbox"/> Temp Rule <input type="checkbox"/> Presentation <input type="checkbox"/> No Presentation</p>
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BACKGROUND

Division 22 Standards

The State Board of Education has established educational standards every district must implement. Those standards are set forth in OAR Chapter 581, Division 22 (“Division 22 standards”). Districts are required to report their compliance with Division 22 standards to the district school board and submit assurances of their compliance to the Department.

Districts may apply for a waiver of a Division 22 standard under OAR 581-002-3035:

- (1) Waiver of a specific standard: To address an immediate concern or need, a school district may petition the State Superintendent of Public Instruction for a waiver of a specific standard. A petition shall specify the reason(s) the district is seeking the waiver and other relevant information. If it is determined that the request conforms with the intent of the standards, the State Superintendent shall recommend the waiver to the State Board. Waivers under this provision may be granted for up to one year.

Request for Waiver

Eugene 4J School District is requesting a one-year waiver of the Division 22 Standards OAR 581-022-2045 Prevention Education in Drugs and Alcohol and OAR 581-022-2050 Human Sexuality Education. This waiver is for the current 2022-23 school year.

The district first reported out of compliance for these rules in February 2020 (reporting on the 2018-19 school year). The district stated on its assurances that the corrective action for Prevention Education in Drugs and Alcohol would be complete by the beginning of the 2020-21 school year. For Human Sexuality Education the district stated: In November 2018, a bond measure was passed that provides funding for a full K-12 Health curriculum adoption. As part of

Oregon State Board of Education

April 20, 2023

AGENDA ITEM: 5.B.

this curricular adoption process, the district is currently developing a Comprehensive Human Sexuality Plan that will go before the board for consideration by the end of the 2020-21 school year.

Due to impacts from the COVID-19 pandemic, many districts, including Eugene 4J, requested an extension of the deadline to complete corrective action. Eugene's request (made in November of 2020) included a revised corrective action plan and timeline, stating that full implementation would be complete by the beginning of the 2021-22 school year. The extension was approved by ODE.

The next update that ODE received on the district's progress was submitted in November 2021 when the district submitted Division 22 assurances for the 2020-21 school year. The update indicated that the district was still in the process of implementing corrective action. This was consistent with reports from several other districts that had been out of compliance with one or both of these same rules. Due to the challenges districts were contending with because of the pandemic, ODE prolonged the previously granted extension to the start of the 2022-23 school year. In February 2022, ODE notified the district of this deadline, and informed the district that "If the district is not fully compliant with this rule by that time, the district will need to seek a waiver from the State Board of Education to avoid any impact on the disbursement of state school fund dollars."

In April 2022, ODE staff met with district leadership to discuss progress on the plan and to provide technical assistance as needed. The district shared that the plan would likely not be complete by September 2022, but within a month or two of the deadline. ODE confirmed in writing that if the district needed additional time to complete the corrective action beyond the first day of the 2022-23 school year, it would be necessary to request a waiver from the State Board of Education. ODE provided the district with the option to make the request proactively in June of 2022, or to wait until the September meeting, as there was a slight possibility that the district could meet the deadline. In July 2022, ODE sent a final reminder of the deadline and the need for a waiver if it was not met.

The next communication ODE received from the district was on the Division 22 assurances report in November 2022. The update indicated that the corrective action was not yet complete. ODE Assistant Superintendent Jennifer Patterson met with Eugene 4J Superintendent Andy Dey on December 7, 2022. As the district's newly hired superintendent, Dey had not been copied on previous communications nor was he in attendance at previous Division 22 outreach meetings with ODE.

ODE has worked with district leadership over the last several months to gain clarity on the district's current status and to provide technical assistance. Director Gill sent an official Notice of Failure to Comply with Division 22 Standards to the district on March 21, 2023 (attached). The letter states that "the Department is considering taking action and may begin to withhold

Oregon State Board of Education

April 20, 2023

AGENDA ITEM: 5.B.

5% of State School Fund moneys allocated to the District from a future distribution. [The district] may request a waiver of the standards for the 2022-2023 school year to avoid any impact on the disbursement of State School Fund moneys.”

SUMMARY OF PREVIOUS BOARD ACTION

The vast majority of waiver requests that have come before the Board in recent years have been for OAR 581-022-2320 Required Instructional Time. One recent exception is the waiver granted to Mt. Angel School District for the Media Programs rule in the 2021-22 school year. Impacts from the pandemic and the scope of the plan (reestablishing the high school library space and program) were key factors in the district’s inability to complete corrective action within the standard time frame.

Instructional Time Waivers (past five years)

2021-22 school year: The State Board granted a waiver of OAR 581-022-2320 Required Instructional Time to the Centennial School District for the 2021-22 school year, because of school closures due to inclement weather and staff absences from COVID-19.

2020-21 school year: The Centennial School District was previously granted a waiver of OAR 581-022-2320 Required Instructional Time by the Board for the 2020-21 school year. A cybersecurity incident, fires, and inclement weather/power outages were all factors that led to unanticipated school closures. The State Board also granted waivers of the Division 22 standard Required Instructional Time to the North Santiam, Oakridge, Paisley, Phoenix-Talent, and Pleasant Hill School Districts. These districts were primarily impacted by forest fire.

2017-18 school year: The State Board granted waivers of the Division 22 standard Required Instructional Time to Brookings Harbor School District, Central Curry School District, and Corbett School District. Brookings Harbor School District and Central Curry School District were impacted by the Chetco Bar fire; Corbett was impacted by the Eagle Creek Fire.

HAS THE ITEM CHANGED SINCE LAST BOARD MEETING?

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

EFFECT OF A “YES” OR “NO” VOTE

If the Board approves the waiver, Eugene 4J School District will have a one-year waiver for the Division 22 Standards Prevention Education in Drugs and Alcohol and OAR 581-022-2050

Oregon State Board of Education

April 20, 2023

AGENDA ITEM: 5.B.

Human Sexuality Education. The district will continue to implement its approved corrective action plan to come into compliance with these standards by the beginning of the 2023-24 school year. With a waiver in place, the district will not be subject to withholding of state school fund moneys. ODE will continue to monitor the district’s progress and provide technical assistance as needed throughout the rest of the 2022-23 school year and the summer of 2023.

If the Board does not approve the waiver, Eugene 4J School District will be subject to the provisions of [ORS 327.103](#) Standard school presumed, and the Department may begin to withhold 5% of State School Fund moneys allocated to the District from a future distribution.

STAFF RECOMMENDATION

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

ATTACHMENTS

Attachment 1: Letter requesting waiver from Andy Dey, Superintendent of Eugene 4J School District

Attachment 2: Eugene 4J Secondary Health Adoption Timeline

Attachment 3: Notice of Failure to Comply with Division 22 Standards (March 21, 2023)



Oregon

Tina Kotek, Governor



OREGON
DEPARTMENT OF
EDUCATION

Oregon achieves . . . together!

Colt Gill

Director of the Department of Education

March 21, 2023

Andy Dey, Superintendent

Eugene School District 4J

200 North Monroe St.

Eugene, OR 97402

RE: Notice of failure to complete proposed actions to come back into compliance with Division 22 standards OAR 581-022-2045 Prevention Education in Drugs and Alcohol and OAR 581-022-2050 Human Sexuality Education

Superintendent Dey:

In February 2020, Eugene School District 4J (the District) submitted to the Oregon Department of Education (ODE) Division 22 Assurances for the 2018-2019 school year. The District self-reported out of compliance with the Division 22 standards OAR 581-022-2045 Prevention Education in Drugs and Alcohol and OAR 581-022-2050 Human Sexuality Education.

The attached table, titled “Eugene 4J and ODE Communications History Re: Division 22 Compliance with OAR 581-022-2045 Prevention Education in Drugs and Alcohol and OAR 581-022-2050 Human Sexuality Education,” details the communication between the District and ODE following the District’s 2018-19 assurances.

Division 22 Assurances for the 2018-19 school year

In February 2020, the District reported out of compliance with the two standards. The District proposed corrective action to be completed in the 2020-21 school year. ODE approved the proposed corrective action but informed the District that the corrective action must be completed by the beginning of the 2020-21 school year. In the fall of 2020, the District requested and was granted an extension of one year to complete the proposed corrective action for the two standards.

Division 22 Assurances for the 2019-20 school year

Districts were not required to report on the two standards for the 2019-20 school year because of impacts due to COVID.

Division 22 Assurances for the 2020-21 school year

In November 2021, the District reported “implementing corrective action” for the two standards on the Division 22 Assurances for the 2020-21 school year. In February 2022, ODE informed the District by email that the corrective action for these two standards should have been completed by the start of the 2021-22 school year but agreed to extend the time for compliance to the start of the 2022-23 school year. ODE stated: “We understand the challenges that you are contending with due to the pandemic and have therefore prolonged the previously granted extension to the start of the 2022-23 school year. If the district is not fully compliant with this rule by that time, the district will need to seek a waiver from the State Board of Education to avoid any impact on the disbursement of state school fund dollars.”

On December 7, 2022, ODE met with you to discuss the District’s status on multiple standards, including the two at issue here. ODE informed you that the corrective action deadline was the start of the 2022-23 school year and that if the District was not back in compliance the District would have to request a waiver from the State Board of Education. At that meeting, the superintendent said that the report of continued non-compliance may have been in error and that he would confirm the District's actual status.

On March 3, 2023, the District provided an updated Division 22 status plan. Based on that plan, ODE has determined that the District has not completed corrective action and remains out of compliance on the two standards.

On March 14, 2023, ODE met with the District to preview next steps and the process by which the District may request a waiver to the State Board of Education.

The deadline to complete the proposed actions to come back into compliance with OAR 581-022-2045 Prevention Education in Drugs and Alcohol and OAR 581-022-2050 Human Sexuality Education has now passed. The District has failed to complete the proposed actions to come back into compliance within the time specified by the Deputy Superintendent, Colt Gill.

Under ORS 327.103(2), if any deficiencies are not corrected before the beginning of the school year next following the date of the finding of deficiency or the date of extension granted by the Deputy Superintendent, the Department may withhold portions of State School Fund moneys otherwise allocated to the school district for operating expenses until such deficiencies are corrected. The purpose of this letter is to inform you that the Department is considering

taking action and may begin to withhold 5% of State School Fund moneys allocated to the District from a future distribution.

You may request a waiver of the standards for the 2022-2023 school year to avoid any impact on the disbursement of State School Fund moneys. OAR 581-002-0035(1) provides:

(1) Waiver of a specific standard: To address an immediate concern or need, a school district may petition the Director for a waiver of a specific standard. A petition shall specify the reason(s) the district is seeking the waiver and other relevant information. If it is determined that the request conforms with the intent of the standards, the Director shall recommend the waiver to the State Board. Waivers under this provision may be granted for up to one year.

You must submit your waiver request to ODE by April 10 so that it may be presented to the State Board of Education during the Board's April 20 meeting. ODE staff are available to support the District through this process. Please contact Susan Payne, Education Standards & Systems Specialist in the Office of Teaching Learning and Assessment at Susan.Payne@ode.oregon.gov or (503) 580-6814.

Sincerely,



Colt Gill, Director of Oregon Department of Education and,
Deputy Superintendent of Public Instruction



Eugene School District 4J
200 North Monroe Street
Eugene, OR 97402-4295
541-790-7700, www.4j.lane.edu

April 6, 2023

Deputy Superintendent of Public Instruction Colt Gill
Oregon Department of Education
255 Capitol Street NE
Salem, OR 97310-0203

Dear Director Gill,

As the superintendent of Eugene School District 4J, I am officially requesting that the Oregon State Board of Education temporarily waive the Prevention Education in Drugs and Alcohol (OAR 581-022-2045) and Human Sexuality Education (OAR 581-022-2050). This request is specific to the current 2022-23 academic year.

Beginning in the 2018-19 school year, the Eugene School District 4J fell out of compliance with the identified standards and began a planning process towards compliance. Momentum towards compliance was impeded by the COVID-19 pandemic.

In February of 2020, the district reported to the Oregon Department of Education (ODE) the lack of compliance with the two standards along with a proposed plan of corrective action. At that time the district requested and received a one-year waiver of the standard while progress was made towards compliance.

Due to the ongoing impacts of the COVID-19 pandemic in November 2021, the district reported to ODE "implementing corrective action" for the two out of compliance standards as it continued to work towards complying with the important health standards. Understanding the unique and compounded challenges, the ODE granted an additional extension of the waiver to the 2022-23 school year.

I assumed the role of Superintendent for Eugene School District 4J in July 2022. I was not a part of previous conversations with ODE regarding this matter, and I was made aware of our non-compliance status by ODE staff in December of 2022. Knowing that the district was nearing completion on the required curriculum adoption, I believed our November 2022 assurances report was sufficient in articulating our progress toward implementing the corrective actions. Immediately upon realization that was not the case, I have worked with district leaders and ODE staff to ensure that the previous compliance plan is underway. I can assure the State Board of Education and ODE that the required standards will be met at the end of this academic year and our corrective actions will be complete and in place for the fall 2023 onset of the school year.

Upon my understanding of the district's inability to apply to the ODE for further extensions, my team and I have been in close communication with, and grateful for the guidance and support of the staff at ODE. The district is clear on the expectations of compliance with these important curriculum standards and does not approach this appeal to the State Board of Education for this final accommodation lightly.

It is the intention of the Eugene School District 4J to ensure curriculum is in place to meet the both OAR 581-022-2045 and OAR 581-022-2050 by the start of the 2023-24 academic year.

Thank you for your consideration,

J. Andy Dey, Ed.D, Superintendent
Eugene School District 4J

Secondary (grades 6-12) Health Adoption

Objectives: To adopt a comprehensive 6 - 12 health curriculum for implementation during the 2023-2024 school year. These curricular materials will include lessons on the ODE key health categories and subtopics and will be aligned with the Oregon Health Education Standards and Performance Indicators.

As the likelihood of finding a single curriculum that effectively teaches all 9 ODE Health Topics (Affirming Identities & Anti-Oppression; Wellness & Health Promotion; Alcohol, Tobacco, & Other Drug Use Prevention; Social, Emotional, & Mental Health; Healthy Relationships & Violence Prevention; Growth & Development; Sexual Health Promotion; Safety & First Aid; and Nutrition & Physical Activity) and is aligned to Oregon Health Standards and Performance Indicators is unlikely, the team will look to supplement instructional material as needed per recommendation of ODE. [ODE Guidance on Supplemental](#)

Context: Currently, Eugene 4J secondary Health teachers have outdated Health curriculum which does not address all Oregon Health Standards, Performance Indicators, ODE key topics, or meet all OARs, ORS, SBs, and HBs that apply to health education. This has led to these teachers creating their own curricula, seeking online curricula, and borrowing from each other. This process does not provide a comprehensive health education program for Eugene 4J students districtwide.

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During the 2021-2023 school year, an elementary (K-5) comprehensive Health curriculum was adopted and implemented in 2022-2023, leading Eugene 4J School District toward quality health education and health literacy. Now is the time to continue this momentum and provide quality, comprehensive health education for all Eugene 4J K-12 students.

DRAFT Vision: To meet the board goal of every student in every school having equitable access and opportunity to succeed by evaluating inequities that exist among schools around Health Education and providing a comprehensive Health Education that meets the needs of each student. When students are empowered with Health Literacy (the degree to which individuals have the ability to find, understand, and use information services to inform health-related decisions and actions for themselves and others *CDC 2020) through a high quality Health education, all dimensions of their health improves. Healthy students are better learners, and academic achievement bears a lifetime of benefits for health. *CDC

Adoption & Pilot Teams: Two teams will be formed: one middle school adoption/pilot teams and one high school adoption/pilot team. Each team will be composed of secondary Health/PE teachers from all four regions of the Eugene 4J school district. In addition to classroom teachers, SPED, ELD, Equity Department Representative, Counselor, TOSAs, and building principal representatives will be asked to participate. Each anticipated team size is 5 - 10 representatives.

Building administrators will be encouraged to solicit interest from teaching staff so that representation on the team is balanced not only across the district, but also such that we have representation from historically underrepresented populations: BIPOC teachers, teachers who identify with the LGBTQ community, bilingual teachers, as well as educators who have a lens for Special Education (UDL) needs. Classroom teachers interested in the adoption process will also be part of the piloting team. Here is our team:

Lead Process Facilitator: Tom Horn

Lead TOSA: Secondary Health TOSA - Tina Fisher

MS Adoption Team:

Churchill Region Health Teacher - Katrina Burkhardt

North Region Health Teacher - Britten Kimbell

South Region Health Teacher - Alicia Chamness

Sheldon Region Health Teacher - Anna Wellman

Counselor - Stephanie Baxter

LA Teacher - Liz Nordling

Middle School Administrator - Sun Saeteurn

HS Adoption Team:

Churchill Region Health Teacher - Gabriel Lemay

North Region Health Teacher - Anzu McMullen

South Region Health Teacher - Jenn Garland-Warren

Global Health Teacher - Lisa Joye (South, Sheldon, Churchill)

Counselor - Mandy Brookshear

High School Admin - Missy Cole (Churchill)

Serving Both Teams:

Elementary Health TOSA - Jocelyn Mendelsshon

Assistive Technology (SSD) - Kelley Wilson

Technology - Nicholas Hadley

Prevention Services - Kerry Frazee

Lane ESD - Daniel Gallo

Eugene 4J ARs

Phase	Month	Description of Task	Notes
<p>Launch</p> <p><i>Superintendent will initiate the adoption process.</i></p>	<p>March 2023</p> <p>April 2023</p>	<p><i>(1a) The Superintendent will initiate the process; any teacher, group of teachers or administrator may recommend that this process be initiated. The Superintendent or designee will convene a team of teachers and admin. The team must include members with curricular expertise and contain sufficient representation of affected teachers and student populations.</i></p> <ul style="list-style-type: none"> ● Content TOSA will begin to pull a collection of resources for consideration for rubrics, professional learning resources, 4J and ODE criterias and guidance. ● Content TOSA will begin creating a budget for approval. <ul style="list-style-type: none"> ○ Budget Link ● Content TOSA will begin creating a list of curricula to examine. <ul style="list-style-type: none"> ○ Publishers will provide presentations upon request. <ul style="list-style-type: none"> ■ Provide a review sheet for each team member to take notes. ○ Middle School Approved by ODE <ul style="list-style-type: none"> ■ The Children’s Health Market - <i>The Great Body Shop</i> (6th grade in elementary curricula, 7 & 8 different) Barbara@TheGreatBodyShop.net ■ McGraw-Hill - <i>Teen Health</i> (6-8 text) Brian.Drulinier@mheducation.com ○ High School Approved by ODE <ul style="list-style-type: none"> ■ ETR - <i>HealthSmart High School</i> erinm@etr.org ■ Goodheart-Wilcox - <i>Comprehensive Health</i> wwarren@g-w.com tthompson@g-w.com ■ Human Kinetics - <i>Health for Life</i> aprils@hkusa.com ■ McGraw-Hill - <i>Glencoe Health</i> Brian.Drulinier@mheducation.com ■ SAVVAS - <i>SAVVAS Health</i> sheila.ellis@savvas.com 	<p>3/9/23 - Superintendent, Dr. Dey initiated the adoption process via email to Tom Horn.</p> <p>2/3/23 - Met with Suzanne Hidde (Health & PE Specialist with ODE) to discuss resources, requirements, and curricula. She will provide standards and legislative training for MS & HS separate or together.</p> <p>1/31/23 - Met with Ron Beick from finance to discuss Bond budget information. Currently we have \$202,693 for Health curriculum and \$15,000 for payroll for adoption work. *Plan to meet with IC to determine if additional funds will be provided.</p> <p>1/31/2023 - Curricula samples have been ordered. All publishers offer online access as well as hard copies of textbooks. We will be viewing both.</p> <p>4/5 -The MS Health Adoption team met to evaluate both ODE approved MS health curricula. Presentations were given by both publishers with time for questions. Team members used the team created 4J Health Curriculum Evaluation Tool to evaluate both curricula using online access, textbooks, and the presentation. The LMS Manager attended the presentations to evaluate integration with Canvas. We also reviewed the Assistive Technology Review document.</p> <p>4/6 - The HS Adoption team met with the purpose of narrowing the 5 ODE approved HS health curricula to 2. Presentations were given by 4 of the 5 publishers. One publisher (McGraw-Hill) provided a pre-recorded presentation. Team members used the</p>

<p style="text-align: center;">Evaluate</p> <p><i>A team is formed that receives training and elicits input and establishes a vision aligned with curriculum.</i></p>		<ul style="list-style-type: none"> ○ A small core HS team will be formed to reduce the option of 5 curricula to 2. <ul style="list-style-type: none"> ■ Due to the small number of respondents to join the HS team, we have only 1 HS adoption team. ● Build background learning for the adoption team. <ul style="list-style-type: none"> ○ ODE will provide Standards Training via Suzanne Hidde (Health & PE Specialist) & Sasha Greiner (Sexuality Education Specialist) <ul style="list-style-type: none"> ■ Standards Overview Presentation from 3/22 presented to the entire Health Adoption Team. ○ Create a presentation for Resource Training (OR-IMET, HECAT, NYU CR). 1st Adoption Team Meeting (All teams) ○ Knowledge building presentation created using SHAPE guidance documents. 1st Adoption Team Meeting (All teams) ○ Meet with Equity Managers to discuss equity in Health Education. <ul style="list-style-type: none"> ■ Several requests were made to the Equity Department, but no responses were received. 	<p>Curriculum Narrowing Rubric (which was created from the team's Vision Work) to examine all 5 curricula using online access, textbooks, and the presentations. The LMS Manager attended the presentations to evaluate integration with Canvas. We also reviewed the Assistive Technology Review document. (We are awaiting the Human Kinetics review as there was miscommunication about the login information.) Rubrics were collected and scores for each curriculum was averaged. The team debriefed the results and agreed on the outcome of the final 2 for further evaluation with the 4J Health Curriculum Evaluation Tool : LiveWell by Human Kinetics and HealthSmart by ETR.</p> <p>3/22/2023 - All team members met for background knowledge building from SHAPE documents. A presentation was given by ODE on Oregon Health and National Sexual Education standards and statutory and administrative rules. The team looked through the HECAT, NYU Culturally Responsive Scorecard, OR-IMET, and SHAPE documents to create an evaluation tool</p>
	<p>March 2023</p>	<p><i>(1a) Content TOSA will convene a team of teachers and administrators. The team must include members with curricula expertise and contain sufficient representation of affected teachers and student populations.</i></p> <ul style="list-style-type: none"> ● Meet with the HS Director to discuss the future of HS Health programs. ● Email health teachers/admin to solicit team members. ● Create a team roster to determine what stakeholders are represented. <ul style="list-style-type: none"> ○ The secondary health teacher pool is small and our team reflects that. Our MS team consists of 4 MS Health Teachers, a MS counselor, a MS language arts teacher, and a MS Principal. Our HS team consists of 3 HS Health teachers, 1 Global Health teacher, 1 COSA, and a HS Principal. We also have 2 Health TOSAs, an LMS Manager, an Assistive Tech Specialist, a SSD/Instruction Administrator, a Prevention Services Administrator, and a Lane ESD representative serving both teams. 	<p>3/9 - Sent soliciting email to all secondary health teachers, MS & HS Principals, Counselor representatives, Equity representatives, SPED representatives, school nurse representatives, technology representatives, and PE representatives. Additional emails were sent individually to seek more diversity.</p> <p>3/14 - Team is solidified and an email was sent out to all team members and their administrators to communicate dates and times for upcoming meetings.</p>

		<ul style="list-style-type: none"> ○ While our team make-up has a high percentage of white, cisgender female, and straight participants (which emulates the dynamics of the districts' Secondary Health teachers), we have representation for Asian, mixed race, Native American, male, and LGBTQ+. ● Solidify the adoption team and communicate dates and times for meetings/PD. <ul style="list-style-type: none"> ○ Adoption Calendar Draft ○ Adoption Timeline At A Glance 	<p>3/22/2023 - Team members took an Equity Lens Survey to determine the make-up of our team.</p>
<p>March 2023</p> <p>April 2023</p>	<p><i>(1b) The team will establish selection criteria and use the selection criteria to examine materials.</i></p> <ul style="list-style-type: none"> ● Team begins working toward a shared vision. <ul style="list-style-type: none"> ○ Vision Work <ul style="list-style-type: none"> ■ Curriculum Narrowing Rubric ○ Health Literacy Definition ● Professional Learning Resources: <ul style="list-style-type: none"> ○ ODE Health Standards ○ National Sex Ed Standards ○ ODE HPE Reminder ○ 4J Equity Decision Making Tool ● In developing/selecting a high quality evaluation tool, the team will reference the following: <ul style="list-style-type: none"> ○ K-12 OR-IMET Health Ed ○ HECAT-2021 ○ NYU Culturally Responsive Curriculum Scorecard ○ SHAPE Appropriate Practices in School-Based Health Ed ○ 4J Technology Compatibility ○ UDL Components <ul style="list-style-type: none"> ■ Assistive Tech ○ 4J Confidence Rating 	<p>3/22 - Both MS and HS teams met together to create our shared vision, curriculum evaluation tool, and health literacy definition. We used our Vision work to create a Curriculum Narrowing Rubric for the HS team work of narrowing 5 ODE approved curricula to 2 curricula. We used the 4J Equity Decision Making Tool to guide our work through evaluating our professional learning resources in order to create our own evaluation tool.</p> <p>2/1/2023 - Met with Justin Huntly (Tech Admin) regarding compatibility. He suggested looking for digital that integrates with Canvas. If it is web-based, there will be no forms to sign. If the company needs to talk to our system, then we need to complete forms regarding privacy. Device compatibility should not be an issue. Invite Justin or Nicholas Hadley to any meeting with publishers to help with compatibility questions.</p>	
<p>April 2023</p>	<p><i>(1c) The team will inform and receive input from affected parents, teachers, and administrators.</i></p> <ul style="list-style-type: none"> ● The team has been designed to include a wide range of voices, opinions, and backgrounds. Team members can also support as conduits from building or department desires or needs for curriculum. ● Use Pilot Journals for teacher input. ● Create a community presentation to present via a webinar and provide a survey for parent/community feedback. 		

	April 2023	<p><i>(1d) The team will report progress to the instructional team and receive feedback.</i></p> <ul style="list-style-type: none"> Once the process is completed, set up a date to present to the ILT team and receive feedback. 	
<p>Pilot</p> <p><i>Materials are piloted and examined using established criteria and data collected.</i></p>	April 2023 May 2023	<p><i>(2a) The team will review available curricula and develop a list of materials to consider. Selected materials will be evaluated using the evaluation rubric including the district's equity tool.</i></p> <ul style="list-style-type: none"> Health is non-core. We are not required to pilot, but will pilot 2 lessons per curriculum. 	
		<p><i>(b) Pilot teachers will receive professional development prior to piloting. The pilot team will evaluate units from the recommended curricula. All members of the pilot team will pilot more than one curriculum. The adoption team may observe pilot classrooms.</i></p> <ul style="list-style-type: none"> Curriculum Publisher presentations held in preparation for the pilot. The team, along with recommendations from publishers, will determine which lessons to pilot. Pilot teachers evaluate curricula, using standardized rubrics. Teachers each teach two lessons per the two curricula and are provided extended contract for the additional time accrued by piloting. The team will create a confidence scoring rubric to measure piloted lessons. Curriculum Administrator, TOSA team, and adoption team members will be provided time to observe pilot material in action. 	297
		<p><i>(c) The adoption team will collect data from the pilot team and will inform and receive input from parents, teachers and administrators.</i></p> <ul style="list-style-type: none"> Piloting teachers will keep rolling journals with notes and evidence of criteria. At the end of each pilot, and again after both, pilot teachers give a confidence rating based on the two curricula. Lead adoption team collaborates with the Special Ed department to look at materials in regards to access for all. A family survey will be issued to students experiencing piloted lessons. 	
Report	June 2023	<p><i>(3a) The team will make a recommendation to the instructional leadership team recommending the selection of materials for districtwide</i></p>	

<p><i>Data is evaluated, materials are ranked and a report is submitted.</i></p>		<p>use.</p> <ul style="list-style-type: none"> • The team will utilize a consensus protocol to determine the final recommendation for adoption. • The team will create a presentation to present recommendations to ILT. 	
		<p>(3b) Depending on the scope and impact of the decision, the instructional advisory council may review the findings, ensure the adoption process and provide feedback to the instructional leadership team.</p> <p>(3c) The instructional leadership team will make a recommendation to the superintendent.</p> <ul style="list-style-type: none"> • The goal is to have a decision by the end of May in order to purchase materials in a time frame that allows for timely shipping and distribution, as well as quality PD for Health teachers. 	
<p>Adopt</p> <p><i>The superintendent makes an adoption decision.</i></p>	<p>June 2023</p>	<p>School board will receive a presentation on materials and provide input as well as update 581-022-2045 Prevention Ed in Drugs & Alcohol and 581-022-2050 Human Sexuality Education district-wide plans.</p> <p>The superintendent's decision is final, and once made such materials shall be considered adopted for districtwide use.</p>	
<p>Implement</p> <p><i>Schools implement the materials with PD and evaluation opportunities.</i></p>	<p>June 2023 - August 2023</p>	<p>(4a) The team will develop an implementation plan including PD for affected teachers and evaluation of materials.</p> <ul style="list-style-type: none"> • Delivery schedule • PD for new curriculum • Scope & Sequence • Feedback 	
	<p>September 2023</p>	<p>(4b) Affected teachers will begin using the adopted curriculum according to the implementation plan.</p>	
	<p>TBD</p>	<p>(4c) The instructional leadership team will assess strengths and areas</p>	

		for improvement, including equity impacts, to inform any needed supplementation to the current adoption as well as future adoption cycles and report to the superintendent.	
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<p>SUBJECT: OAR 581-022-2220</p> <p>STAFF NAME & OFFICE: Kati Moseley and Haedon Brunelle, Office of the Director</p> <p>Summarize the issue. Three to five sentences that explains the subject and the need for board attention—what’s the problem/concern/issue? If this is a rule, what is the change that needs to be made?</p> <p><input type="checkbox"/> New Rule <input checked="" type="checkbox"/> Amend Existing Rule <input type="checkbox"/> Repeal Rule</p>	<p><input checked="" type="checkbox"/> First Reading <input checked="" type="checkbox"/> Presentation <input type="checkbox"/> No Presentation</p> <p><input type="checkbox"/> Action <input type="checkbox"/> Temp Rule <input type="checkbox"/> Presentation <input type="checkbox"/> No Presentation</p>
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BACKGROUND

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

1. History:
 - a. What prompted the rule (why do we have it?) State law? Federal law? Incident? Why are changes/amendments being proposed?
 - i. The COVID-19 pandemic shed a light on pre-existing inequities and fragilities within Oregon’s health and education systems. COVID-19 illness and death disproportionately affected low-income, communities of color, people with disabilities, people who are medically fragile and complex, and rural communities. COVID-19 closed Oregon schools to in person learning. ODE has undertaken this updated to its health services rule (OAR 581-022-2220) to incorporate learning from the last three years of school operations during a pandemic. The proposed update would require district communication plans, an annual update to their health services plans, and clarify school related health requirements for medically fragile and complex students, and more.
 - ii. This rule addresses health services that school districts provide to students. This rule ensures that communicable diseases are mitigated in schools, school health statutes are in rule, nursing-to-student ratios are established, as well as first aid certified staff-to-student ratios are established.
 - iii. This rule has not been updated since 1996. This rule currently references outdated rules and statutes. This update reflects current OAR and statutes.
 - b. What is the current requirement in rule or statute?
 - i. The current rule requires school districts to maintain a prevention oriented health services program. This program must include
 1. Communicable disease control
 2. Isolation of ill students
 3. Integration of school health services such as vision screening
 4. Defines nurse staffing to student ratios requirements.
 - c. Why is this rule being brought forward right now?

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- i. This rule is being brought forward now to prepare for the 2023 – 2024 academic year. As we move away from COVID-19 specific management plans and return to the broader focus of communicable disease and management plans, it is a good moment to build on the operational learning and capacity of the last three years and codify update expectations for school related to health services and communicable disease management.
2. Purpose
 - a. What function does the current rule hold?
 - i. The current rule supports school health and safety for all students and staff.
 - ii. The current rule describes how school-related health services for students who requires these to access their public education should be provided.
 - b. How long has the rule been in place?
 - i. Since September 1, 1980
3. Does the board have any areas of discretion or is this strictly mirroring statute?
 - a. If the board does have discretion, those areas should be called out here or in the next section.
 - i. The board has discretion as pointed to by ORS 326.051, and may choose to not adopt this rule update.
4. Stakeholder voice/input (individual and collective i.e., groups)
 - a. Who was involved in bringing this to the Board?
 - i. Members of ODE's Office of the Director, including Director Colt Gill, Administrator for Health in Education Kati Moseley, Administrator Executive Support Haedon Brunelle
 - ii. Members of ODE's Office of Enhancing Student Opportunities, including Assistant Superintendent Tenneal Wetherell, School Medicaid and Health Specialist Ely Sanders, IDEA Programs Director Eric Wells, Operations and Policy Analyst Jennifer Dundon
 - b. What did engagement in this process entail?
 - i. ODE discussed this rule update several times with Oregon Health Authority Acute and Communicable Disease Prevention section staff, including the Medical Director, Respiratory Pathogens Director, and the State Public Health Officer of the Oregon Health Authority.
 - ii. The following groups were intentionally engaged for this rule update:
 1. Oregon School Nurses Association
 2. Select small, medium, large, and education service district superintendents
 3. Education Service District Communicable Disease Preparedness Liaisons
 4. Oregon School Boards Association
 5. Coalition of Oregon School Administrators
 6. Charter School leaders
 7. School Health Aides
 8. ODE Rules Advisory Committee
 - c. Who may be affected by this?
 - i. School district superintendents, and public charter school administrators, as well as principals, school nurses, and other school staff that will be assigned roles relating to communicable disease management.

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- ii. ODE’s Office of the Director and Office of Enhancing Student Opportunity.
- d. Whose voice is missing?
 - i. ODE did not host engagements with students or families.
- e. What additional information does the Board need prior to moving forward?
 - i. School districts currently have School-Level COVID-19 Management plans in place. The updates to the rule align with the content and expectations of these plans.

SUMMARY OF PREVIOUS BOARD ACTION

- 1. Has this been before the board before? If so, what action did the board take?
 - a. This OAR was last updated in 1996 besides a re-numbering in 2017.

HAS THE RULE CHANGED SINCE LAST BOARD MEETING?

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

POLICY ISSUE OR CONCERNS

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

- 1. Stakeholders
 - a. How have you intentionally involved stakeholders who are also members of communities affected by this rule?
 - i. The proposed update to the rule clarifies statutory obligations related to school nursing services. ODE engaged with several groups relating to this rule, including superintendents from small and medium district, charter school leaders, school nurses, and school health aides. These engagements surfaced concerns with staffing in relation to both the current and proposed rule compliance. Specifically, our partners were concerned that submitting a written plan to ODE, especially for districts that are struggling to hire nurses, would be a burden, or not having a nurse would make them out of compliance.
 - ii. ODE engaged with Education Service District Communicable Disease and Preparedness Liaison and Oregon Association of Education Service district leadership and program staff. These individuals offered suggestions for the kind of technical assistance that schools and districts will benefit from should the rule be adopted.
 - iii. ODE engaged with school nurses and school health aides who discussed concerns about how to ensure availability of isolation space in each school.

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Current rule requires students having communicable diseases needing to isolate, but no further language. School nurses and health aides named that requiring an isolation space in each school building will help address this concern. ESD and district superintendent groups named the issue of finding space in many of their school buildings to do so. To support compliance with expectations, the proposed rule language clarifies that schools have space that can be utilized for isolation of sick student when such space is needed.

- b. Who are the historically underserved groups affected?
 - i. ODE is committed to promoting educational systems that support each child's identity, health and well-being, beauty, and strengths. Equity is central to informing every decision. Implementation of this rule will require schools to apply an equity-informed, antiracist, and anti-oppressive framework to decision making to communicable disease planning. Planning will benefit from inclusion of the following groups, among others, in order to incorporate their expertise, lived experience, and wisdom.
 - 1. School and district-based administrators.
 - 2. Teachers, including specialists (special education, arts, technology, etc.);
 - 3. Other school staff including mental health and nursing staff, front office staff, nutrition services, transportation services, and custodial services; and
 - 4. Families and studentsStaff and school administrators, in partnership with school nurses or other school health providers, should work with interdisciplinary teams to continue to address individual student needs.
 - c. Has there been consultation or collaboration with tribes in this rule change or policy decision?
 - i. There has not been consultation or collaboration with tribes with this rule draft.
 - d. How has the Oregon Department of Education modified or enhanced the rule change or policy decision to address the needs of historically underserved communities?
 - i. The current health services rule creates a program framework to serve students who require health services to access their public education.
 - ii. The communicable disease component of the health services plan described in the rule update includes explicit planning and action to identify groups who are at higher risk of health or education impact from a communicable disease event, and proactively plan to mitigate those impacts.
2. Negative/Positive Effects
- a. What is the impact on the population most affected by this rule that the board should consider?
 - i. Students who have a right to health-related services in schools will be served by districts and schools who have clarity on expectations for staffing, delegation and access.
 - ii. Students and staff will attend schools that are prepared to operate during future communicable disease events with a intentional actions around equity, continuity and mental health.

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- b. What possible opportunities, assets or access could this rule provide?
 - i. This rule helps ensure robust school-level planning to mitigate diseases in coming school years.
 - ii. This rule supports the continued longer-term relationship between schools, their local public health authorities, and continued outbreak and disease-related communication to parents and families.
 - iii. This rule contributes to minimizing school disruptions due to communicable disease events.
 - iv. This rule clarifies statute and thus expectations related to school nursing service availability and delivery.
- c. What is the impact on eliminating the opportunity or achievement gap?
 - i. This rule contributes to school capacity to prevent, respond to and recover from a disease outbreak. When schools are open, and students, teachers and staff are healthy to attend, students flourish. When students must attend online learning or schools close due to a disease outbreak achievement gaps may be exacerbated.
- d. Have all the potential unintended consequences been considered?
 - i. We have considered all potential unintended consequences to the best of our ability to predict them.
- e. Does this rule advance the ESSA goals?
 - i. Yes. This rule supports in person learning, which supports ESSA goals by supporting full and quality providing of needed health services to access education, and by preventing school closures, classroom closures and staff and student absence due to illness.
 - ii. The health services plan that would be required by this rule helps build school and district operational capacity.
- 3. What are the barriers to more equitable outcomes, either:
 - a. State or federally mandated?
 - b. Political?
 - c. Emotional?
 - d. Financial?
 - e. Programmatic?
 - f. Language?
 - g. Geography?
 - a. Nursing and staffing availability in more rural portions of the state.
 - h. Size?
 - a. Staffing capabilities for smaller and some medium sized districts to address the planning needed to comply this updated OAR remains a concern. To address this, ODE continues to work with ESD communicable disease preparedness liaisons to develop a guide that speaks to each clause of the rule and how it relates to previous guidance. The goal is to ensure an efficient guidance drafting process for smaller and medium districts.

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EQUITY IMPACT ANALYSIS

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

1. How are historically underserved populations impacted by this docket item?
 - a. Demonstrate how the rule changes, policy, or action could produce other unintended consequences not listed in the docket.
 - b. Refer to *Policy Issue or Concerns* and identify the historically underserved populations affected. Conduct a reflection and examination, which will and should answer 1a.
 - i. This will answer both 1.a. and 1.b. By giving ODE the authority to determine the form of the plan, the rule allows ODE to guide health services planning in ways that center equity and sets districts up to consider health services (including communicable disease management) policy, operations, procedures, and protocols through a lens of equity.
2. Examine the impact of the rule changes, policy, or action on historically underserved populations in Oregon. Describe this ongoing and/or foreseeable impact, using as much detail as possible.
 - a. This rule may protect historically underserved populations in Oregon by decreasing the likelihood of becoming ill with or missing school due to a communicable disease.
3. Explain how the rule change, policy or action works toward improving achievement, opportunities and a sense of worthiness for underserved students?
 - a. The rule protects access to in person instruction.

FISCAL ANALYSIS

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

1. How does the proposed rule fit within the budget of the agency?
 - a. Which units/divisions/offices will be impacted and how?
2. How does the proposed rule change impact school districts and ESDs?
3. How does the proposed rule change impact schools and other educational institutions?
4. Does the proposed rule change impact other stakeholders?

EFFECT OF A "YES" OR "NO" VOTE

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

The consequences of the Board not approving the staff recommendation would mean a missed opportunity to build on best practices and learning from the pandemic to strengthen school operations. An additional consequence is that the rule would remain unclear on statutory expectations for nurse staffing, delegation and student: nurse ratios, putting districts at risk of being out of compliance with statutory expectations.

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STAFF RECOMMENDATION

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

ATTACHMENTS

Attachment 1: Draft Rules

Attachment 2: Presentation Slides

DIVISION 22
STANDARDS FOR PUBLIC ELEMENTARY AND SECONDARY SCHOOLS

581-022-2220

Health Services - Draft Update

(1) School districts, education service districts, and public charter schools shall develop, implement, and annually update a written prevention-oriented health services plan for all students. The plan must describe a health services program for all students at each facility that is owned or leased where students are present for regular programming. The health services plan will be created and maintained by the administration of each district and charter school serving students. Health services plans must include:

(a) Health care space that is appropriately supervised and adequately equipped for providing health care and administering medication or first aid.

(b) Communicable disease prevention and management plan that includes school-level protocols for:

(i) Notifying the local public health authority (LPHA) if absence due to illness threshold, as established by the Oregon Health Authority (OHA) or LPHA, of students and staff is attained.

(ii) Exclusion of individuals consistent with OAR 333-019-0010, with a description of an isolation space that is appropriately supervised and adequately equipped and that can be used exclusively for the supervision and care of a sick child when a sick child is present in the school.

(iii) Implementing mitigation measures if cases warrant or if recommended by the Oregon Health Authority or LPHA.

(iv) Identifying, understanding and responding to the needs of students who are more likely to have severe disease outcomes or loss of access to education due to a communicable disease, and responding to those needs.

(v) Responding to the mental health impacts of a communicable disease outbreak in the school.

(vi) Ensuring continuity of education for students who may miss school due to illness.

(c) A district-to-school communication plan that includes a:

(i) Point of contact to facilitate communication, maintain healthy operations, and respond to communicable disease questions from schools, state or local public health authorities, state or local regulatory agencies, students, families and staff;

(ii) Protocol to provide all staff and families with contact information for the point of contact; and

(iii) Process to notify as soon as possible all families and other individuals if there has been a case of a restrictable disease as defined by OAR 333-019-0010 on the premises if advised by an LPHA or the OHA.

(d) Health screening information, including required immunizations and TB certificates, when required by ORS 433.260 and 431.110 and OAR 333-019-0010.

(e) Services for all students, including those who are medically complex, medically fragile or nursing dependent, and those who have approved 504 plans, individual education program plans, and individualized health care plans or special health care needs as required by ORS 336.201, 339.869, OAR 581-021-0037, 581-015-2040, 581-015-2045, and 851-045-0040 to 0060;. and 851-047-0010 to 0030.

(f) Integration of school health services with school health education programs and coordination with health and social service agencies, public and private.

(g) Hearing screening; and vision and dental screening as required by ORS 336.211 and 336.213.

(h) Process to assess and determine a student's health services needs, including availability of a nurse to assess student nursing needs upon, during, and following enrollment with one or more new medical diagnose(s) impacting a student's access to education, and implement the student's individual health plan prior to attending as per 336.201.

(i) Compliance with OR-OSHA Bloodborne Pathogens Standards for all persons who are assigned to job tasks which may put them at risk for exposure to body fluids per OAR 437-002-0360.

(k) Policy and procedures for medications, as per ORS 339.866 to 339.874 and OAR 581-021-0037.

(j) Guidelines for the management of students who are medically complex, medically fragile, or nursing dependent as defined by ORS 336.201, including students with life-threatening food allergies and adrenal insufficiency while the student is in school, at a school-sponsored activity, under the supervision of school personnel, in before-school or after-school care programs on school-owned property, and in transit to or from school or school-sponsored activities. The guidelines must include:

(i) Standards for the education and training of school personnel to manage students with life threatening allergies or adrenal insufficiency;

(ii) Procedures for responding to life-threatening medical conditions including allergic reactions or adrenal crisis;

(iii) A process for the development of an individualized health care plan for every medically complex, medically fragile, nursing dependent student, including students with a known life-threatening allergy and an individualized health care plan for every student for whom the school district has been given proper notice of a diagnosis of adrenal insufficiency per OAR 581-021-0037;

(iv) Protocols for preventing exposures to allergens; and

(v) A process for determining if or when a student may self-carry prescription medication when the student has not been approved to self-administer medication as allowed by 581-021-0037.

(2) School districts, education service districts, and charter schools shall ensure that nurses who provide health services to students are licensed to practice nursing by the Oregon State Board of Nursing (OSBN):

(a) School districts, education service districts, and charter schools may employ Licensed Practical Nurses (LPN) in alignment with LPN supervision requirements of OAR 851-045-0050 to 0060.

(b) Job descriptions and nursing delegation considerations shall reflect assignments complying with the Oregon State Board of Nursing Scope of Practice Administrative Rules for all levels of

licensed providers, including standards for the evaluation and assessment of students, provision of services, medication administration, supervision of unlicensed staff and documentation of services provided per Division 47.

(c) School districts, education service districts, and charter schools that employ Registered Nurses who are not certified by the Teacher Standards and Practices Commission as school nurses, shall not designate such personnel as "school nurse" by job title.

(3) Each school shall have, at a minimum, at least one staff member with a current first aid/CPR/AED card for every 60 students enrolled, as set by ORS 339.345, and 342.664 and who are trained annually on the district and building emergency plans. Emergency planning will include the presence of at least one staff member with a current first aid/CPR/AED card for every 60 students for school-sponsored activities where students are present.

(4) Schools that contract or pay for health services must ensure services are comprehensive, medically accurate, and inclusive as defined by OAR 581-022-2050.

(5) Each school building must have a written plan for response to medical emergencies; such plan should be articulated with general emergency plans for buildings and districts as required by OAR 581-022-2225.

Statutory/Other Authority: ORS 326.051

Statutes/Other Implemented: ORS 326.051



Updates to ODE's Health Services Rule

Kati Moseley, Haedon Brunelle, Ely Sanders
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Updates to ODE's Health Services Rule

Subject: Modernizing and updating [OAR 581-022-2220](#) - the Division 22 Health Services Rule

Concept: Updating requirements for Health Services plans and programming for school districts and public charter schools. This rule includes requirements for communicable disease planning for schools.

Background: [OAR 581-022-2220](#) was established in 1980, and requires school districts to have Health Services plans. The last update to this rule was in 1996. The rule includes communicable disease management plans, vision requirements, nursing staff to student ratios, isolation of ill students, first-aid trained staff-to-student ratio requirements, and more.

This proposed update maintains these state standards, adds clarity to requirements related to nursing and delegation, incorporates lessons learned during the pandemic, aligns expectations for health services with those for health education, and updates rules and statutes referenced.

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Proposed Update: Section 1 - 1.a.

(1) School districts, education service districts, and public charter schools shall develop, implement, and annually update a written prevention-oriented health services plan for all students. The plan must describe a health services program for all students at each facility that is owned or leased where students are present for regular programming. The health services plan will be created and maintained by the administration of each district and charter school serving students. Health services plans must include:

(a) Health care space that is appropriately supervised and adequately equipped for providing health care and administering medication or first aid.

Proposed Update: Section 1.b.

(b) Communicable disease prevention and management plan that includes school-level protocols for:

(i) Notifying the local public health authority (LPHA) if absence due to illness threshold, as established by the Oregon Health Authority (OHA) or LPHA, of students and staff is attained.

(ii) Exclusion of individuals consistent with OAR 333-019-0010, with a description of an isolation space that is appropriately supervised and adequately equipped and that can be used exclusively for the supervision and care of a sick child when a sick child is present in the school. 314

(iii) To implement mitigation measures if cases warrant or if recommended by the Oregon Health Authority or LPHA.

(iv) For identifying, understanding and responding to the needs of students who are more likely to have severe disease outcomes or loss of access to education due to a communicable disease, and responding to those needs.

(v) For responding to the mental health impacts of a communicable disease outbreak in the school.

(vi) To ensure continuity of education for students who may miss school due to illness.

Proposed Update: Section 1.c.

(c) A district-to-school communication plan that includes:

(i) A point of contact to facilitate communication, maintain healthy operations, and respond to communicable disease questions from schools, state or local public health authorities, state or local regulatory agencies, students, families and staff;

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(ii) Protocol to provide all staff and families with contact information for the point of contact; and

(iii) A process to notify as soon as possible all families and other individuals if there has been a case of a restrictable disease as defined by OAR 333-019-0010 on the premises if advised by an LPHA or the OHA.

Proposed Update: Section 1.d - 1.h.

(d) Health screening information, including required immunizations and TB certificates, when required by ORS 433.260 and 431.110 and OAR 333-019-0010.

(e) Services for all students, including those who are medically complex, medically fragile or nursing dependent, and those who have approved 504 plans, individual education program plans, and individualized health care plans or special health care needs as required by ORS 336.201, 339.869, OAR 581-021-0037, 581-015-2040, 581-015-2045, and 851-045-0040 to 0060;. and 851-047-0010 to 0030.

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(f) Integration of school health services with school health education programs and coordination with health and social service agencies, public and private.

(g) Hearing screening; and vision and dental screening as required by ORS 336.211 and 336.213.

(h) Process to assess and determine a student's health services needs, including availability of a nurse to assess student nursing needs upon, during, and following enrollment with one or more new medical diagnose(s) impacting a student's access to education, and implement the student's individual health plan prior to attending as per 336.201.

Proposed Update: Section 1.i - 1.k.

- (i) Compliance with OR-OSHA Bloodborne Pathogens Standards for all persons who are assigned to job tasks which may put them at risk for exposure to body fluids per OAR 437-002-0360.
- (k) Policy and procedures for medications, as per ORS 339.866 to 339.874 and OAR 581-021-0037.

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Proposed Update: Section 1.j.

(j) Guidelines for the management of students who are medically complex, medically fragile, or nursing dependent as defined in ORS 336.201 including students with life-threatening food allergies and adrenal insufficiency while the student is in school, at a school-sponsored activity, under the supervision of school personnel, in before-school or after-school care programs on school-owned property, and in transit to or from school or school-sponsored activities. The guidelines must include:

- (i) Standards for the education and training of school personnel to manage students with life threatening allergies or adrenal insufficiency;
- (ii) Procedures for responding to life-threatening medical conditions including allergic reactions or adrenal crisis;
- (iii) A process for the development of an individualized health care plan for every medically complex, medically fragile, nursing dependent student, including students with a known life-threatening allergy and an individualized health care plan for every student for whom the school district has been given proper notice of a diagnosis of adrenal insufficiency per OAR 581-021-0037;
- (iv) Protocols for preventing exposures to allergens; and
- (v) A process for determining if or when a student may self-carry prescription medication when the student has not been approved to self-administer medication as allowed by 581-021-0037.

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Proposed Update: Section 2

(2) School districts, education service districts, and charter schools shall ensure that nurses who provide health services to students are licensed to practice nursing by the Oregon State Board of Nursing (OSBN):

(a) School districts, education service districts, and charter schools may employ Licensed Practical Nurses (LPN) in alignment with LPN supervision requirements of OAR 851-045-0050 to 0060.

(b) Job descriptions and nursing delegation considerations shall reflect assignments complying with the Oregon State Board of Nursing Scope of Practice Administrative Rules for all levels of licensed providers, including standards for the evaluation and assessment of students, provision of services, medication administration, supervision of unlicensed staff and documentation of services provided per Division 47.

(c) School districts, education service districts, and charter schools, that employ Registered Nurses who are not certified by the Teacher Standards and Practices Commission as school nurses, shall not designate such personnel as "school nurse" by job title.

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Proposed Update: Section 3

(3) Each school shall have, at a minimum, at least one staff member with a current first aid/CPR/AED card for every 60 students enrolled, as set by ORS 339.345, and 342.664 and who are trained annually on the district and building emergency plans. Emergency planning will include the presence of at least one staff member with a current first aid/CPR/AED card for every 60 students for school-sponsored activities where students are present.

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Proposed Update: Sections 4 and 5

(4) Schools that contract or pay for health services must ensure services are comprehensive, medically accurate, and inclusive as defined by OAR 581-022-2050.

(5) Each school building must have a written plan for response to medical emergencies; such plan should be articulated with general emergency plans for buildings and districts as required by OAR 581-022-2225.

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Timeline of Engagements

- Prior engagements:
 - Partnered with the Office of Enhancing Student Opportunities
 - Oregon Health Authority, October 2022
 - Superintendents of Small, Medium, Large Districts, Education Service Districts, November 2022
 - School District Health Aides, November 2022
 - Charter School leaders, December 2022
 - Oregon School Nurses Association members, December 2022
 - Oregon School Employees Association and the Oregon Education Association, January 2023
 - Coalition of Superintendents Association and the Oregon School Board Association, February 2023
- Where we are in the process of rulemaking?
 - Collecting feedback and answering questions from the SBE today
 - 2nd RAC reading, May 4th
 - 2nd reading for the State Board of Education, June 15th

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Rule Update Impacts: Health Services Rule

Racial Equity:

- The communicable disease plan portion of this rule includes planning for communities that we reasonable know will experience greater burden of a communicable disease event.

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Fiscal/Small Business Impact:

- Fulfills requirements under ESSER III for schools to continue to use ESSER III funds for the 2023 - 2024 academic year

Thank you. Questions?

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Oregon State Board of Education

April 20, 2023

AGENDA ITEM: 7.A.

<p>SUBJECT: Sauvie Island School Charter School Waiver Request</p> <p>STAFF NAME & OFFICE: Kate Pattison & Emily Nazarov, Government and Legal Affairs, Director’s Office; Darla Meeuwsen, Sauvie Island School</p> <p>Sauvie Island School (SIS) is requesting a waiver of ORS 338.125(3) to allow the school to continue the priority admission of children of SIS staff members.</p>	<p><input checked="" type="checkbox"/> First Reading</p> <p><input checked="" type="checkbox"/> Presentation</p> <p><input type="checkbox"/> No Presentation</p> <p><input type="checkbox"/> Action</p> <p><input type="checkbox"/> Temp Rule</p> <p><input type="checkbox"/> Presentation</p> <p><input type="checkbox"/> No Presentation</p>
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BACKGROUND

Public Charter School Waivers

The State Board of Education has been granted the authority to waive certain provisions of the Public Charter School Statutes in [ORS Chapter 338](#). The standards and process for requesting a waiver of ORS 338 have been set forth in [OAR 581-026-0130](#) and the 2020 Process to Request a Charter School Waiver.

ORS 338.025 Rules; waiver of provisions of chapter; exceptions.

- (1) The State Board of Education may adopt any rules necessary for the implementation of this chapter. The rules shall follow the intent of this chapter.
- (2) Upon application by a public charter school, the State Board of Education may grant a waiver of any provision of this chapter if the waiver promotes the development of programs by providers, enhances the equitable access by underserved families to the public education of their choice, extends the equitable access to public support by all students or permits high quality programs of unusual cost. The State Board of Education may not waive any appeal provision in this chapter or any provision under ORS 338.115 (1)(a) to (aa), 338.120, 338.125 (4), 338.135 (2)(b) or 339.122.

OAR 581-026-0130: Procedure to Waive Certain Provisions of the Charter School Law

- (1) A public charter school may petition the State Board of Education for a waiver of any provision of ORS 388. The written petition must specify the reason(s) the charter school is seeking the waiver and any other relevant information.
- (2) The public charter school must notify the sponsor if a waiver under this section is being considered. Waivers granted by the State Board to a charter school may require amending the charter under the provisions of OAR 581-026-0100 (7).
- (3) The State Board of Education, upon receipt of a waiver petition, will review the petition and may grant the waiver upon a showing that approving the waiver would:
 - (a) Promote the development of programs by providers;
 - (b) Enhance the equitable access by underserved families to the public education of their choice;
 - (c) Extend the equitable access to public support by all students; or
 - (d) Permit the development of high quality programs of unusual cost.
- (4) The State Board of Education may not waive any review provision under the Act or any provision under ORS 338.115(1).

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ODE Staff Analysis of Waiver Request

The charter school is requesting to waive ORS 338.125(3), which includes the requirement that students who apply to the charter school must be selected through a lottery if the number of applicants exceed the charter school's capacity. This statute allows a public charter school to give priority enrollment to students who reside in the attendance boundary of a converted school public school, students who were enrolled in the prior year, siblings of current students, students who are at risk because of economic or academic disadvantage, or if the charter school is part of a cooperative agreement.

If granted, the charter school will be allowed to continue offering priority enrollment for students of staff members. Currently, SIS is offering priority in the following order:

1. Students who were enrolled in the school in the prior school year.*
2. Siblings of current students who are in 7th grade and younger during the application window.*
3. Sauvie Island residents.*
4. Children of SIS staff (allowable via state waiver)
5. Residents in the Scappoose SD*
6. Residents outside the Scappoose SD*

*Admission priorities allowable via ORS 338.125

According to the school, all staff members with children enrolled in the school have become employed after their children were enrolled through the lottery process. Further, Sauvie Island residents are prioritized above the children of staff members in the school's standard lottery process that will continue even if the waiver is approved. As described in the waiver request, this practice "ensures that all children of migrant families on Sauvie Island have high admission priority as island residents. In addition, no underserved populations from Sauvie Island have been denied admission or placed on the waitlist due to the placement of a staff member's child. Rather, it is a helpful retention tool and supports long-term investment in the school."

The school must still comply with all other subsections of ORS 338.125.

338.125 Student enrollment; nonresident students; appeals; written notices. (1) Student enrollment in a public charter school is voluntary.

(2)(a) All students who reside in the school district in which the public charter school is located are eligible for enrollment in the public charter school if space is available.

(b) Students who do not reside in the school district in which the public charter school is located are eligible for enrollment in the public charter school if space is available and subject to subsection (4) of this section.

(c) A public charter school may not limit student enrollment based on race, religion, sex, sexual orientation, gender identity, ethnicity, national origin, disability, the terms of an individualized education program, income level, proficiency in the English language or athletic ability. A public charter school may implement a weighted lottery that favors historically underserved students as provided by subsection (3)(a) of this section.

(3)(a) Except as provided by paragraphs (b) and (c) of this subsection, if the number of applications from students exceeds the capacity of a program, class, grade level or building, the public charter school

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shall select students through an equitable lottery selection process. For the purpose of ameliorating the impact of discrimination against historically underserved students, an equitable lottery selection process may include weights that favor historically underserved students. As used in this paragraph, “historically underserved students” are students who are at risk because of any combination of their race, sex, sexual orientation, gender identity, ethnicity, disability, income level, proficiency in the English language, socioeconomic status or geographic location.

(b)(A) A public charter school may give priority for admission to students who reside within the attendance boundaries that were in effect at the time a school district closed a nonchartered public school if:

(i) The public charter school began to operate not more than two years after the nonchartered public school was closed;

(ii) The school district that closed the nonchartered public school is the sponsor of the public charter school;

(iii) The public charter school is physically located within the attendance boundaries of the closed nonchartered public school; and

(iv) The school district board, through board action, approved the public charter school giving priority as described in this paragraph.

(B) Nothing in this paragraph requires an amendment to a charter. A school district board may take an action described in subparagraph (A)(iv) of this paragraph at any time during the term of a charter.

(c) After a public charter school has been in operation for one or more years, the public charter school may give priority for admission to students who:

(A) Were enrolled in the prior year in the public charter school;

(B) Were enrolled in a public preschool or prekindergarten program operated by the public charter school;

(C) Have siblings who are presently enrolled in the school and who were enrolled in the school in the prior year;

(D) Are at risk because the student has an economic or academic disadvantage that requires special services or assistance, including students who:

(i) Are from economically disadvantaged families;

(ii) Are identified as having special educational needs;

(iii) Are limited in proficiency in the English language;

(iv) Are at risk of dropping out of high school; or

(v) Do not meet minimum standards of academic proficiency; or

(E) If the public charter school is a party to a cooperative agreement described in ORS 338.080, reside in the school district that is the sponsor of the public charter school or in a school district that is a party to the cooperative agreement.

SUMMARY OF PREVIOUS BOARD ACTION

The State Board of Education has previously approved two waivers for Sauvie Island School:

1. 2012 – Priority Enrollment for children within a geographic boundary and children of staff
2. 2017 – Priority Enrollment for children who live on the island and children of staff

POLICY ISSUES OR CONCERNS

The State Board typically grants waivers for the duration of the charter school contract. Sauvie Island School’s current contract expires on June 30, 2027.

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EQUITY IMPACT ANALYSIS

See the application narrative and attachments provided by the requestor.

FISCAL ANALYSIS

There is no fiscal impact on the Department or the State Board of Education.

EFFECT OF A "YES" OR "NO" VOTE

Yes = If the Board grants the waiver as requested, Sauvie Island School will be allowed to continue offering priority enrollment to children of staff through the remainder of their current contract.

No = Sauvie Island School will not be allowed to offer priority enrollment to children of staff and will be required to comply with ORS 338.125.

ATTACHMENTS

Attachment 1: Sauvie Island School Public Charter School Waiver Request

Attachment 2: Sauvie Island School Demographics

Attachment 3: Sauvie Island School District Letter

Attachment 4: 2021-22 Sauvie Island School At-A-Glance

Attachment 5: 2021-22 Sauvie Island School Accountability Details

2021-22 ESSA Accountability Details Report

Public Version - October 20, 2022

District: Scappoose SD 1J

School: Sauvie Island School

The Accountability Details Report displays the data for indicators used by the accountability system to identify schools for comprehensive or targeted supports as required by Oregon's State Plan under the Every Student Succeeds Act (ESSA). The accountability system uses six indicators for elementary and middle schools. For more information about the included indicators and their definitions and calculations, please refer to the [Accountability Details Policy and Technical Manual](#). For more information on the transition of school identification from year-to-year please see the [School Improvement webpage](#).

Indicator Ratings Table

Student Group	ESSA Supports	ELA Achievement	ELA Change	Math Achievement	Math Change	Regular Attenders	On Track to ELP
All Students	Not Identified	Level 4	Level 2	Level 3	Level 3	Level 3	Not Rated
Economically Disadvantaged	Not Identified	Level 3	Level 5	Level 3	Level 5	Level 2	
English Learners	Not Identified	Not Rated	Not Rated	Not Rated	Not Rated	Not Rated	Not Rated
Students with Disabilities	Not Identified	Level 2	Level 2	Level 2	Level 3	Level 4	
Underserved Race/Ethnicity	Not Applicable	Not Applicable	Not Applicable	Not Applicable	Not Applicable	Not Applicable	
American Indian/Alaska Native	Not Identified	Not Rated	Not Rated	Not Rated	Not Rated	Not Rated	
Native Hawaiian/Pacific Islander	Not Identified	Not Rated	Not Rated	Not Rated	Not Rated	Not Rated	
Black/African American	Not Identified	Not Rated	Not Rated	Not Rated	Not Rated	Not Rated	
Hispanic/Latino	Not Identified	Level 3	Not Rated	Level 2	Not Rated	Level 2	
Asian	Not Identified	Not Rated	Not Rated	Not Rated	Not Rated	Not Rated	
White	Not Identified	Level 4	Level 2	Level 3	Level 3	Level 3	
Multi-racial	Not Identified	Not Rated	Not Rated	Not Rated	Not Rated	Not Rated	

Suggested Level of Support for 2021-2022: **Not Identified** 2018-2019: **Not Identified** 2017-2018: **Not Identified**

Met ELA and Math Participation target (95%) for all student groups: **Yes** (details on pages 4 and 7)

Received Title I Funds in 2018-19: **No**

Please note the following:

- Indicator ratings that display 'Not Rated' refer to student groups that do not meet the minimum n-size to receive a rating.
- The expansion of the federal free/reduced price meal program increased the number students included in the Economically Disadvantaged student group in 2021-22.
- The English learner student group has different inclusion rules for particular indicators.
- The Underserved Race/Ethnicity student group consists of the following racial/ethnic groups: American Indian/Alaska Native, Black/African American, Hispanic/Latino, and Native Hawaiian/Pacific Islander.
- The Underserved Race/Ethnicity group is eligible to be identified for targeted improvement only when none of the four student groups that comprise it have sufficient data to be considered for identification.

English Language Arts Academic Achievement Details

District: Scappoose SD 1J

School: Sauvie Island School

English Language Arts Achievement Level	Cut
Level 5	80
Level 4	67
Level 3	54
Level 2	25
Level 1	<25

The English Language Arts (ELA) Achievement indicator displays the percentage of students meeting the ELA achievement standard, the adjusted denominator, and the corresponding rating for each student group. The data table shows two years of data, a two-year average, and the applied rate (i.e., the two-year average after meeting the minimum n-size of 20). ‘*’ means data was hidden to protect student confidentiality and ‘Not Rated’ refers to student groups that do not meet the minimum n-size to receive a rating. Note that the expansion of the federal free/reduced price meal program increased the number students included in the Economically Disadvantaged student group in 2021-22.

State Long Term Goal: 80%

Student Group		2018-19	2021-22	2-year Average	Rated on	Level
All Students - Percent		77.0	61.9	69.4	Average Rate	Level 4
All Students - Adjusted Denominator		139	139	278		
Economically Disadvantaged - Percent		41.7	61.9	58.9	Average Rate	Level 3
Economically Disadvantaged - Adjusted Denominator		24	139	163		
English Learners - Percent		*	*	*	Not Rated	Not Rated
English Learners - Adjusted Denominator		*	*	*		
Students with Disabilities - Percent		47.6	31.8	39.5	Average Rate	Level 2
Students with Disabilities - Adjusted Denominator		21	22	43		
American Indian/Alaska Native - Percent		*	*	*	Not Rated	Not Rated
American Indian/Alaska Native - Adjusted Denominator		*	*	*		
Black/African American - Percent		*	*	*	Not Rated	Not Rated
Black/African American - Adjusted Denominator		*	*	*		
Hispanic/Latino - Percent		58.3	61.5	60.0	Average Rate	Level 3
Hispanic/Latino - Adjusted Denominator		12	13	25		
Native Hawaiian/Pacific Islander - Percent		*	*	*	Not Rated	Not Rated
Native Hawaiian/Pacific Islander - Adjusted Denominator		*	*	*		
Underserved Race/Ethnicity - Percent		61.5	61.5	61.5	Average Rate	Not Applicable
Underserved Race/Ethnicity - Adjusted Denominator		13	13	26		
Asian - Percent		*	*	*	Not Rated	Not Rated
Asian - Adjusted Denominator		*	*	*		
White - Percent		77.7	59.8	68.8	Average Rate	Level 4
White - Adjusted Denominator		112	112	224		
Multi-racial - Percent		80.0	*	78.9	Not Rated	Not Rated
Multi-racial - Adjusted Denominator		10	*	*		

Note: An * next to Level 2 indicates that, although the student group did not meet the Level 2 cut for this indicator, this student group is not in the lowest ten percent of schools in Oregon.

English Language Arts Average Gap Score Change Details

District: Scappoose SD 1J

School: Sauvie Island School

The English Language Arts (ELA) Average Score Change indicator uses the difference between a student's score and the cut score for the assessment, called a gap score. The table displays the average gap score by school year, the change in the average gap score, the count of students tested, and the corresponding rating for each student group. '*' means data was hidden to protect student confidentiality and 'Not Rated' refers to student groups that do not meet the minimum n-size to receive a rating. Note that the expansion of the federal free/reduced price meal program increased the number students included in the Economically Disadvantaged student group in 2021-22.

ELA Average Gap Score Change	Cut
Level 5	5
Level 4	-7
Level 3	-19
Level 2	-42
Level 1	<-42

Student Group	2018-19	2021-22	Change in Average	Level
All Students	50	28	-22	Level 2
All Students - Denominator	139	139		
Economically Disadvantaged	2	28	26	Level 5
Economically Disadvantaged - Denominator	24	139		
English Learners	*	*	*	Not Rated
English Learners - Denominator	*	*		
Students with Disabilities	-4	-25	-21	Level 2
Students with Disabilities - Denominator	21	22		
American Indian/Alaska Native	*	*	*	Not Rated
American Indian/Alaska Native - Denominator	*	*		
Black/African American	*	*	*	Not Rated
Black/African American - Denominator	*	*		
Hispanic/Latino	9	14	5	Not Rated
Hispanic/Latino - Denominator	12	13		
Native Hawaiian/Pacific Islander	*	*	*	Not Rated
Native Hawaiian/Pacific Islander - Denominator	*	*		
Underserved Race/Ethnicity	14	14	0	Not Applicable
Underserved Race/Ethnicity - Denominator	13	13		
Asian	*	*	*	Not Rated
Asian - Denominator	*	*		
White	53	28	-25	Level 2
White - Denominator	112	112		
Multi-racial	64	*	*	Not Rated
Multi-racial - Denominator	10	*		

English Language Arts Participation Details

District: Scappoose SD 1J

School: Sauvie Island School

All students in tested grades and enrolled on the first school day in May must take a statewide assessment. The data table displays the percentage of students who took a statewide assessment by school year and student group. The applied rate for the participation status is the two-year average after meeting the minimum n-size of 20. 'Not Rated' means the student group did not meet minimum size requirements in order to receive a rating. Note that the expansion of the federal free/reduced price meal program increased the number students included in the Economically Disadvantaged student group in 2021-22.

Participation Target: 94.5%

Student Group		2018-19	2021-22	2-year Average	Status based on	Status
All Students - Percent		100.0	99.3	99.6	Average Rate	Met
All Students - Denominator		140	142	282		
Economically Disadvantaged - Percent		100.0	99.3	99.4	Average Rate	Met
Economically Disadvantaged - Denominator		25	142	167		
English Learners - Percent		100.0	100.0	100.0	Not Rated	Not Rated
English Learners - Denominator		4	4	8		
Students with Disabilities - Percent		100.0	95.7	97.7	Average Rate	Met
Students with Disabilities - Denominator		21	23	44		
American Indian/Alaska Native - Percent		--	--	--	Not Rated	Not Rated
American Indian/Alaska Native - Denominator		0	0	0		
Black/African American - Percent		100.0	--	100.0	Not Rated	Not Rated
Black/African American - Denominator		1	0	1		
Hispanic/Latino - Percent		100.0	100.0	100.0	Average Rate	Met
Hispanic/Latino - Denominator		12	13	25		
Native Hawaiian/Pacific Islander - Percent		--	--	--	Not Rated	Not Rated
Native Hawaiian/Pacific Islander - Denominator		0	0	0		
Underserved Race/Ethnicity - Percent		100.0	100.0	100.0	Average Rate	Met
Underserved Race/Ethnicity - Denominator		13	13	26		
Asian - Percent		100.0	100.0	100.0	Not Rated	Not Rated
Asian - Denominator		4	5	9		
White - Percent		100.0	99.1	99.6	Average Rate	Met
White - Denominator		113	115	228		
Multi-racial - Percent		100.0	100.0	100.0	Not Rated	Not Rated
Multi-racial - Denominator		10	9	19		

Mathematics Academic Achievement Details

District: Scappoose SD 1J

School: Sauvie Island School

Mathematics Achievement Level	Cut
Level 5	80
Level 4	62
Level 3	43
Level 2	13
Level 1	<13

The Mathematics Achievement indicator displays the percentage of students meeting the Mathematics achievement standard, the adjusted denominator, and the corresponding rating for each student group. The data table shows two years of data, a two-year average, and the applied rate (i.e., the two-year average after meeting the minimum n-size of 20). ‘*’ means data was hidden to protect student confidentiality and ‘Not Rated’ refers to student groups that do not meet the minimum n-size to receive a rating. Note that the expansion of the federal free/reduced price meal program increased the number students included in the Economically Disadvantaged student group in 2021-22.

State Long Term Goal: 80%

Student Group		2018-19	2021-22	2-year Average	Rated on	Level
All Students - Percent		62.0	54.3	58.2	Average Rate	Level 3
All Students - Adjusted Denominator		137	138	275		
Economically Disadvantaged - Percent		37.5	54.3	51.9	Average Rate	Level 3
Economically Disadvantaged - Adjusted Denominator		24	138	162		
English Learners - Percent		*	*	*	Not Rated	Not Rated
English Learners - Adjusted Denominator		*	*	*		
Students with Disabilities - Percent		33.3	27.3	30.2	Average Rate	Level 2
Students with Disabilities - Adjusted Denominator		21	22	43		
American Indian/Alaska Native - Percent		*	*	*	Not Rated	Not Rated
American Indian/Alaska Native - Adjusted Denominator		*	*	*		
Black/African American - Percent		*	*	*	Not Rated	Not Rated
Black/African American - Adjusted Denominator		*	*	*		
Hispanic/Latino - Percent		33.3	23.1	28.0	Average Rate	Level 2
Hispanic/Latino - Adjusted Denominator		12	13	25		
Native Hawaiian/Pacific Islander - Percent		*	*	*	Not Rated	Not Rated
Native Hawaiian/Pacific Islander - Adjusted Denominator		*	*	*		
Underserved Race/Ethnicity - Percent		38.5	23.1	30.8	Average Rate	Not Applicable
Underserved Race/Ethnicity - Adjusted Denominator		13	13	26		
Asian - Percent		*	*	*	Not Rated	Not Rated
Asian - Adjusted Denominator		*	*	*		
White - Percent		63.6	54.1	58.8	Average Rate	Level 3
White - Adjusted Denominator		110	111	221		
Multi-racial - Percent		60.0	*	68.4	Not Rated	Not Rated
Multi-racial - Adjusted Denominator		10	*	*		

Note: An * next to Level 2 indicates that, although the student group did not meet the Level 2 cut for this indicator, this student group is not in the lowest ten percent of schools in Oregon.

Mathematics Average Gap Score Change Details

District: Scappoose SD 1J

School: Sauvie Island School

The Mathematics Average Score Change indicator uses the difference between a student's score and the cut score for the assessment, called a gap score. The table displays the average gap score by school year, the change in the average gap score, the count of students tested, and the corresponding rating for each student group. '*' means data was hidden to protect student confidentiality and 'Not Rated' refers to student groups that do not meet the minimum n-size to receive a rating. Note that the expansion of the federal free/reduced price meal program increased the number students included in the Economically Disadvantaged student group 2021-22.

Math Average Gap Score Change	Cut
Level 5	4
Level 4	-11
Level 3	-24
Level 2	-49
Level 1	<-49

Student Group	2018-19	2021-22	Change in Average	Level
All Students	24	5	-19	Level 3
All Students - Denominator	137	138		
Economically Disadvantaged	-28	5	33	Level 5
Economically Disadvantaged - Denominator	24	138		
English Learners	*	*	*	Not Rated
English Learners - Denominator	*	*		
Students with Disabilities	-22	-39	-17	Level 3
Students with Disabilities - Denominator	21	22		
American Indian/Alaska Native	*	*	*	Not Rated
American Indian/Alaska Native - Denominator	*	*		
Black/African American	*	*	*	Not Rated
Black/African American - Denominator	*	*		
Hispanic/Latino	-15	-28	-13	Not Rated
Hispanic/Latino - Denominator	12	13		
Native Hawaiian/Pacific Islander	*	*	*	Not Rated
Native Hawaiian/Pacific Islander - Denominator	*	*		
Underserved Race/Ethnicity	-11	-28	-17	Not Applicable
Underserved Race/Ethnicity - Denominator	13	13		
Asian	*	*	*	Not Rated
Asian - Denominator	*	*		
White	23	2	-21	Level 3
White - Denominator	110	111		
Multi-racial	66	*	*	Not Rated
Multi-racial - Denominator	10	*		

Mathematics Participation Details

District: Scappoose SD 1J

School: Sauvie Island School

All students in tested grades and enrolled on the first school day in May must take a statewide assessment. The data table displays the percentage of students who took a statewide assessment by school year and student group. The applied rate for the participation the two-year average after meeting the minimum n-size of 20. 'Not Rated' means the student group did not meet minimum size requirements in order to receive a rating. Note that the expansion of the federal free/reduced price meal program increased the number students included in the Economically Disadvantaged student group in 2021-22.

Participation Target: 94.5%

Student Group	2018-19	2021-22	2-year Average	Status based on	Status
All Students - Percent	98.6	98.6	98.6	Average Rate	Met
All Students - Denominator	140	142	282		
Economically Disadvantaged - Percent	100.0	98.6	98.8	Average Rate	Met
Economically Disadvantaged - Denominator	25	142	167		
English Learners - Percent	100.0	100.0	100.0	Not Rated	Not Rated
English Learners - Denominator	4	4	8		
Students with Disabilities - Percent	100.0	95.7	97.7	Average Rate	Met
Students with Disabilities - Denominator	21	23	44		
American Indian/Alaska Native - Percent	--	--	--	Not Rated	Not Rated
American Indian/Alaska Native - Denominator	0	0	0		
Black/African American - Percent	100.0	--	100.0	Not Rated	Not Rated
Black/African American - Denominator	1	0	1		
Hispanic/Latino - Percent	100.0	100.0	100.0	Average Rate	Met
Hispanic/Latino - Denominator	12	13	25		
Native Hawaiian/Pacific Islander - Percent	--	--	--	Not Rated	Not Rated
Native Hawaiian/Pacific Islander - Denominator	0	0	0		
Underserved Race/Ethnicity - Percent	100.0	100.0	100.0	Average Rate	Met
Underserved Race/Ethnicity - Denominator	13	13	26		
Asian - Percent	100.0	100.0	100.0	Not Rated	Not Rated
Asian - Denominator	4	5	9		
White - Percent	98.2	98.3	98.2	Average Rate	Met
White - Denominator	113	115	228		
Multi-racial - Percent	100.0	100.0	100.0	Not Rated	Not Rated
Multi-racial - Denominator	10	9	19		

Regular Attenders Details

District: Scappoose SD 1J

School: Sauvie Island School

The Regular Attenders indicator displays the percentage of students attending for more than 90 percent of their enrolled school days, the denominator, and the corresponding rating for each student group. The data table shows two years of data, a two-year average, and the applied rate (i.e., the two-year average after meeting the minimum n-size of 20). ‘*’ means data was hidden to protect student confidentiality and ‘Not Rated’ refers to student groups that do not meet the minimum n-size to receive a rating. Note that the expansion of the federal free/reduced price meal program increased the number students included in the Economically Disadvantaged student group in 2021-22.

Regular Attenders Level	Cut
Level 5	93
Level 4	89
Level 3	85
Level 2	65
Level 1	<65

State Long Term Goal: 93%

Student Group	Grade Range		2018-19	2021-22	2-year Average	Rated on	Level
All Students - Percent	K-5		93.5	82.4	87.9	Average Rate	Level 3
All Students - Denominator			139	142	281		
Economically Disadvantaged - Percent	K-5		88.2	82.4	83.0	Average Rate	Level 2
Economically Disadvantaged - Denominator			17	142	159		
English Learners - Percent	K-5		*	*	*	Not Rated	Not Rated
English Learners - Denominator			*	*	*		
Students with Disabilities - Percent	K-5		83.3	>95	92.3	Average Rate	Level 4
Students with Disabilities - Denominator			18	*	*		
American Indian/Alaska Native - Percent	K-5		*	*	*	Not Rated	Not Rated
American Indian/Alaska Native - Denominator			*	*	*		
Black/African American - Percent	K-5		*	*	*	Not Rated	Not Rated
Black/African American - Denominator			*	*	*		
Hispanic/Latino - Percent	K-5		>95	72.2	83.3	Average Rate	Level 2
Hispanic/Latino - Denominator			*	18	*		
Native Hawaiian/Pacific Islander - Percent	K-5		*	*	*	Not Rated	Not Rated
Native Hawaiian/Pacific Islander - Denominator			*	*	*		
Underserved Race/Ethnicity - Percent	K-5		>95	72.2	83.9	Average Rate	Not Applicable
Underserved Race/Ethnicity - Denominator			*	18	*		
Asian - Percent	K-5		*	*	*	Not Rated	Not Rated
Asian - Denominator			*	*	*		
White - Percent	K-5		92.7	83.8	88.1	Average Rate	Level 3
White - Denominator			109	117	226		
Multi-racial - Percent	K-5		91.7	*	88.9	Not Rated	Not Rated
Multi-racial - Denominator			12	*	*		

Note: An * next to Level 2 indicates that, although the student group did not meet the Level 2 cut for this indicator, this student group is not in the lowest ten percent of schools in Oregon.

On Track to English Language Proficiency (ELP) Details

District: Scappoose SD 1J

School: Sauvie Island School

The On Track to English Language Proficiency (ELP) indicator displays the percentage of students who are on track to attain ELP, the denominator, and the corresponding rating for each student group. The data table shows two years of data, a two-year average, and the applied rate (i.e., the two-year average after meeting the minimum n-size of 20). '*' means data was hidden to protect student confidentiality and 'Not Rated' refers to student groups that do not meet the minimum n-size to receive a rating. Note that the expansion of the federal free/reduced price meal program increased the number students included in the Economically Disadvantaged student group in 2021-22.

On Track to ELP Level	Cut
Level 5	80
Level 4	68
Level 3	56
Level 2	26
Level 1	<26

State Long Term Goal: 80%

Student Group		2018-19	2021-22	2-year Average	Rated on	Level
Current English Learners - Percent		*	*	40.0	Not Rated	Not Rated
Current English Learners - Denominator		*	*	*		



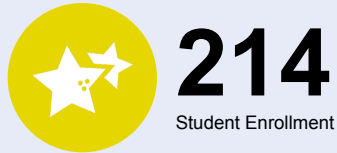
OREGON AT-A-GLANCE SCHOOL PROFILE

Sauvie Island School



PRINCIPAL: Darla Meeuwssen | GRADES: K-8 | 14445 NW Charlton Rd, Portland 97231 | 503-621-3426

Students We Serve



DEMOGRAPHICS

American Indian/Alaska Native	
Students	0%
Teachers	0%
Asian	
Students	2%
Teachers	13%
Black/African American	
Students	0%
Teachers	0%
Hispanic/Latino	
Students	12%
Teachers	0%
Multiracial	
Students	5%
Teachers	0%
Native Hawaiian/Pacific Islander	
Students	0%
Teachers	0%
White	
Students	81%
Teachers	88%

* **2** Languages Spoken

15% Students with Disabilities

85% Required Childhood Vaccinations

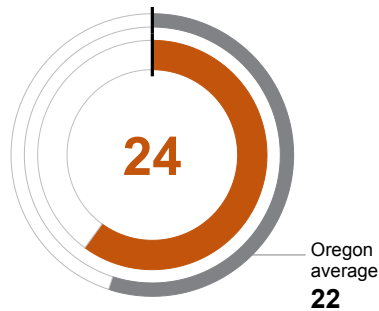
>95% Free/Reduced Price Lunch

*<10 students or data unavailable

School Environment

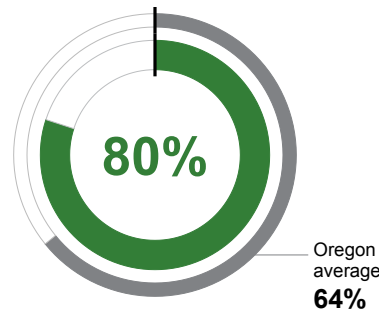
CLASS SIZE

Median class size.



REGULAR ATTENDERS

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



Academic Progress

INDIVIDUAL STUDENT PROGRESS

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

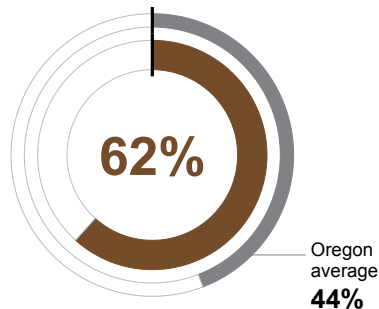
Data not available in 2021-22

338

Academic Success

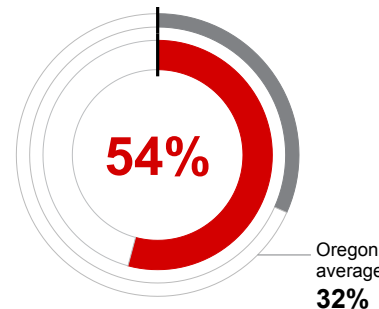
ENGLISH LANGUAGE ARTS

Students meeting state grade-level expectations.



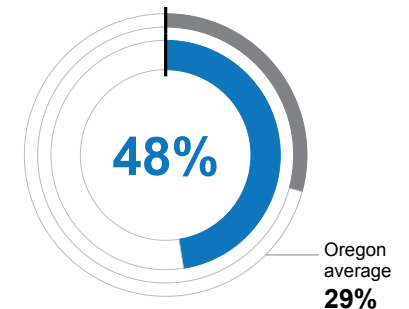
MATHEMATICS

Students meeting state grade-level expectations.



SCIENCE

Students meeting state grade-level expectations.



School Goals

SIS is a nonprofit, K-8 public charter school providing students with unique learning experiences. Our vision is to systematically and intentionally integrate the concepts of Placed-Based Education into quality standards-based core curriculum so students are engaged in their learning and connected to their community. At SIS, sense of place and the importance of community are key. Students learn and experience the value of applied and real-world experiences in our community. Students develop the ability to think critically, communicate effectively and excel academically.

State Goals

The Oregon Department of Education is partnering with school districts and local communities to ensure a 90% on-time, four year graduation rate by 2025. To progress toward this goal, the state will prioritize efforts to improve attendance, provide a well-rounded education, invest in implementing culturally responsive practices, and promote continuous improvement to close opportunity and achievement gaps for historically and currently underserved students.

Safe & Welcoming Environment

SIS strives to ensure all students and their parents/guardians feel welcome, included and part of our school community. As a public charter school, our students come from many of the surrounding communities and bring with them a wealth of experiences, diverse backgrounds, and varied perspectives. At SIS we believe in positive behavior interventions and supports (PBIS) by teaching behavioral expectations and acknowledging students for following them as a more positive approach than waiting for misbehavior to occur before responding. As a school and a community, we focus on being respectful, responsible, safe and kind.



Outcomes

Our Staff (rounded FTE)



13

Teachers



5

Educational assistants



1

Counselors/
Psychologists



80%

Average teacher retention rate



77%

% of licensed teachers with more than 3 years of experience



Yes

Same principal in the last 3 years

REGULAR ATTENDERS

American Indian/Alaska Native	<10 students or data unavailable
Asian	<10 students or data unavailable
Black/African American	<10 students or data unavailable
Hispanic/Latino	76%
Multiracial	82%
Native Hawaiian/Pacific Islander	<10 students or data unavailable
White	80%
Free/Reduced Price Lunch	80%
Ever English Learner	<10 students or data unavailable
Students with Disabilities	87%
Migrant	<10 students or data unavailable
Homeless	<10 students or data unavailable
Students in Foster Care	<10 students or data unavailable
Talented and Gifted	<10 students or data unavailable
Female	72%
Male	90%
Non-Binary	<10 students or data unavailable

ENGLISH LANGUAGE ARTS

<10 students or data unavailable
<10 students or data unavailable
<10 students or data unavailable
62%
<10 students or data unavailable
<10 students or data unavailable
60%
62%
<10 students or data unavailable
<10 students or data unavailable
32%
<10 students or data unavailable
<10 students or data unavailable
<10 students or data unavailable
67%
57%
<10 students or data unavailable

MATHEMATICS

<10 students or data unavailable
<10 students or data unavailable
<10 students or data unavailable
23%
<10 students or data unavailable
<10 students or data unavailable
54%
54%
<10 students or data unavailable
27%
<10 students or data unavailable
<10 students or data unavailable
339
<10 students or data unavailable
<10 students or data unavailable
44%
64%
<10 students or data unavailable

About Our School

BULLYING, HARASSMENT, AND SAFETY POLICIES

To ensure a safe and secure learning environment for all students we have clear policies regarding bullying/harassment, as well as ongoing education for students and staff. Students receive guidance lessons that teach students how to recognize, respond and report bullying, harassment and unsafe behaviors. Students practice using Kelso's Choices to learn how to solve small problems on their own. We have a Student Support Team that supports students, staff and families. In addition, we have an emergency action plan, regular safety drills and a school safety committee. Each year students and parents are encouraged to provide feedback on the annual student and parent surveys.

EXTRACURRICULAR ACTIVITIES

At SIS we believe in using the local community and environment as a starting point to teaching concepts in language arts, mathematics, social studies, science and other subjects across the curriculum. We offer academic and extracurricular activities:

- Service Learning, Art, Music
- Sunday Science, Talent Show, Field Day

Middle School Specific:

- 8th Grade Project, Mock Trial, Student Ambassadors
- Football, Volleyball, Cross Country, Wrestling, Girls & Boys Basketball, Track
- Dances, Assemblies, Spirit Week, Boat Building, Outdoor School
- Electives: Art, Music Club, Gardening, Yearbook, Community Service, etc.

PARENT ENGAGEMENT

At SIS we welcome and encourage parent/guardian engagement. We have an active parent-teacher club and volunteer coordinators who help coordinate and support our Place-based approach to learning.

- School-wide Welcome Back BBQ, Family Curriculum Nights, K-8 Open House
- Parent Conferences & Music Concerts (Winter & Spring)
- Daily School Lunch Program

All volunteers go through a background check prior to working with students. Staff regularly communicates with parents on a weekly basis, a schoolwide newsletter every other week and parent conferences twice a year for all grades. We provide interpreters for conferences and meetings, to ensure all families are able to access information regarding their student(s).

COMMUNITY ENGAGEMENT

Community partnerships and engagement are essential for our Place-Based Program. Community partners provide knowledge of the area and the environment, to develop, grow and implement our curriculum. We work with our partners to host events and service learning opportunities, in order to help foster stewardship for the community.

Events Include: Harvest Festival, Clothing & Book Exchange

This year we worked closely with island partners, such as Columbia Farms, SI Pumpkin Patch, Topaz Farm, Sauvie Island Ctr, the SI Community Assoc, the SI Grange, Bailey's Nursery, the SI Fire Assoc, and many more to provide our students and teachers access to resources that enhance instruction and our local "Out and Abouts."

2021-22		Scappoose SD	Sauvie Island School	Grant Watts Elementary	Warren	Otto Petersen	Scappoose Middle School	Scappoose High School	South Columbia Family School	Scappoose Online Academy
American Indian/Alaska Native										
	Students	1%	0%	<1%	1%	1%	1%	1%	2%	1%
	Staff	0%	0%	0%	0%	0%	0%	0%	0%	0%
Asian										
	Students	1%	2%	1%	0%	<1%	1%	2%	0%	0%
	Staff	1%	13%	0%	0%	0%	0%	0%	0%	0%
Black/African American										
	Students	<1%	0%	0%	1%	1%	<1%	<1%	0%	1%
	Staff	0%	0%	0%	0%	0%	0%	0%	0%	0%
Hispanic/Latino										
	Students	11%	12%	12%	9%	12%	10%	9%	8%	9%
	Staff	3%	0%	0%	0%	7%	0%	5%	0%	0%
Multiracial										
	Students	7%	5%	14%	5%	8%	7%	5%	2%	5%
	Staff	1%	0%	0%	0%	0%	0%	2%	0%	0%
Native Hawaiian/Pacific Islander										
	Students	1%	0%	<1%	1%	<1%	1%	<1%	0%	3%
	Staff	0%	0%	0%	0%	0%	0%	0%	0%	0%
White										
	Students	79%	81%	73%	83%	78%	80%	80%	88%	81%
	Staff	95%	88%	100%	100%	93%	100%	93%	100%	100%



SCAPPOOSE SCHOOL DISTRICT

"Cultivating passionate lifelong learners for an ever-changing world"

January 11, 2023

Oregon Department of Education
State School Board
255 Capitol Street NE
Salem, OR 97310-0203

RE: Sauvie Island School Charter Waiver Request

Dear State School Board:

The Scappoose School District finds no objection to continuing Sauvie Island School's waiver request as per the ORS 338. If approved by the State Board of Education, we understand that this waiver will be valid for providing preferences in the enrollment processes as defined in our charter agreement. Our charter agreement lists preferences as follows:

- Existing Student
- Siblings of Existing Students
- Staff Children
- On-Island Children
- Within the District Children
- Outside the District Children

Thank you for your consideration.

Sincerely,

Tim Porter, Superintendent
Scappoose School District

Cc: SIS Board, SIS Director

2023 Charter School Waiver Request Form

Charter School Overview

Category	Your Response
Charter School Name	Sauvie Island School
Address	14445 NW Charlton Rd, Portland OR 97056
Administrator Name	Darla Meeuwsen
Contact Information	(503) 621-3426 & dmeeuwsen@sauvieislandschool.org
School District	Scappoose SD
Year School Opened	2011
Current Charter Contract Dates (Start and End Date)	22/23-26/27 (5 years)
Brief description of your charter school's educational model (max 500 characters)	<p>At Sauvie Island School, we strive to systematically and intentionally integrate the concepts of Place-Based Education, Project-Based Learning, and Thematic Instruction into a quality standards-based core curriculum so that students are engaged in their learning and connected to their community.</p> <p>We provide the K-8 children of our community an opportunity to learn through the values of stewardship deeply rooted in the uniqueness that Sauvie Island offers. Our school is the heart of the Sauvie Island community. It is a meeting place that fosters an environment where students, parents, staff, and the community are partners in the educational process for the achievement of all children. We believe in the power of bridging classrooms and communities to help students grow and learn.</p>

Waiver Request Summary

What statute would you like the State Board to waive?	ORS 338.125(3)
Please summarize the waiver request (max 500 characters)	Sauvie Island School is respectfully requesting that the State Board waives ORS 338.125(3) to allow the school to continue the priority admission of children of SIS staff members. Over the past 6 years, 4.6% of the student body has been represented by children of staff members and this has proven to be a successful retention and recruitment tool at our school located in a rural area.

Waiver Request Detail

1. Who are the racial/ethnic and underserved groups affected? What is the potential impact of the resource allocation and strategic investment to these groups?

Sauvie Island School's racial/ethnic demographics include students representing 13% Hispanic, 5.1% Multiracial, 1% American Indian/Alaskan Native, 1% Asian, and 79.9% White populations. These demographics are reflective of the district at large with the exception of Hispanic representation which is 2% higher at SIS than the rest of the district. *(Please see attached demographics comparison)*. The majority of the Hispanic population at Sauvie Island School is represented by migrant families residing in the local community. SIS is the "neighborhood school" for island residents and provides a high-quality, convenient, and free K-8 learning environment for all migrant youth on the island. Approximately 23% of enrolled students receive free and reduced lunch at SIS. The longer staff members maintain their employment at the school, the better they can build relationships and meet the needs of underserved students. Staff members with children currently or previously enrolled at the school maintain longer-term employment at the school and are able to provide meaningful support to underserved students and their families. For example, 4 of our 23 staff members (two with currently enrolled students and two with previously enrolled students) have been employed at the school for 6 to 12 years.

To date, staff members have become employed at the school after their children were enrolled through the school's state-allowable lottery process. As a result, the underserved groups represented at SIS have not been impacted by priority enrollment of children of staff members. Sauvie Island residents are prioritized above the children of staff members in the priority enrollment process at SIS. This ensures that all children of migrant families on Sauvie Island have high admission priority as island residents. In addition, no underserved populations from Sauvie Island have been denied admission or placed on the waitlist due to the placement of a staff member's child. Rather, it is a helpful retention tool and supports long-term investment in the school.

Public schools are able to use a mechanism called an "inter-district transfer" which allows students to transfer to schools from other districts. Inter-district transfers serve as a retention tool for traditional public schools and the waiver provides an alternative for Charters as the current ORS does not provide this mechanism. Nearby St Helens School District has specific verbiage in employee contracts describing the opportunity for inter-district transfers for staff. Scappoose School District, Sauvie Island School's sponsor district, has an average of 30-40 inter-district transfers each year. Many of these transfers take place to allow children of staff members to attend the school where their parents are employed.

2. Does the decision being made ignore or worsen existing disparities or produce other unintended consequences? What is the impact on eliminating the opportunity gap?

It is our belief that the decision to waive the statute would not ignore or worsen disparities or produce other unintended consequences. When reviewing data related to the enrollment of children of SIS staff members over the past 11 years, 100% of staff members with children at the school were hired after their child was enrolled. These qualified staff members chose to pursue employment at the school because of the environment, convenience, and economic benefits. The cost of childcare and commuting could be otherwise prohibitive, but there are numerous benefits to working at the same location as your child(ren). Priority enrollment of children is listed in employee offer letters, allowing SIS to expand the benefits offered to our staff members.

An average of 3.7% to 5.5% of the student body has been children of staff members since 2017. On average, over half of these students are from minority groups. In all of these instances, the student spots would have been taken regardless of whether or not their parent was employed at the school as all parents were hired after their child was enrolled at the school. Of the current employees with children who are attending or have attended SIS, 2 employees have been here for more than 8 years and the rest have been employed for a minimum of five years

each. Currently, one 10-year employee of the school may have the ability to enroll his child when they are of age in 2025, thus increasing the likelihood of his continued employment at the school. To date, the waiver has not displaced students who would otherwise be granted enrollment in the school. Instead, it provides an additional benefit to staff while helping to ensure strong teacher investment in the SIS learning environment.

3. What are the barriers to more equitable outcomes? (E.g. mandated, political, emotional, financial, programmatic or managerial)

One established barrier to more equitable access/outcomes for our student population is transportation. Sauvie Island School is located in the heart of Sauvie Island, a rural/agricultural island in close proximity to Multnomah, Washington and Columbia counties. Students commute to the school from all three counties within a 50 mile radius from as far as North Portland and Columbia City. Transportation to and from the school can be challenging, especially for students with limited financial means, and SIS works closely with families to help with access to transportation options.

SIS works closely with TriMet and Columbia County Rider bus systems as well as the local public school busing system to ensure plentiful routes are available to our students. Sauvie Island School provides morning and afternoon staffing at the Scappoose Middle School which acts as a transportation hub for students utilizing the Columbia County busing system. We employ a Transportation Coordinator who gathers information from each family at the beginning of the school year and works with them to create a customized transportation plan. Staff maintain a carpool directory to help any students who may live outside of busing zones where they match up carpool candidates based on their location/availability. Our ESL Specialist provides translation services and works closely with ESD's Migrant Services to make sure all information is provided in the native language of each family and to present transportation information in an accessible manner.

4. How have you intentionally involved stakeholders who are also members of the communities affected by the waiver request? How do present your information in questions (1), (2) and (3) to these stakeholders?

Sauvie Island School provides detailed information about the enrollment/application process, transportation options and other pertinent information using a variety of platforms in the native languages of our school families. Families are provided with printed versions of enrollment information, the lottery process, Free and Reduced lunch forms, transportation options, etc. during in-person enrollment events, mailed upon request, in Parent/Student Handbooks distributed to each student, and they are readily available at the school any time. This information is readily available on the website and in e-newsletters as well.

SIS also hosts several informational events both in-person and on Zoom so that all families can access necessary information. There is a Kinder Info and Middle School Info night presented virtually and in-person and school staff regularly provide tours for interested families. The ESL Specialist is available for translation services for any informational events and conducts outreach to Spanish-speaking families at the beginning of the enrollment process. Translation, customized instruction, and support services are provided throughout students' enrollment at the school.

The clear communication and informational events about the enrollment process have helped to prevent the school from receiving any complaints about the process. We do receive regular inquiries from interested families and promptly describe the enrollment process, point them to website information, and/or provide printed information if applicable. The priority enrollment procedure is described as follows in enrollment materials and using the methods as described above:

OVERVIEW OF ENROLLMENT PROCESS

- Applications for the 2023-2024 school year were available on the Sauvie Island School Enrollment web page from February 1, 2023 through March 24, 2023.

- Students currently enrolled at SIS will be required to submit an enrollment application with their space being guaranteed for the following school year.
- Priority enrollment is allowable by state law and gives priority to currently enrolled students, siblings of current students, Sauvie Island residents, children of staff members, then students residing within the Scappoose School District, and then to students residing outside SIS's sponsoring school district.

Priority of Admission:

1. Students who were enrolled in the school in the prior school year.*
2. Siblings of current students who are in 7th grade and younger during the application window.*
3. Sauvie Island residents.*
4. Children of SIS staff (allowable via state waiver)
5. Residents in the Scappoose SD*
6. Residents outside the Scappoose SD*

*Admission priorities allowable via ORS 338.125

- Applications for the 2023-2024 school year will not be accepted prior to February 1, 2022.
- Applications for the 2023-2024 school year will not be included in the lottery pool if received after March 24, 2023. Applications received after March 24, 2023, will be placed on the bottom of the waitlist, after the lottery in the order in which they are received.
- You will receive an e-mail confirmation that your application was received within 14 days.

5. How will you modify or enhance your strategies to ensure each students' and communities' individual and cultural needs are met?

SIS staff work closely together to develop and design curriculum reflecting both a diverse and Place-Based philosophy. Staff representing each grade band participate in regular DEI Committee meetings/work sessions where they share resources and best practices around weaving a DEI lens reflective of the school community into the daily curriculum. The SIS Library has received yearly DEI grants allowing us to purchase collections of books that are accessible to students and families. These books include content exploring different cultures and abilities, and there is a regularly updated collection of Spanish-language books.

The school's literacy curriculum centers around Geodes books which are designed to be inclusive and multicultural. From Geodes, "Written and illustrated by a talented group of authors and award-winning illustrators, Geodes reflect a broad range of identities and diverse experiences, allowing young students to see themselves, others, and worlds both familiar and distant." SIS uses Student Investment Account funds to purchase and implement the Literacy Program and we provide Orton-Gillingham training for our Reading Specialists so that they are able to customize small-group literacy lessons to meet the needs of learners with Dyslexia.

Our Licensed English Development Specialist works closely with Spanish-speaking families to meet them where they are and remove any barriers to accessing information, activities, events, and services connected to the school. This teacher is on-site daily and closely collaborates with the teachers, school counselor, administrative staff, students, and families. She actively participates in professional development activities and trainings, including the NWRESD Title III Consortium. She hosts a weekly lunch group at the school where students have the opportunity to explore cultural themes and self-guided conversations. This group was the brainchild of a 5th-grade student at the school and has been proven to be a popular, effective support mechanism for students of all ages.

6. How are you collecting data on race, ethnicity, and native language?

SIS families self-report race, ethnicity, and native language during the enrollment process. We utilize the State of Oregon Language Use Survey which is provided and tracked for each enrolled student. Families are required to

complete annual enrollment paperwork where any updates to this information can be provided. Data is maintained in each student’s cumulative file and in the district-wide Synergy Information System. All required data is regularly reported to the Oregon Department of Education.

7. What is your commitment to P-20 professional learning for equity? What resources are you allocating for training in culturally responsive instruction?

As a Place-Based school, we focus on the local environment, people, and resources available to us that reflect our school community. This supports a culturally responsive teaching environment in that we are looking to the communities that our students belong to as guiding factors in our daily learning activities. The lived experiences of our students are reflected in their school environment and carefully considered as core elements of the curriculum. Local current events and broader world issues are regularly addressed in the classrooms and students are encouraged to develop their own critical thinking skills. Information and images displayed in classrooms and throughout the school represent diverse, varied groups.

Teachers at SIS work to understand the different learning styles of our K-8 students and accommodate those differences with modifications to the classroom and curriculum. We understand that a rigid classroom environment and expectations do not accommodate different learning styles and cultural identities. One-on-one and small group instruction is provided along with sensory items, quiet learning options, and customized learning options based on individual needs.

Sauvie Island School is dedicated to providing comprehensive learning opportunities for our students that provide equitable access to hands-on, workforce development opportunities. We maintain a long list of partners who work closely with staff and students to bring exposure to a variety of communities and opportunities. These partners include local agricultural businesses, Wind and Oar boat building program, nonprofit organizations such as Adaptive Sports NW Wheelchair Sports Program and Taking Ownership PDX, STEM programs, The Humane Society, Audubon Society, engineering and construction professionals, master gardeners, and many more who come to the school to provide regular professional learning opportunities.

Data Collection

All charter schools with approved waivers will be required to report the impact of the wavier annually to the State Board. What is the charter school’s plan for collecting data on how the proposed waiver will impact students and the quality of education? The plan must minimally include disaggregated data by student demographics and stakeholder engagement.

To date, all staff members have been hired **after*** the enrollment of their children. As noted above, the benefit of priority enrollments contributes to an engaged, committed group of teachers with a long-term investment in the quality of SIS’s educational program. SIS tracks data related to the annual enrollment of staff members’ children and maintains it in the following spreadsheet format:

Sauvie Island School												
School Year	2022-23	2021-22	2020-21	2019-20	2018-19	2017-18	2016-17	2015-16	2014-15	2013-14	2012-13	2011-12
K-8 Enrollment	215	214	216	214	212	206	214	215	214	216	200	173
Total Staff (Full-time & Part-time)	23	22	21	21	20	21	23	23	23	23	22	13
Staff Students*	5	7	10	11	12	10	13	10	9	9	6	1
% of Staff Students	2.33%	3.27%	4.63%	5.14%	5.66%	4.85%	6.07%	4.65%	4.21%	4.17%	3.00%	0.58%

Sponsor Acknowledgment

The State Board is interested to understand the charter school sponsor's position on the waiver request. Please include evidence that the sponsor acknowledges being notified of the waiver request and whether or not the sponsor is in favor of the request.

Included as a separate attachment: Letter of Support

Included as a separate attachment: 2021-22 SIS vs SD Demographics Chart

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<p>SUBJECT: Kalmiopsis Community Arts Public Charter School Waiver Request STAFF NAME & OFFICE: Kate Pattison & Emily Nazarov, Government and Legal Affairs, Director’s Office; Kaci Elder, Kalmiopsis Community Arts High School Public Charter School</p> <p>Kalmiopsis Community Arts High School is requesting a waiver of employee licensure requirements in ORS 338.135(7)(c) and allow the school to employ more than 50% of the teaching and administrative FTE with a charter school registry by the Oregon Teacher Standards and Practices Commission (TSPC).</p>	<p><input checked="" type="checkbox"/> First Reading</p> <p><input checked="" type="checkbox"/> Presentation <input type="checkbox"/> No Presentation</p> <p><input type="checkbox"/> Action</p> <p><input type="checkbox"/> Temp Rule <input type="checkbox"/> Presentation <input type="checkbox"/> No Presentation</p>
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BACKGROUND

Public Charter School Waivers

The State Board of Education has been granted the authority to waive certain provisions of the Public Charter School Statutes in [ORS Chapter 338](#). The standards and process for requesting a waiver of ORS 338 have been set forth in [OAR 581-026-0130](#) and the 2020 Process to Request a Charter School Waiver.

ORS 338.025 Rules; waiver of provisions of chapter; exceptions.

(1) The State Board of Education may adopt any rules necessary for the implementation of this chapter. The rules shall follow the intent of this chapter.

(2) Upon application by a public charter school, the State Board of Education may grant a waiver of any provision of this chapter if the waiver promotes the development of programs by providers, enhances the equitable access by underserved families to the public education of their choice, extends the equitable access to public support by all students or permits high quality programs of unusual cost. The State Board of Education may not waive any appeal provision in this chapter or any provision under ORS 338.115 (1)(a) to (aa), 338.120, 338.125 (4), 338.135 (2)(b) or 339.122.

OAR 581-026-0130: Procedure to Waive Certain Provisions of the Charter School Law

(1) A public charter school may petition the State Board of Education for a waiver of any provision of ORS 338. The written petition must specify the reason(s) the charter school is seeking the waiver and any other relevant information.

(2) The public charter school must notify the sponsor if a waiver under this section is being considered. Waivers granted by the State Board to a charter school may require amending the charter under the provisions of OAR 581-026-0100 (7).

(3) The State Board of Education, upon receipt of a waiver petition, will review the petition and may grant the waiver upon a showing that approving the waiver would:

- (a) Promote the development of programs by providers;
- (b) Enhance the equitable access by underserved families to the public education of their choice;
- (c) Extend the equitable access to public support by all students; or
- (d) Permit the development of high quality programs of unusual cost.

(4) The State Board of Education may not waive any review provision under the Act or any provision under ORS 338.115(1).

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ODE Staff Analysis of Waiver Request

Kalmiopsis Community Arts High School (KCA) is a newly approved charter school that will begin operation in the 2023-24 school year under the sponsorship of the Three Rivers School District.

The charter school is requesting to waive ORS 338.135(7)(c), which requires that at least one-half of the total full-time equivalent (FTE) teaching and administrative staff at the public charter school be licensed by the Oregon Teacher Standards and Practices Commission (TSPC). The specific waiver request is limited to the first two years of operation and would allow founding teachers who are enrolled in teacher licensure programs to be employed with the TSPC charter school registry. The waiver request maintains 25% of the teaching and administrative FTE to be licensed by TSPC.

338.135 Employees; licensure and registration requirements

(7)(a) Any person employed as an administrator in a public charter school shall be licensed or registered to administer by the Teacher Standards and Practices Commission.

(b) Any person employed as a teacher in a public charter school shall be licensed or registered to teach by the commission.

(c) Notwithstanding paragraph (a) or (b) of this subsection, at least one-half of the total full-time equivalent (FTE) teaching and administrative staff at the public charter school shall be licensed by the commission pursuant to ORS 342.125.

If granted, KCA will be allowed to employ up to 75% of the teaching and administrative FTE with staff holding TSPC charter registries. KCA will still be required to comply with all other subsections of ORS 338.135.

SUMMARY OF PREVIOUS BOARD ACTION

The State Board of Education has not granted any previous waivers for Kalmiopsis Community Arts High School.

POLICY ISSUES OR CONCERNS

The State Board has considered three charter school teacher licensure waivers in the past. In 2004 a charter school requested the allowance for 40% of teachers to qualify with a restricted, provisional license while in an approved MAT program. The Board did not approve this waiver. In 2012, a small rural charter school that operates a state-wide virtual component requested the flexibility to employ registered teachers at their brick-and-mortar campus. The statute requires virtual public charter schools to employ 95% licensed teachers and the school wanted to have the 50% allowance for registered teachers in their brick-and-mortar program. The Board approved this request. In 2021, a language immersion school in Portland requested to have the 50% licensure requirement waived completely. The Board did not approve this request.

To date, the Board has not previously approved a waiver to allow a public charter school to employ more than 50% of the FTE as registered TSCP teachers.

The rules for TSPC charter school registry allow teachers to be employed by a public charter school without meeting the standard requirements of a license. At minimum, the teacher must pass a background check and finger printing requirements, have a letter from the public charter school

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AGENDA ITEM: 7.B.

certifying the employment and assignment, and pass the civil rights exam. Other qualifications can be established by the hiring charter school.

In Oregon, between 10%-15% of charter school teachers are registered by TSPC versus licensed. Public charter schools with curricular models that require alternative certification or specific knowledge requirements (e.g. Montessori, Waldorf, Language Immersion, and specific trades) typically have closer to 50% of their FTE employed as TSPC registered teachers.

For this waiver request, the charter school has requested to increase the percentage of staff with TSPC charter school registries to 75%. The sponsoring district has not provided a letter of support at this time but is aware of the request.

In 2021, ODE's charter school specialist met with TSPC Executive Director, Dr. Anthony Rosilez, and the TSPC Director of Licensure, Elizabeth Keller. TSPC expressed concern that reducing the percentage of licensed teachers and administrators in the public charter school below the limit put in place by the legislature, could weaken the capacity of the school to maintain professional and ethical responsibilities. Licensure requirements and ongoing professional learning support the integrity of the profession. Without a significant number of teachers and education leaders with the education, training, and professional accountability that come with a TSPC license, the students could experience harm because of a reduced capacity to teach the whole child, develop appropriate and culturally responsive curriculum, engage in educational planning, and uphold ethical conduct standards.

TSPC leadership also acknowledged a reduction of the licensure requirements may place an additional burden on the charter school's sponsor district to provide oversight and accountability for school staff who are held to the same level of instructional excellence and ethical conduct standards as licensed teachers.

EQUITY IMPACT ANALYSIS

See the application narrative provided by the requestor.

FISCAL ANALYSIS

There is no fiscal impact on the Department or the State Board of Education.

EFFECT OF A "YES" OR "NO" VOTE

Yes = If the Board grants the waiver as requested, Kalmiopsis Community Arts High School will be able to employ staff with a TSPC charter school registry up to 75% of the teaching and administrative FTE.

No = Kalmiopsis Community Arts High School will not be allowed to employ more than 50% FTE teaching and administrative staff with a TSPC charter school registry and must comply with ORS 338.135(7)(c).

ATTACHMENTS

Attachment 1: Kalmiopsis Community Arts High School Public Charter School Waiver Request

Charter School Overview

Category	Your Response
Charter School Name	Kalmiopsis Community Arts High School (KCA)
Address	PO Box 110, O Brien, OR 97534 (The school opens in August and is not yet receiving mail at its physical address)
Administrator Name	Kaci Elder, Teacher Leader
Contact Information	kaci@kcahs.org, 541-363-8806
School District	Three Rivers
Year School Opened	2023
Current Charter Contract Dates (Start and End Date)	August 2023 – June 30, 2026 [<i>Contract in process of finalization</i>]
Brief description of your charter school’s educational model (max 500 characters)	KCA will open August 2023, serving grades 9-11 the first year and grades 9-12 subsequently. Maximum enrollment is 16 students/grade, or 64 total students. KCA emphasizes the fine, performing, and literary arts, including arts-integration into all classes; place-based learning; and collaborations with professional artists, naturalists, historians, and craftspeople. KCA minimizes hierarchy via student-led meetings, restorative justice, and a teacher-run administration.

Waiver Request Summary

What statute would you like the State Board to waive?	* 338.135.7(c) “... at least one-half of the total full-time equivalent (FTE) teaching and administrative staff at the public charter school shall be licensed by the commission pursuant to ORS 342.125.”
Please summarize the waiver request (max 500 characters)	Temporarily reduce the 50% licensure requirement to 25%. The waiver would only apply to two of the school’s co-founders — unlicensed teachers (with a combined 25% teaching FTE) who are experienced educators currently enrolled in credential programs — and would be limited to two school years. The waiver would expand our ability to hire diverse non-licensed educators in our rural community.

Waiver Request Detail

1. Who are the racial/ethnic and underserved groups affected? What is the potential impact of the resource allocation and strategic investment to these groups?
The waiver would apply to two specific teachers, Ryan Forsythe and Melissa DeNardo, KCA teachers who have been co-creators of the school since 2017 and 2020, respectively. Melissa has 18 years teaching experience. She previously held a teaching certification in Arizona that expired prior to her move to Oregon; for financial reasons, at the time Melissa decided not to

renew her credential and became a private school classroom teacher. Ryan holds an M.S. in Higher Education Administration, an M.A. in Teaching Writing, an M.F.A. in Creative Writing, and two years experience teaching in the GED program through Rogue Community College’s Kerby campus in the Illinois Valley. KCA has adopted a teacher-run organizational model, and Melissa and Ryan will be registered through TSPC as both teachers and administrators.

The affected racial/ethnic and underserved groups include students who are low-income, have physical and mental disabilities, are from historically oppressed racial and ethnic backgrounds, are Multilingual Learners, and/or are members of the LGBTQ2SIA+ and/or transgender communities.

KCA recently opened enrollment for the 2023-2024 year, and 17 students have enrolled. A demographic comparison between KCA and Illinois Valley High School¹ are as follows:

Student Demographics	KCA	IVHS
Low-income (eligible for Oregon Trail, TANF, WIC, or Oregon Health Plan; or live below the poverty line; or qualify for the USDA free or reduced lunch program)	88%	>95%
Historically oppressed race or ethnicity ²	29.4%	30%
Mental or physical disability	47%	11%
Limited English Proficiency ³⁴	0%	5%
Historically oppressed sex, gender identity, or sexual orientation	29.4%	Data unavailable

This waiver will enable KCA to hire more non-licensed teachers, which will widen the eligibility pool of knowledgeable and talented educators who do not have teaching licenses. Eight non-licensed educators have met multiple times with the school’s co-founders to discuss possible part-time employment at KCA, and each would add diversity to the teaching staff, including an Asian-American environmental education and physical education educator, a Native American botany educator, a bilingual (Spanish/English) educator, a transgendered theatre educator, an LGBTQ2SIA+ educator, a specialist in African-American history, a retired nurse (age 60+) and a professional sculptor/artist (age 70+).

Potential positive impacts to the affected groups are more successful educational outcomes due to an increased diversity of teaching staff to better reflect students’ cultural backgrounds.

¹ Illinois Valley High School Report Card (2021-2022) <https://drive.google.com/file/d/1jnV1-3KgyOD-zIwj5Geu94YBK4S0TRam/view>

² This broad category is referenced in the enrollment form; disaggregated data will be collected through the registration forms

³ Terminology is in the process of being updated in accordance with Oregon’s transition from “LEP” to Multilingual Learners” (MP) classification

⁴ Linguistic, racial, and ethnic data is disaggregated in registration forms

2. Does the decision being made ignore or worsen existing disparities or produce other unintended consequences? What is the impact on eliminating the opportunity gap?

The waiver is intended to narrow existing disparities. The potential for increased diversity in the teaching staff has been addressed; another potentially positive impact on eliminating the opportunity gap is the potential for increased teacher retention.

Confirmed data of the percentage of Illinois Valley teachers who live non-locally was not accessible; however, anecdotal data from a current Illinois Valley High School teacher indicated approximately six of the 19 teachers live in the Illinois Valley, or 32%. This leaves an estimated 68% of Illinois Valley High School teachers commuting from Grants Pass (an estimated 45-minute commute) or further away. KCA would like to increase the percentage of teachers who live in the Illinois Valley. Teachers who commute more than 45 minutes to their school site are more likely to leave the school; additionally, they receive somewhat lower classroom observation ratings and are absent two more days, on average, than teachers with shorter commutes (Santelli and Grissom, 2022). Furthermore, the only highway that connects Grants Pass and the Illinois Valley is Highway 199, a two-lane mountainous route that is rated the 13th-most dangerous highway in the United States, with a crash rate similar to other regional highways yet with a significantly higher crash severity⁵. The commute time coupled with dangerous road conditions has contributed to teacher turnover in local schools (personal communication, 2022). Finally, “Among rural teachers, those who lived further away from the schools where they work had fewer ties to the school’s surrounding community and felt less connected with students and colleagues” (Santelli and Grissom, 2022, p. 6).

We cannot guarantee that all or most KCA staff will be comprised from current valley residents or staff who move to the valley for employment at KCA, although that is our hope. However, acceptance of the waiver request will help KCA move closer to this goal by allowing the two teachers, Melissa and Ryan, both of whom are longtime valley residents, to be temporarily categorized as licensed staff while they complete their licensure requirements, thus “freeing up” space for non-licensed teachers, all of whom live locally, to contribute to the school. It should be noted that we do not wish to limit the staff to current Illinois Valley residents; we would *love* for staff to move here for employment at KCA. What matters is consistency for the kids, who have an increased chance of success with higher teacher retention (Dykstra, D.D., 2014), which is affected by proximity to the school site and residency in the local community.

3. What are the barriers to more equitable outcomes? (E.g. mandated, political, emotional, financial, programmatic or managerial)

The Illinois Valley is an isolated, high-poverty community in Southern Oregon. Correlations between poverty and educational success are well-documented (McKenzie, 2019; Tine, 2017; Kepins, 2021). Other obstacles are rural-related; two examples are lengthy school bus commutes (i.e., Three Rivers School District buses travel 10,000 miles each day) and limited internet access (e.g., during the early stages of the pandemic, district resources necessarily prioritized providing portable hotspots to families and converting school buses into mobile internet providers). Among other barriers, physical and mental health care is difficult to

⁵ Oregon Department of Transportation (2019):

access; the Illinois Valley does not have a homeless shelter⁶; and the region's racism has long been documented (Wadewitz, 2022).

KCA's design is influenced by educational research indicating a positive correlation between student achievement and small class sizes (Shin and Chung, 2009), a focus on the arts (Scripp and Paradis, 2014), integration of place-based learning (Bolduc, 2022), use of restorative justice techniques (Darling-Hammond et al, 2020), and community collaborations (Miller, 1993).

4. How have you intentionally involved stakeholders who are also members of the communities affected by the waiver request? How do you present your information in questions (1), (2) and (3) to these stakeholders?

The primary stakeholders are enrolled students and their families. Upon enrollment, KCA teachers have been meeting with each newly enrolled family for 1-2 hours in order to build a relationship with students and their families prior to the school's opening in late August. We are forthcoming with teachers' prior experience and licensing status. To date, no family has shown concern regarding teacher licensure. Teacher backgrounds are also described in our monthly newsletter and on our website.

5. How will you modify or enhance your strategies to ensure each students' and communities' individual and cultural needs are met?

The waiver will increase the ability to hire diverse non-licensed teachers, such as the eight potential teachers who have expressed a strong interest in teaching at KCA. Student outcomes are positively impacted by being educated by teachers from underrepresented groups (Suárez, 2022). Of the currently enrolled students, 29.4% identify as LGBTQ2SIA+ and/or transgender, sharing these characteristics with two of the eight potential teachers. Additionally, all students benefit from being educated by teachers from underrepresented communities (Suárez, 2022).

6. How are you collecting data on race, ethnicity, and native language?

KCA currently collects quantitative data through enrollment forms; data from registration forms will be available beginning in May 2023; upon the school's opening, data will also be collected through annual student enrollment collections. Qualitative data is collected formally through introductory family meetings and informally through student coursework, class discussions, and student observations.

The 2023-2024 enrollment form⁷ lists five categories to voluntarily self-report:

(1) Low-income (eligible for Oregon Trail, TANF, WIC, or Oregon Health Plan; or live below the poverty line; or qualify for the USDA free or reduced lunch program)

(2) Mental or physical disability

⁶ A transitional housing project is under development, which should help. One of the newly enrolled students lived in a vehicle for two years with her mother, who described their story at length during a private meeting with KCA co-founders.

⁷ KCA Enrollment Form: <https://docs.google.com/forms/d/e/1854AtpQLSekL1SttGUZUPk-8nybgO5gEnTDcWbtkn8mnPQ0RhnzScjrYQ/viewform>

- (3) Limited English Proficiency⁸⁹
 (4) Historically oppressed race or ethnicity¹⁰
 (5) Historically oppressed sex, gender identity, or sexual orientation

7. What is your commitment to P-20 professional learning for equity? What resources are you allocating for training in culturally responsive instruction?

Professional development in Prenatal-20 and culturally responsive instruction has included, and will include, trainings from the Southern Oregon Education Services District (e.g., DEI, SIOP, Universal Design, trauma-informed practices, Equity 101/201); Resolve Center for Dispute Resolution and Restorative Justice; ODE (e.g. Supporting Gender Expansive Students Guidance 3/14/23); Transponder (training to support students in the trans/gender-diverse community); and social justice conferences (e.g. Northwest Teachers for Social Justice, Pedagogy & Theatre of the Oppressed).

Data Collection

All charter schools with approved waivers will be required to report the impact of the waiver annually to the State Board. What is the charter school's plan for collecting data on how the proposed waiver will impact students and the quality of education? The plan must minimally include disaggregated data by student demographics and stakeholder engagement.

To assess student academic outcomes in classes taught by licensed teachers in comparison to classes taught by the two teachers for whom this waiver would apply, data collection will include in-class summative assessments, mandated district and state assessments, and anonymized student feedback at the conclusion of each semester.

To assess the impact on student demographics, registration forms will collect disaggregated racial, ethnic, linguistic, sexual orientation, gender identity, mental and physical disability, and poverty data. A mid-year survey, using the same metrics, will provide regular opportunities for families to adjust their responses as needed.

Validity and reliability concerns include the small sample size (considering the school's maximum enrollment of 64), participant bias of student feedback, the short duration of the waiver period, and the limited application of the waiver to two specific teachers. These concerns will be enumerated in each annual report.

References:

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⁸ Terminology is in the process of being updated in accordance with Oregon's transition from "LEP" to Multilingual Learners" (MP) classification

⁹ Linguistic, racial, and ethnic data is disaggregated in registration forms

¹⁰ “

All charter schools with approved waivers will be required to report the impact of the waiver annually to the State Board. What is the charter school’s plan for collecting data on how the proposed waiver will impact students and the quality of education? The plan must minimally include disaggregated data by student demographics and stakeholder engagement.

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Tine, M. (2017). Growing up in rural vs. urban poverty: Contextual, academic, and cognitive differences. *Poverty, inequality and policy, 9*-22.

Wadewitz, L. K. (2022). Leveraging whiteness in settler colonial Oregon. *Reviews in American History, 50*(3), 310-316.

The State Board is interested to understand the charter school sponsor's position on the waiver request. Please include evidence that the sponsor acknowledges being notified of the waiver request and whether or not the sponsor is in favor of the request.

Included as a separate attachment

Oregon State Board of Education

April 20, 2023

AGENDA ITEM: 8.A.

<p>SUBJECT: History of Native American Mascots STAFF NAME & OFFICE: Cindy Hunt, Office of the Director and April Campbell, Office of Indian Education</p> <p>A public school may use a mascot that represents, is associated with or is significant to a Native American Tribe only if the public school enters into an approved written agreement with that federally recognized Native American Tribe. The State Board of Education shall approve an agreement if the agreement meets the requirements of ORS 332.075 and OAR 581-021-0047.</p>	<p><input checked="" type="checkbox"/> Informational Presentation</p> <p><input type="checkbox"/> Written Report</p>
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BACKGROUND

In 2012 in Oregon, seventeen school districts had schools that had Native American mascots—with names such as the “Warriors,” the “Braves,” the “Chieftains,” the “Indians,” and the “Indian Eagles.” Many of these communities also had images as part of their mascot which were meant to depict Native Americans. In all cases, the schools and communities believe they are respectfully honoring Native Americans. To suggest that such images may be offensive risked community outrage: community members believed they were unfairly being charged with being disrespectful or racist. The very topic invited passion on both sides and was divisive.

While the communities of these high schools believe they are honoring Native Americans, Oregon tribal members brought to the board concerns about the continued use of Native American mascots. There is also a growing body of social science literature and empirical research that indicates there are harmful effects of such racial stereotyping and inaccurate racial portrayals. These stereotypes are particularly harmful to the social identity development and self-esteem of American Indian young people. Research indicates that using Native Americans as mascots promotes discrimination, pupil harassment, and stereotyping.

Some Oregon tribal members viewed the mascots as creating a visible presence for Native Americans in communities. It was also believed that the mascots also serve as a catalyst for other discussions between Oregon tribes and public schools relating to tribal history and culture.

The Oregon State Board of Education has been given the responsibility by the Oregon Legislature in state statute to ensure that persons are not subjected to unlawful discrimination in our public schools on the basis of race, color, religion, sex, sexual orientation, national origin, marital status, age or disability. Native American students are also entitled to an educational environment that is not hostile and is conducive to the attainment of educational goals.

In 2012, after consideration of these issues and hearing extensive public testimony, the board adopted a resolution and a rule which prohibited public schools from using Native American

Oregon State Board of Education

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mascots on or after July 1, 2017. It is believed that the board was the first state level public governing body to take such as action.

The 2014 Legislature adopted SB 1509 (ORS 332.075(1)(g)) which provides an exception to the State Board’s mascot ban and included the following components:

- Allows districts that enter into an agreement with an Oregon federally recognized Native American Tribe to use a mascot that represents, is associated with or is significant to the tribe. Agreements must be approved by the state board.
- Directs the state board to adopt rules relating the agreement and the agreement approval process.
- Directs the state board to consult with the tribes as part of rule adoption process.
- Directs the state board to approve an agreement if the agreement meets the requirements of ORS 332.075(1)(g) and OAR 581-021-0047.

In January, 2016 the State Board of Education amended OAR 581-021-0047 based on the requirements of SB 1509. The board adopted requirements for the mascot agreements which included both process and content requirements.

Those public schools which did not enter into an agreement with a tribe continued to be required to change their mascots prior to July 1, 2017. All public schools either changed their mascots or entered into an agreement with a tribe. All agreements submitted to the board were approved by the board.

SUMMARY OF PREVIOUS BOARD ACTION

In 2017 the board approved agreements for eight school districts. The Confederated Tribes of Siletz Indians of Oregon, The Confederated Tribes of the Grand Ronde and The Cow Creek Band of Umpqua Indians entered into agreements with school districts. The time peiord of the agreements was between 5 and 10 years.

Below is a summary of the agreements that were entered into for five years in 2017 and that may be up for renewal:

1. Philomath School District and Siletz Tribe(two agreements – high school and middle school)
2. Banks School District and Grand Ronde Tribe
3. Siletz Valley Charter School and Siletz Tribe
4. Amity School District and Siletz Tribe
5. Rogue River School District and Siletz Tribe

The following school districts and tribes also entered into agreements:

Oregon State Board of Education

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1. Roseburg School District and Cow Creek Tribe (10 Years)
2. Scappoose School District and Grand Ronde Tribe (8 years)
3. Molalla School District and Grand Ronde Tribe (10 Years)

POLICY ISSUE OR CONCERNS

Does the board wish to amend OAR 581-021-0047?

Staff is not recommending any amendments.

What is the status of the agreements and mascots in the five school districts who entered into agreements which were valid for five years?

Staff is recommending that we reach out to the school districts with agreements and request a report on the status of their mascot and agreement.

What will be the board process for any agreements that are renewed and require approval?

The board previously used a checklist prepared by staff to determine if an agreement should be approved.

Each agreement was considered on the board agenda as a first reading and then subsequently for approval. It is anticipated that the renewed agreements could be in front of the board for consideration in the fall, 2023.

EQUITY IMPACT ANALYSIS

Since the board amended the Native American mascot rule in 2016 progress has made regarding fully leveraging the strengths, assets and contributions our Native American student bring to their communities. ODE has created the Office of Indian Education to focus on Native American students. And the recommended goals and objectives of the AI/AN Student Success Plan were updated for 2020-25.

In 2017, the Oregon Legislature enacted Senate Bill (SB) 13, now known as **Tribal History/Shared History**. This law directs the Oregon Department of Education (ODE) to create K-12 Native American Curriculum for inclusion in Oregon public schools and provide professional development to educators. The law also directs the ODE to provide funds to each of the nine federally recognized tribes in Oregon to create individual place-based curriculum.

Native Americans lived in this state since time immemorial, long before it became Oregon. How can we teach youth about Oregon history without including the voice of Oregon's Native American peoples – both past and present? This general lack of knowledge about Native American people extends to curricula - thus the need for Tribal History/Shared History. Currently, ODE includes required teaching about Native Americans in ODE's Social Studies State

Oregon State Board of Education

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Standards. Tribal History/Shared History will create opportunities to expand those requirements across multiple content areas.

FISCAL ANALYSIS

There is a cost to those districts and tribes that choose to negotiate written agreements as it is anticipated that this process will require staff time and consultation with legal counsel. Also, depending on the provisions of the agreement, there may be a cost to both districts and tribes for implementation. There is also a cost to school districts who choose to change their mascots.

ATTACHMENTS

Attachment 1: Statute and rule related to mascots

Statutes and Rules related to mascots

332.075 Powers of board; rules. (1) Any district school board may:

(a) Fix the days of the year and the hours of the day when schools shall be in session.

(b) Adopt textbooks and other instructional materials as provided in ORS 337.120 and 337.141 and courses of study for the use of such schools as provided in ORS 336.035.

(c) Authorize the use of the schools for purposes of training students of an approved educator preparation provider, as defined in ORS 342.120, and for such purposes may enter into contracts with the approved educator preparation provider on such terms as may be agreed upon. Such contracts as they relate to student teachers shall have the same effect and be subject to the same regulations as a contract between a licensed teacher and a district school board.

(d) Develop and operate with other school districts or community college districts secondary career and technical education programs for pupils of more than one district and fix by agreement the duration of the district's obligation to continue such activity, subject to the availability of funds therefor.

(e) Authorize the school district to be a member of and pay fees, if any, to any voluntary organization that administers interscholastic activities or that facilitates the scheduling and programming of interscholastic activities only if the organization:

(A) Implements equity focused policies that:

(i) Address the use of derogatory or inappropriate names, insults, verbal assaults, profanity or ridicule that occurs at an interscholastic activity, including by spectators of the interscholastic activity;

(ii) Prohibit discrimination as defined in ORS 659.850;

(iii) Permit a student to wear religious clothing in accordance with the student's sincerely held religious belief and consistent with any safety and health requirements; and

(iv) Balance the health, safety and reasonable accommodation needs of participants on an activity-by-activity basis;

(B) Maintains a transparent complaint process that:

(i) Has a reporting system to allow participants of interscholastic activities or members of the public to make complaints about student, coach or spectator behavior;

(ii) Responds to a complaint made under sub-subparagraph (i) of this subparagraph within 48 hours of the complaint being received; and

(iii) Strives to resolve a complaint received under sub-subparagraph (i) of this subparagraph within 30 days of the complaint being received;

(C) Develops and implements a system of sanctions against schools, students, coaches and spectators if a complaint made under subparagraph (B) of this paragraph is verified; and

(D) Performs an annual survey of students and their parents to understand and respond to potential violations of equity focused policies adopted under subparagraph (A) of this paragraph or violations of ORS 659.850.

(f) Accept money or property donated for the use or benefit of the school district and, consistent with the laws of this state, use such money or property for the purpose for which it was donated.

(g) Enter into an approved written agreement with the governing body of a federally recognized Native American tribe in Oregon to allow the use of a mascot that represents, is associated with or is significant to the Native American tribe entering into the agreement. An agreement entered into under this paragraph must:

- (A) Describe the acceptable uses of the mascot;**
- (B) Comply with rules adopted by the State Board of Education that:**
 - (i) Are adopted after consultation with the federally recognized tribes in Oregon pursuant to ORS 182.164 (3); and**
 - (ii) Prescribe the requirements for approval; and**
- (C) Be approved by the State Board of Education, which the board must provide if the agreement meets the requirements of this paragraph and the rules adopted under this paragraph.**

(2) All contracts of the school district must be approved by the district school board before an order can be drawn for payment. If a contract is made without the authority of the district school board, the individual making such contract shall be personally liable.

(3) Notwithstanding subsection (2) of this section, a district school board may, by resolution or policy, authorize its superintendent or the superintendent's designee to enter into and approve payment on contracts for products, materials, supplies, capital outlay, equipment and services that are within appropriations made by the district school board pursuant to ORS 294.456. A district school board may not authorize its superintendent or the superintendent's designee under this subsection to enter into and approve payment on contracts that are collective bargaining agreements or service contracts that include the provision of labor performed by employees of the school district.

581-021-0047

Prohibits Public Schools from using Native American Mascots

(1) As used in this section:

(a) "Federally recognized Native American Tribe" means the following:

(A) The Confederated Tribes of the Warm Springs Indian Reservation.

(B) The Confederated Tribes of the Umatilla Indian Reservation.

(C) The Burns-Paiute Tribe.

(D) The Confederated Tribes of Siletz Indians of Oregon.

(E) The Confederated Tribes of the Grand Ronde.

(F) The Cow Creek Band of Umpqua Indians.

(G) The Confederated Coos, Lower Umpqua and Siuslaw Tribes.

(H) The Klamath Tribe.

(I) The Coquille Tribe.

(b) "Native American mascot" means a name, symbol or image that depicts or refers to an American Indian Tribe, individual, custom or tradition that is used by a public school as a mascot, nickname, logo, letterhead or team name.

(c) "Public school" means a school or program operated by a school district, education service district or public charter school.

(2) To ensure that all public schools are in compliance with ORS 659.850 which prohibits discrimination in public schools, on or after July 1, 2017, the use of any Native American mascot by a public school is prohibited. This prohibition includes the use of team names such as "Redskins," "Savages," "Indians," "Indianettes," "Chiefs," "Chieftains," and "Braves," except as provided in subsection (4).

(3)(a) A public school may continue to use the team name "Warriors" as long as it is not combined with a symbol or image that depicts or refers to an American Indian Tribe, individual, custom or tradition. This paragraph does not apply to those public schools that enter into agreements pursuant to subsection (4) of this section.

(b) Except as provided in subsection (4) of this section, a public school may continue to use a mascot that may be associated with Native American culture, custom or tradition if the mascot depicts an animal or other image that is not an individual. Examples of such mascots include team names and images such as the "Thunderbirds", "White Buffalo" and "Eagles."

(4)(a) Pursuant to ORS 332.075, a public school may use a mascot including those prohibited under section (2) that represents, is associated with or is significant to a Native American Tribe only if the public school enters into an approved written agreement with that federally recognized Native American Tribe in Oregon that meets the requirements of this subsection.

(b) A mascot may only be considered under this subsection to represent, be associated with or be significant to a tribe if all of the following requirements are met:

(A) The tribe entering into the agreement determines that the district's mascot represents, is associated with or is significant to the tribe; and

(B) The public school at which the mascot is used is located within the traditional area of interest of the tribe that enters into the agreement.

(c) Any agreement entered into under this subsection shall only be in effect if the public school continues to use a mascot that represents, is associated with or is significant to the Native American Tribe. Nothing in this subsection shall be construed to prevent a public school from changing their mascot to one that is not a Native American mascot.

(d) At least 60 days prior to entering into an agreement under this subsection, a public school must notify the State Board of Education as to which tribe the public school is intending to enter into an agreement with regarding the use of a mascot. If the public school does not enter into an agreement with the tribe listed in the notice, the public school may not enter into an agreement with another tribe relating to the mascot for five years from the date of the notice to the State Board of Education.

(e) A public school must conduct a public hearing relating to the agreement and give opportunity for members of the public to provide written and oral comments to the public school about the agreement. The public hearing must be conducted prior to the public school entering into the agreement.

(f) To be a valid agreement under ORS 332.075 and this rule, an agreement entered into under this subsection must:

- (A) Be approved by the board of the public school and contain the signature of the board chairperson;
 - (B) Be approved by the tribal government of a Native American Tribe and contain the signature of the chairperson of the tribal council or other tribal leader designated by the tribe; and
 - (C) Be approved by the State Board of Education.
- (g) An agreement entered into under this subsection must contain a declaration by the tribe that the mascot represents, is associated with or is significant to the tribe and at a minimum:
- (A) A description of the acceptable uses of the mascot that the public school is using. The description must include the name of the mascot and pictures depicting any image, logo or letterhead that is deemed as an acceptable use;
 - (B) A description of how American Indian/Alaska Native history and culture will be included in the curriculum of the public school;
 - (C) A description of how the agreement will be enforced both between the school and tribe and within the public school;
 - (D) The time period of the agreement which may not exceed 10 years;
 - (E) A review of the agreement by the tribe and public school at least once every five years;
 - (F) A description of how disputes and complaints relating to the agreement will be resolved;
 - (G) The process for renewal of the agreement which must include approval by the public school governing body, tribal government and State Board of Education and be consistent with this subsection;
 - (H) A copy of school policies adopted in accordance with ORS 339.356 that address complaints based on harassment, intimidation or bullying and cyberbullying and a description of how the policies are distributed to parents and students who attend the public school; and
 - (I) A copy of school policies adopted in accordance with OAR 581-021-0049 that address complaints based on race, color, religion, sex, sexual orientation, national origin, marital status, age or disability and a description of how the policies are distributed to parents and students who attend the public school;
- (h) The State Board of Education shall approve an agreement if the agreement meets the requirements of ORS 332.075 and this rule.
- (i) A tribe that previously entered into an agreement may revoke the agreement prior to the end of the agreement. The tribe shall inform the State Board of Education of the revocation within fifteen (15) days of revocation.
- (5) Nothing in this rule shall be construed to prohibit a public school from:
- (a) Displaying art work, historical exhibits or other cultural educational exhibits or conducting educational programs related to Native Americans as long as the display or program is not associated with a Native American mascot. The display or program may be associated with a Native American mascot if the public school has entered into an agreement with a Native American tribe under this section and the display or program is allowed under the agreement;

(b) Honoring the contributions of Native Americans by naming a school, building or program after a Native American.

(6) Each school district, education service district or sponsor of a public charter school shall notify:

(a) On or before January 1, 2013, the Department of Education if any school operated by the district or sponsor uses a Native American Mascot; and

(b) On or before July 1, 2017, the Department of Education when a new mascot is adopted for the public school.

(7) The Superintendent of Public Instruction shall find any school district, education service district or public charter school that violates this section to be in noncompliance with the discrimination prohibitions under ORS 659.855. Pursuant to ORS 659.855, the Superintendent may immediately withhold all or part of state funding from the school district, education service district or public charter school.

Statutory/Other Authority: ORS 326.051, 659.850 & 659.855

Oregon State Board of Education

April 20, 2023

AGENDA ITEM: 8.B.

<p>SUBJECT: Update on Integrated Plans and Applications STAFF NAME & OFFICE: Scott Nine, Office of Education, Innovation and Improvement</p> <p>With the March application window closed, ODE staff will share an update on the status of application review, the work to support the co-development of longitudinal performance growth targets, and other highlights and information from the implementation of Integrated Guidance.</p>	<p><input checked="" type="checkbox"/> Informational Presentation</p> <p><input type="checkbox"/> Written Report</p>
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BACKGROUND

1. History:
 - a. What prompted this update to the board?
 - i. The board's recently adopted strategic plan calls for "regular updates on the implementation of the Department's Integrated Guidance." The board also called for an informational presentation on "performance frameworks" within the [Integrated Guidance](#) (IG) - including Longitudinal Performance Growth Targets (LPGTs), progress markers, and local optional metrics.
2. Purpose
 - a. What function does this policy or update hold?
 - i. How long has this policy in place?
 1. Office of Education, Innovation and Improvement was established in July 2019 as part of the passage of the Student Success Act. We released Integrated Guidance for Six ODE Initiatives in February 2022. The application submission process started on March.1st, 2023 and closed on March.31st, 2023. Now we are at a key point of reviewing all submitted applications before moving toward co-development of Longitudinal Performance Growth Targets and finalizing performance frameworks as final inputs into grant agreements.
3. Does the board have any areas of discretion on this policy and/or update?
 - a. The board has adopted several rules that support and/or could shape Integrated Guidance implementation overtime. The guidance is rooted to statute which is set by the Legislature.
4. Community partner voice/input (individual and collective i.e., groups) - **N/A**
 - a. Who was involved in bringing this to the Board?
 - b. What did engagement in this process entail?
 - c. Who may be affected by this?
 - d. Whose voice is missing?
 - e. What more information does the Board need prior to moving forward?

Oregon State Board of Education

April 20, 2023

AGENDA ITEM: 8.B.

SUMMARY OF PREVIOUS BOARD ACTION

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

Via prior rule adoptions, the board has heard updates on SIA implementation, HSS implementation, and one prior informational on the Integrated Guidance at the time of its release in February 2022.

POLICY ISSUE OR CONCERNS --- Not applicable to current update

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

- ~~1. Stakeholders
 - a. How have you intentionally involved stakeholders who are also members of communities affected by this rule?
 - b. Who are the historically underserved groups affected?
 - c. Has there been consultation or collaboration with tribes in this rule change or policy decision?
 - d. How has the Oregon Department of Education modified or enhanced the rule change or policy decision to address the needs of historically underserved communities?~~
- ~~2. Negative/Positive Effects
 - a. What is the impact on the population most affected by this rule that the board should consider?
 - b. What possible opportunities, assets or access could this rule provide?
 - c. What is the impact on eliminating the opportunity or achievement gap?
 - d. Have all the potential unintended consequences been considered?
 - e. Does this rule advance the ESSA goals?~~
- ~~3. What are the barriers to more equitable outcomes, either:
 - a. State or federally mandated?
 - b. Political?
 - c. Emotional?
 - d. Financial?
 - e. Programmatic?
 - f. Language?
 - g. Geography?~~

EQUITY IMPACT ANALYSIS --- Not applicable to current update

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

Oregon State Board of Education

April 20, 2023

AGENDA ITEM: 8.B.

1. ~~How are historically underserved populations impacted by this docket item?~~
 - a. ~~Demonstrate how the rule changes, policy, or action could produce other unintended consequences not listed in the docket.~~
 - b. ~~Refer to *Policy Issue or Concerns* and identify the historically underserved populations affected. Conduct a reflection and examination, which will and should answer 1a.~~

2. ~~Examine the potential impact of the rule changes, policy, or action on historically underserved populations in Oregon. Describe this ongoing and/or foreseeable impact, using as much detail as possible.~~

3. ~~Explain how the rule change, policy or action works toward improving achievement, opportunities and a sense of worthiness for underserved students?~~

FISCAL ANALYSIS --- Not applicable to current update

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

ATTACHMENTS

Attachment 1:



Aligning for Student Success

An Implementation Update

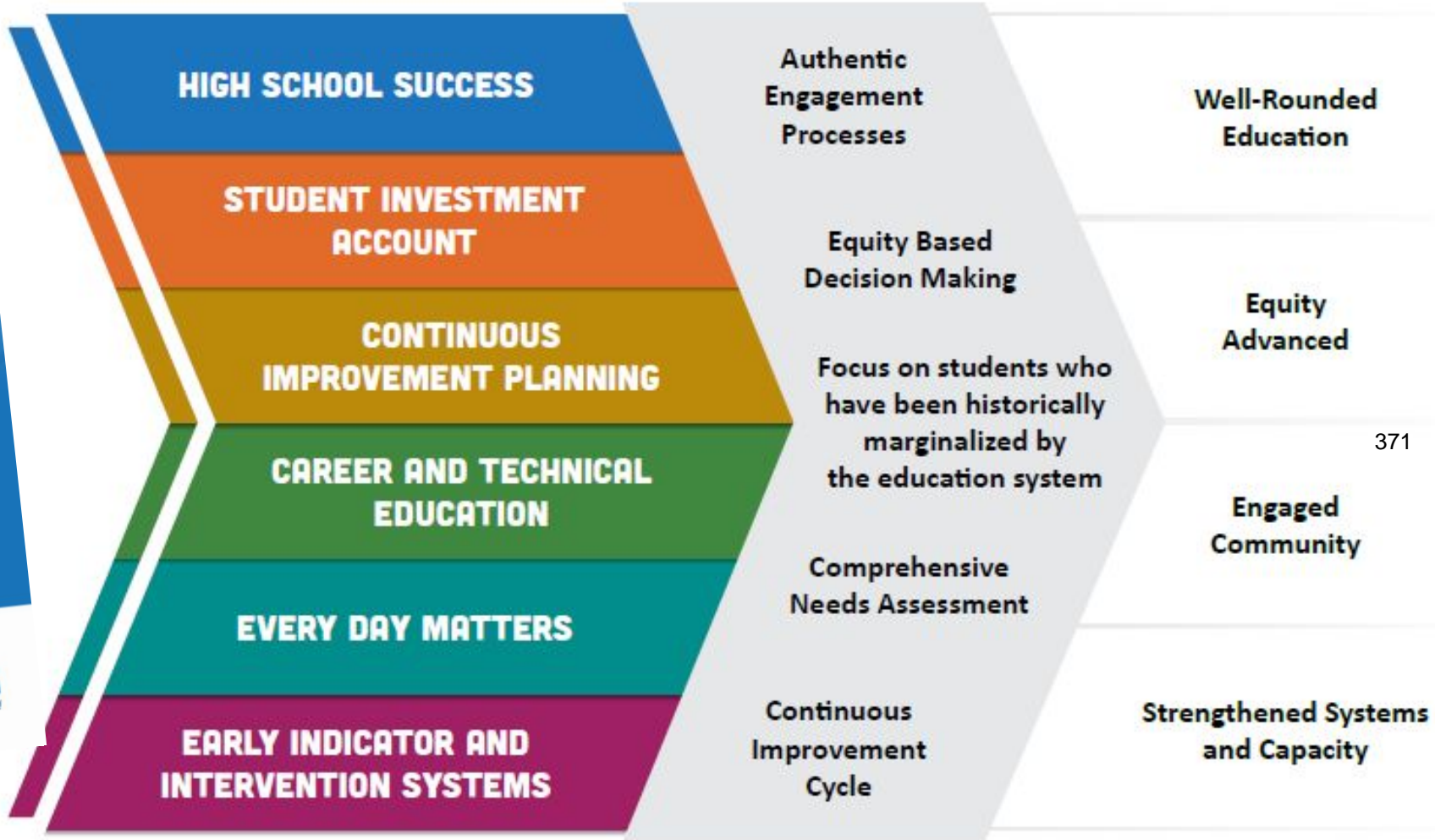
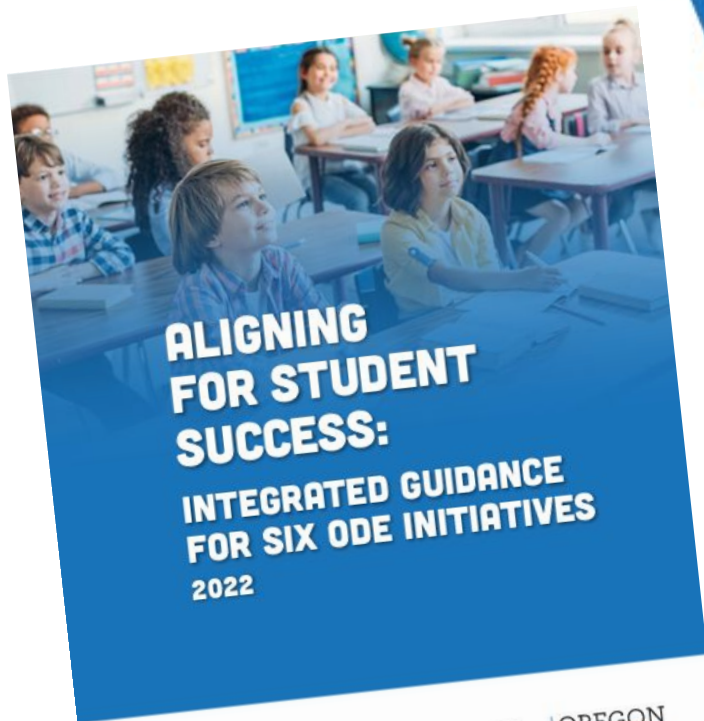
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Scott Nine
Office of Education Innovation and Improvement
Thursday, April 20, 2023

Program

Common Elements

Common Goals



SECTION 1: INTEGRATING SIX PROGRAMS



SECTION 2: EFFECTIVE PLANNING



SECTION 3: FINANCIAL STEWARDSHIP



SECTION 4: PREVIEW OF THE INTEGRATED APPLICATION



SECTION 5: HOW APPLICATIONS WILL BE REVIEWED, EVALUATED, DEVELOPED, AND FINALIZED



SECTION 6: MEANINGFUL REPORTING, MONITORING, AND EVALUATION PROCESSES



SECTION 7: GETTING BETTER: SUPPORT AND IMPROVEMENT OPPORTUNITIES AND EXPECTATIONS



IMPLEMENTING WITH A BUDGET SHORTFALL SUPPLEMENTAL INTEGRATED GUIDANCE 2022



TARGETED UNIVERSALISM AND SNAPSHOTS OF FOCAL STUDENT GROUPS



LEVELS OF COMMUNITY ENGAGEMENT

IGNORE	INFORM	STANCE TOWARDS COMMUNITY			DEFER
		CONSULT	INVOLVE	COLLABORATE	
INTENTION & UNINTENDED IMPACT TO CONSIDER					
Protecting School, District, Regional or other community interests. Unintended impact to Consider: Misrepresentation of Community Stakeholders	Keeping Communities Informed. Unintended impact to Consider: Misrepresentation of Community Stakeholders	Reaching Community Interest. Unintended impact to Consider: Community Engagement	Meaningfully Engaging Community Interest. Unintended impact to Consider: Community Engagement	Collaborating and Sharing Power with Community. Unintended impact to Consider: Collaborative Power Overlaid by Power Dynamics & Lack of Mutual Trust	Community Drive and Ownership. Unintended impact to Consider: Community Power Overlaid by Power Dynamics and Ownership
COMMUNITY ENGAGEMENT GOALS					
Deny access to decision-making processes	Provide students, families & community with relevant information for shared support district, school or regional goals	Gather input from students, families & community without an opportunity for shared decision-making	Ensure students, families & community needs and interests are integrated into support processes & planning	Ensure students, families & community actively participate in decision-making	Foster lasting educational results through community-driven initiatives that are culturally rooted and responsive to whole and emerging people and communities.
EXAMPLE ENGAGEMENT METHODS					
<ul style="list-style-type: none"> Closed door meeting Misinformation Minimal effort to avoid engagement 	<ul style="list-style-type: none"> Fact sheets Open houses Presentations Billboards or school electronic boards Video Social media posts 	<ul style="list-style-type: none"> Input sessions Focus groups or listening responses Surveys 	<ul style="list-style-type: none"> Collaboration or engagement with community regarding and community roles Interactive workshops & town hall Community Advisory Committees 	<ul style="list-style-type: none"> MOUs with Community-based Organizations Leadership Development Resource B. Funding allocated to community engagement Collaborative design and facilitation of community activities Community Advisory Committees 	<ul style="list-style-type: none"> Community-driven planning Student or Parent-led Community Service Participatory Action Research and community-driven initiatives Participatory budgeting Community school
KEY EXAMPLE STRATEGY TO CONSIDER FOR ENGAGEMENT METHODS					
Establish why the community is composed of	Language Accessibility	Hospitality and reciprocity practices	Staff training on community listening and reciprocity practices	Develop strategy and local community-based organizations (e.g., youth groups, churches, etc.)	Allocate strategy and resources for community-driven projects and use
HOW COMMUNITY ENGAGEMENT COULD BEST FIT INTO OUR PLAN					
Focal student groups not acknowledged in our plan	Communities informed that integrated planning is occurring but not engaged in the process	Plans including (disaggregated data) are used to inform decisions	Input/consultation and engagement is central to the development of decisions	Knowledge with community-based organizations, members, and other agencies	Task forces and committees with decision-making power
Experiences of color, language, and ability are not considered in our plan	Communities are only engaged if they are invited	Communities are only engaged if they are invited	Communities are only engaged if they are invited	Partnerships are created that are not shared through reciprocity and shared work	Partnerships are created that are not shared through reciprocity and shared work

Real Talk

The aim of this session is to work through:

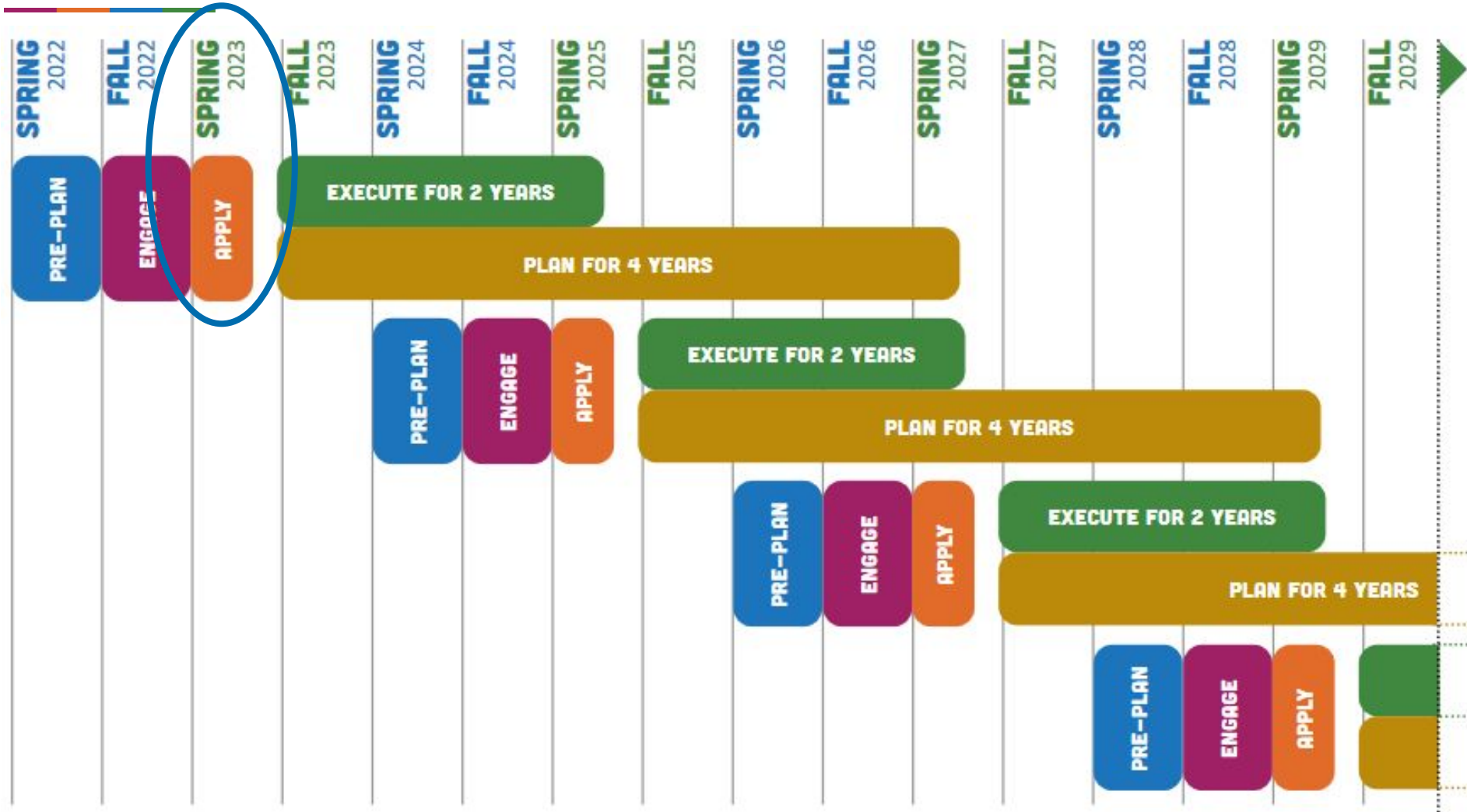
- Where are we in the big picture of overall implementation
- Status updates and windows into the agency review process
- Understanding Longitudinal Performance Growth Targets (LPGTs), co-development, and setting a “performance framework”
- What’s on the horizon
- Awareness of the supports and resources in place
- Your questions

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#WholeTeamEffort

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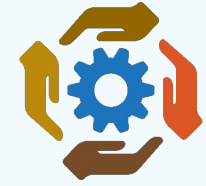
Where are we in the big picture?



Application Review Process



Where are we in the review process?



As of yesterday, 4/19 . . .

- 222 applications submitted covering 100% of students in Oregon from every possible grantee eligible for funding under any of the six initiatives
- ODE has completed an initial intake process for every application received
- Staff reviewers have completed joint assessments and budget reviews on 141 applications
- 36 applications have been presented and moved through the quality assurance and learning panels
- Our first sessions are being scheduled to support the co-development of longitudinal performance growth targets

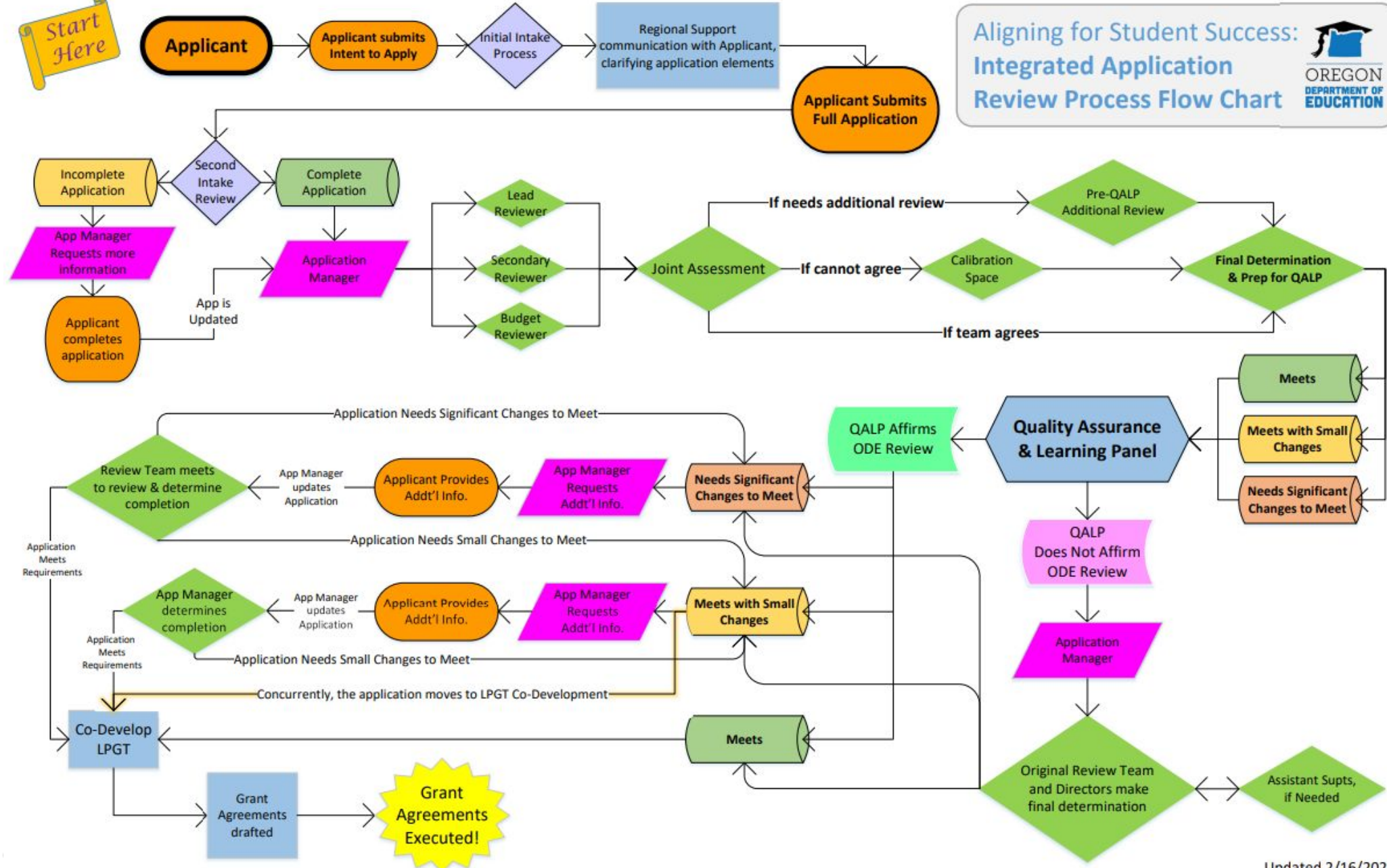
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Start Here

Aligning for Student Success:
Integrated Application Review Process Flow Chart



OREGON DEPARTMENT OF EDUCATION



Application to Agreement

March

Range from March through August(ish)

Submit Application and Draft Targets

Application Reviewed by the ODE

Co-Development of Targets Begins

ODE Initiates Grant Agreement Process

Public Review of Grant Agreement & Board Approval

Submit Document. of Board Approval^{§79}

Input your **draft** targets with your complete Application during submission window: March 1-31, 2023

Your application (without LPGTs) is reviewed by the ODE

Once your application meets all requirements, we will contact you to begin co-development

ODE will initiate the grant agreement process that includes the co-developed targets

Applicants must post on webpage & make available in district office. Grant agreement must be presented and approved at an open board mtg

Grant agreement is finalized and fully executed with ODE and applicant

So, what are we reviewing?

- The guidance is a comprehensive unpacking of this question
- We've published [evaluation criteria](#) that gets to the essence of what we are looking for, holistically, as applicants respond to questions, demonstrate they've met planning and engagement requirements, and share their integrated plans and budgets. Some of the requirements to highlight:
 - Use of an Equity Lens
 - Focal Student, Family, Staff, and Community Engagement
 - Tribal Consultation
 - Comprehensive Needs Assessment
 - Consideration of the Quality Education Model (QEM) Best Practices
 - Reviewing and Using Regional CTE Consortia Inputs
 - Development of a four-year plan with clear Outcomes, Strategies, and Activities
- Budgets are reviewed for allowable use.

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Single Integrated Planning and Budget Template

IntegratedPlanningandBudgetTemplate .XLSX ☆ ↻ ↺

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A1 fx Integrated Planning & Budget Template Technical Guide

	A	B	C	D	E	F	G	H				
1	Integrated Planning & Budget Template Technical Guide											
2	OUTCOMES & STRATEGIES					CSI/TSI	CTE	EIIS	HSS	SIA	ACTIVITIES	
3	Outcome-SAMPLE	SD achieves at least a 93% graduation rate across all demographic groups.										OUTCOME ACTIVITIES: ENTER ON BUDGET TAB
4	S1	Fully implement a K-12 Multi-Tiered System of Support (MTSS) and reduce class size to close the opportunity and achievement gap.							X		X	
5	S2	Implement culturally-responsive pedagogy and curriculum for equitable learning outcomes for all.					X				X	
6	S3	Provide equitable access to social, behavioral and mental health supports.					X				X	
	Outcome-A											OUTCOME ACTIVITIES: ENTER ON BUDGET TAB
8	S1											
9	S2											
10	S3											
	Outcome-B											OUTCOME ACTIVITIES: ENTER ON BUDGET TAB
12	S1											
13	S2											
14	S3											
	Outcome-C											OUTCOME ACTIVITIES: ENTER ON BUDGET TAB
16	S1											
17	S2											
18	S3											
	Outcome-D											OUTCOME ACTIVITIES: ENTER ON BUDGET TAB
20	S1											
21	S2											
22	S3											
	Outcome-E											OUTCOME ACTIVITIES: ENTER ON BUDGET TAB
24	S1											
25	S2											
26	S3											
	Outcome-F											OUTCOME ACTIVITIES: ENTER ON BUDGET TAB
28	S1											
29	S2											
30	S3											
31	Outcome-G											

+ ☰ Planning Budget 23-24 Budget 24-25 Additional & Tiered Planning Codes Example Outcomes, Strategies, a

OUTCOMES:
The changes in health, behavior, actions, attitudes, or policies that impact students, educators, people, groups and organizations with whom your work is in relationship

STRATEGIES:
Support your long-term outcomes and describe the approach you are planning to take

IG pp. 44–45

As Reviewers...

We Can (and should):

- Accept various forms of style and formatting for questions, including responses not in complete sentences
- Accept brevity-- did they address the criteria? (word count does not matter)
- Accept word choice that doesn't match ours or answers that don't use buzz words
- Accept honest answers
- Accept answers that appear in other parts of the application (holistic approach)
- Trust our colleagues during their portion of the review
- Look for justification of spending choices

We Cannot (and should not):

- Evaluate an application based on how *we think* they should have answered the question, spent the money, or prioritized focal groups
- Evaluate an application where it's not supposed to be evaluated
- Incorporate personal bias
- Include information about a recipient that we know from outside of the application in the evaluation process
- Assess application for not incorporating all community engagement feedback in their plan.

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Deep Dive: Community Engagement Artifacts

Meets Requirements:

- Grantee acknowledges and identifies engagement with student focal groups as shown in their data visualizations.
- Grantee provides artifacts that show that communities, focal groups, and families were engaged to inform on the integrated plan.
- Artifacts show that the grantee used at least two strategies to engage community and focal groups.

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Does Not Meet Requirements:

- Grantee does not provide any artifacts.
- Grantee does not show evidence of consulting their community and focal students and/or families in their community engagement artifacts.
- Grantee does not acknowledge or identify student focal groups as shown in their data visualizations.
- Grantee only submits artifacts demonstrating one strategy that was used to engage community and focal groups.

As Reviewers...

We Can (and should):

- Review the artifacts to ensure they reflect their community engagement strategies.
- Guide evaluation by asking, is this a meaningful attempt at community engagement?
- Look at the application as a whole, including the narrative.
- Accept some community engagement efforts may not have been successful
- Ensure two strategies have been utilized

We Cannot (and should not):

- Evaluate artifacts in silos
- “Score” them using the community engagement spectrum
- Assess if engagement was successful³⁸⁴
- Evaluate based on if it was the type of engagement that we want to see
- Maintain a standard of highest level of excellence

Process for Sharing Individual Reviews

- The Joint Assessment Determination meeting begins with Lead and Secondary Reviewers each sharing any criteria from their individual reviews they marked as not meeting. See if consensus between the reviewers can be met regarding any criteria that do not meet. [Protocol on next slide].
- The Budget Reviewer listens to the Lead and Secondary Reviewer's conversation and then shares their own budget review criteria, focusing again on criteria that are not meeting.
- Consensus is documented by Lead and Secondary Reviewers having identical individual reviews. *Reviewers will need to physically make changes to their individual assessment to make them identical.*

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Deeper Dive on Application Determinations

Understanding the three determination differences and nuances

- ★ **Meets Requirements-** *If affirmed by QALP, the application will be moved on to LPGT Co-Development.*
- ★ **Meets with Small Changes** *-An application that meets with small changes is one in which corrections are generally technical items that can be made via the application manager with support from the reviewers when needed. If affirmed by QALP, the application will be moved on to LPGT Co-Development.*
- ★ **Needs Significant Changes to Meet-** *An application that needs significant changes to meet is one that needs to be re-reviewed for substantive items such as community engagement or focal student groups. If affirmed by QALP, additional information provided by the applicant will be re-reviewed by the original reviewer team until the application meets/meets with small changes and then can be moved on to LPGT Co-Development.*

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Quality Assurance and Learning Panels

Feedback from volunteer panelists on their learning:

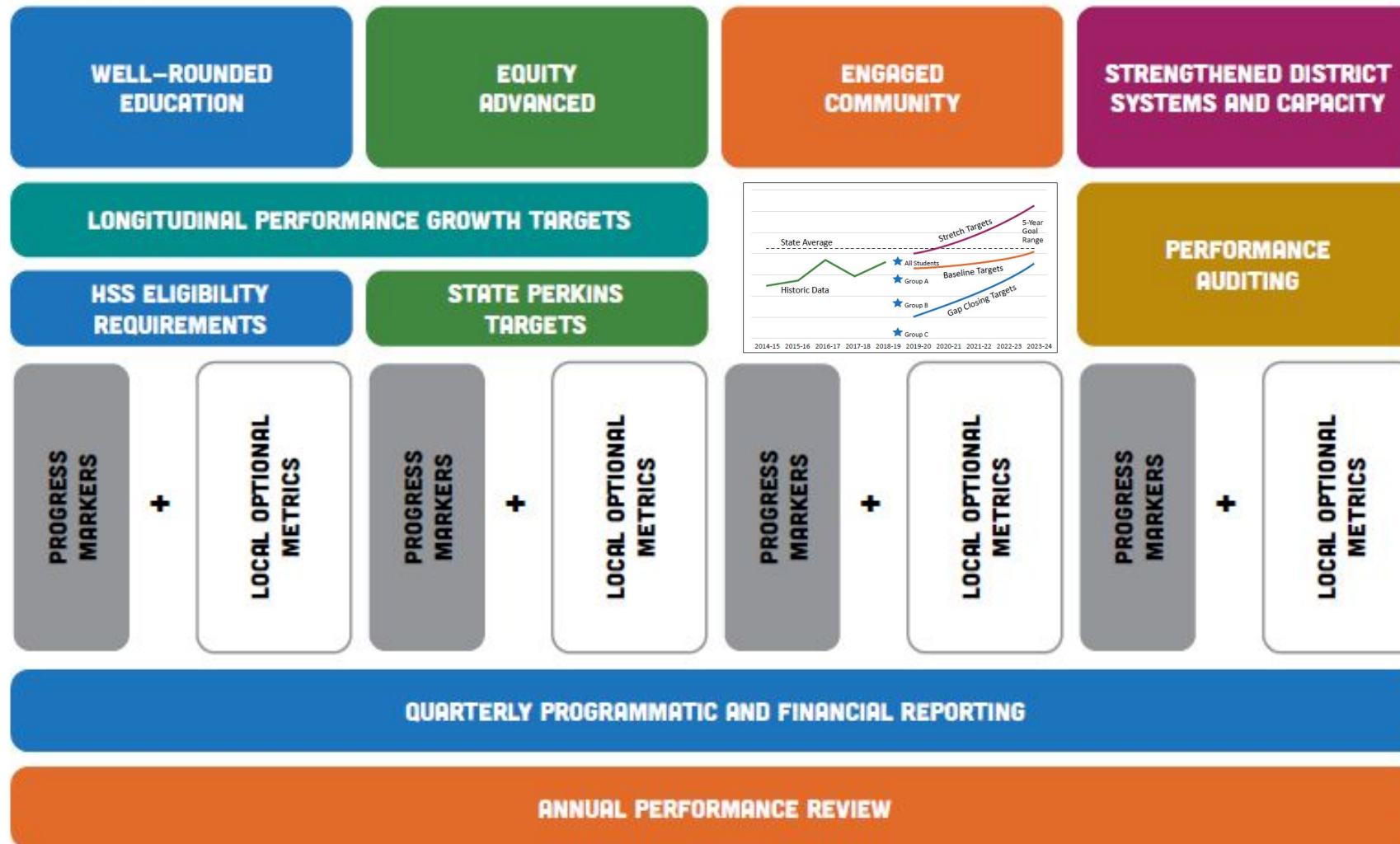
“[I’m learning] that there are sustainable checks and balances along with the huge outpouring of guidance, coaching, and support to increase district success which translates into empowering rural students to rise!”

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60 panels and 300 volunteer panelists

“I appreciated hearing how carefully ODE teams reviewed each application and developed background knowledge of the districts with which they were working.”

Understanding growth targets and setting a “performance framework”



How do we know what we know?



“Working together we can avoid accountability pitfalls experienced in No Child Left Behind, Race to the Top, education compacts, and other education initiatives over the last few decades...

Previous accountability measures often served to narrow the curriculum, using shame and blame of schools as an overly simplistic tactic while offering over-promised or oversimplified outcomes.”

LPGTs:

There is no single formula for setting these targets, as investments in programs and interventions will vary from district to district.

-[Integrated Guidance](#), p 155

Longitudinal Performance Growth Targets (LPGTs)

ODE shall collaborate with the grant recipient to develop applicable Longitudinal Performance Growth Targets, based on:

- Data available for longitudinal analysis;
- Guidance established by the department; and
- Use the following applicable metrics for the overall population and disaggregated:
 - **Third-grade reading proficiency rates measured by ELA**
 - **Ninth-grade on-track rates**
 - **Regular attendance rates**
 - **Four-year or on-time graduation rates**
 - **Five-year completion rates**
 - Other local metrics may be used to develop applicable performance growth targets.

Referred to as
"5 Common Metrics"

Data Visualizations

Updated data visualizations were sent via secure file transfer in late February

- Suppressed PDF version for public presentations and spreadsheet version with both suppressed and unsuppressed data
- Five years of data for the five common metrics (9th grade on track, regular attenders, etc.)
- Contain 2021-22 4 year cohort graduation and 5 year cohort completion rates
- Add in a combined focal student group for gap-closing target setting
 - Uses new definition of Students Navigating Poverty
- Reflect how you are in consortium based on the Intent to Apply (independent charters will not be included in school district data, districts working together will have data combined)

**Student Group Data
for
5 Common Metrics**

4 Year Graduation: 2016-17 - 2020-21 (pages 2 - 4)
5 Year Completion: 2016-17 - 2020-21 (pages 5 - 7)
9th Grade on Track: 2016-17 - 2021-22 (pages 8 - 10)
Regular Attenders: 2016-17 - 2021-22 (pages 11 - 14)
3rd Grade ELA: 2015-16 - 2021-22 (pages 15 - 17)

UNSUPPRESSED

These data are provided to increase shared understanding and support engagement with communities, particularly focal student groups and their families, to establish and maintain a strategic plan to support student learning, well-being, and development. The data will also be useful to inform the development of Longitudinal Performance Growth Targets.

The Integrated Guidance For Six ODE Initiatives (<https://www.oregon.gov/ode/student-success/pages/innovation-and-improvement.aspx>) has more information on effective use of these data as well as a better picture of the challenges that focal group students face in their educational journey.

Each applicant under the integrated guidance is required to review disaggregated data in this form as part of their planning process.

Each file will either have suppressed or unsuppressed data: suppressed data are ready for conversations with the public (can be used in community engagement, board presentations, etc.) while **unsuppressed data contains potentially identifiable information that is not for public use.** Unsuppressed data must only be shared securely on a "need to know" basis, and needs to be stored in secure locations.

See the end notes (page 18) to understand the data sources, how suppressed information is displayed (06%/4%), student group inclusion rules, and why you have missing data for some indicators/years.

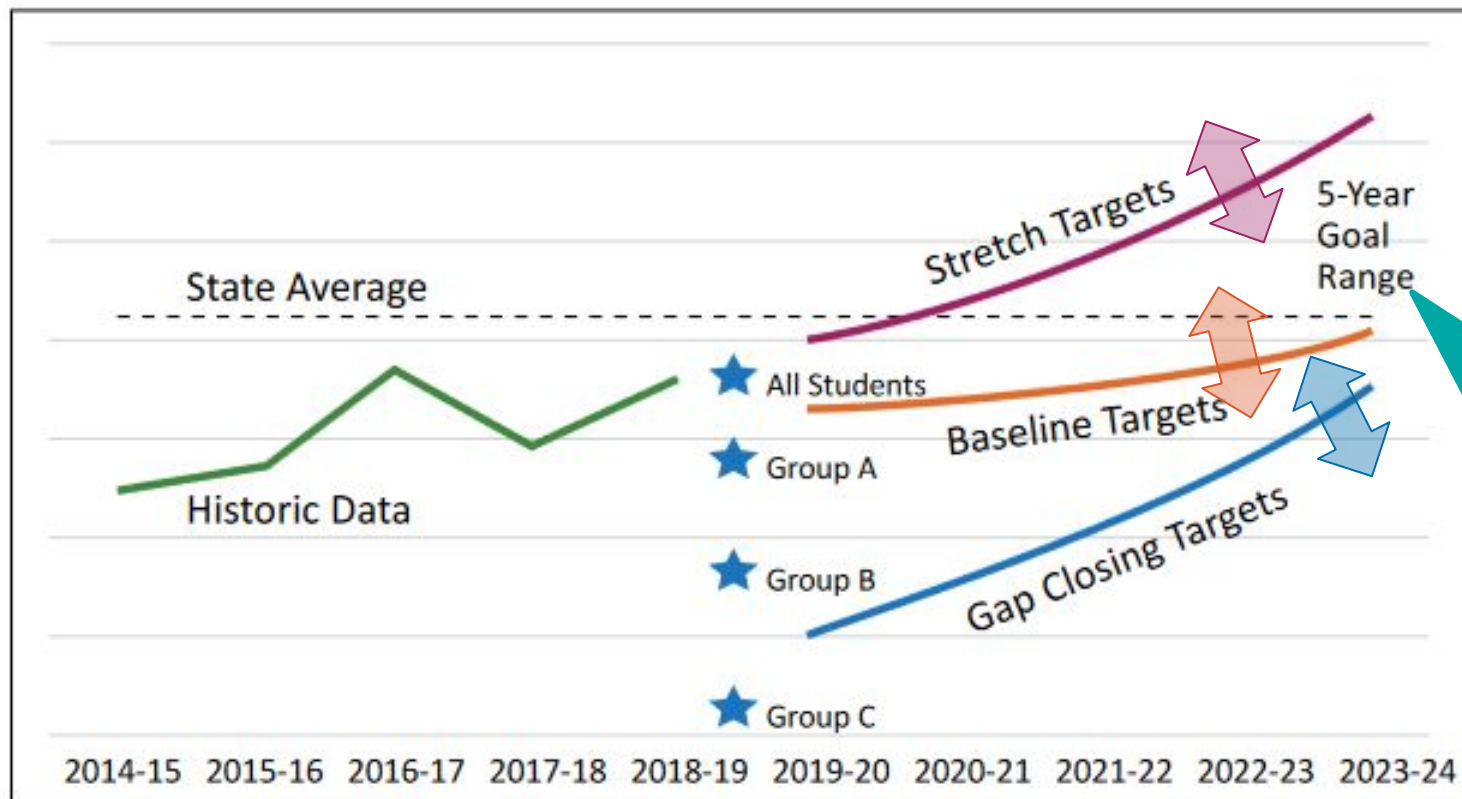
Release Date: November, 2022

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Types of Targets

For the five common metrics, three types of targets need to be set:

- Baseline
- Stretch
- Gap-Closing



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Context can alter the trajectories of all

What are Local Optional Metrics (LOMs)?

- Metrics established in addition to the five common metrics:
 - Third-grade reading proficiency rates measured by ELA
 - Ninth-grade on-track rates
 - Regular attendance rates
 - Four-year or on-time graduation rates
 - Five-year completion rate
- Local optional metrics are designed to allow applicants to set & monitor metrics connected to the outcomes they set forward.



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Sven Ihrke
(thenounproject.com)

Why Set Local Optional Metrics?

What commitments are you working towards in your districts?

Local optional metrics are designed to allow applicants to set & monitor metrics connected to the outcomes they set forward in their plan. This provides a fuller picture of what they are trying to accomplishing.

How might investments show positive impacts in student and/or educator well-being, belonging, and health?

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LOM are an invitation to share the successes of why the IG investments are working in your district alongside and beyond the 5 Common Metrics.

Examples of LOMs districts are sharing (not final)

- Annual student growth rate of SEL in the area of student growth mindset & self-efficacy as measured by the Panorama Student Survey
 - *example of tending to domains of Student Mental & Behavioral Health*
- 9th grade on track with focus on Emergent Bilingual Students
 - *example attending to specific focal student group*
- Decrease Suspensions and Expulsion (tied to district strategic plan)
 - *example of systems level shift in outcomes*
- 3rd grade Math Proficiency (data from OR annual assessment)
 - *example of annual measurement*
- 6th grade Math **Growth** for Students Experiencing Disabilities (from 5th to 6th grade)
 - *example of meaningful indicator of progress*
- MAPS growth percentiles in all content areas, all grade levels, all languages
 - *example that is broadly representative*

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What are Progress Markers?

PROGRESS MARKERS

DRAFT

LONGITUDINAL PERFORMANCE GROWTH TARGETS (LPGT) KEY
3GR: 3rd Grade Reading
9GOT: 9th Grade On Track
4YG: 4 Year Grad
5YC: 5 Year completion
RA: Regular Attenders

4 COMMON GOALS
 Equity Advanced
 Engaged Community
 Strengthened Systems
 & Capacity
 Well-Rounded Education

Start to See: Early signs of progress (3-6 Months)
 Based on your investments and activities, what changes or contributions are you noticing? What practices are improving?

PM 1
3GR 9GOT 4YG 5YC RA
 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.

PM 2
3GR 9GOT 4YG 5YC RA
 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.

PM 3
3GR 9GOT 4YG 5YC RA
 Data teams are formed and 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. These changes and supports are monitored and adjusted as needed.

PM 4
3GR
 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 are research-aligned, formative, diagnostic, and/or culturally responsive.

PM 5
3GR 9GOT 4YG RA
 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.

PM 6
9GOT 4YG 5YC RA
 Student agency and voice is elevated. Educators use student-centered approaches that shift processes and policies that actualize student and family ideas and priorities.

PM 7
3GR 9GOT 4YG 5YC RA
 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 to meet student needs, including addressing systemic barriers, the root-causes of chronic absenteeism, academic disparity, and student well being.

PM 8
3GR
 Comprehensive, evidence-informed, culturally responsive literacy strategies, including professional development plans for educators, are documented and communicated to staff, students (developmentally appropriate), and families. Literacy strategies and instruction are evaluated and adjusted to deepen students' learning. Digital resources are being used with fidelity to advance learners' engagement with instruction.

PM 9
9GOT
 A review of 9th grade course scheduling is conducted, accounting for student core and support course placement, and disaggregated by student focal groups.

PM 10
3GR 9GOT 4YG 5YC RA
 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/extra curricular 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.

PM 11
3GR 9GOT 4YG 5YC RA
 Schools strengthen partnerships with active community organizations and partners, including local public health, mental health, colleges, workforce development boards, employers, 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.

PM 12
3GR 9GOT 4YG 5YC RA
 Financial stewardship reflects high-quality spending with accurate and transparent use of state and federal funds in relationship to a comprehensive needs assessment and the priorities expressed by students, families, communities, business, and Tribal partners in resource allocation and review.

PM 13
3GR 9GOT 4YG 5YC
 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.

PM 14
3GR 9GOT 4YG 5YC RA
 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 students strengths and interests, to improve their practice and advance professional learning.

PM 15
9GOT 4YG 5YC RA
 Schools create places and learning conditions where every student and family 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.

Progress Markers are sets of indicators, potential milestones, that identify the kinds of changes towards the outcomes expected and desired in action, attitude, practice, or policies over the next four years that can help lead applicants to reaching Longitudinal Performance Growth Targets and the four common goals.

From: ODE [Integrated Guidance](#) pg. 74-75

Co-Development: Working Together

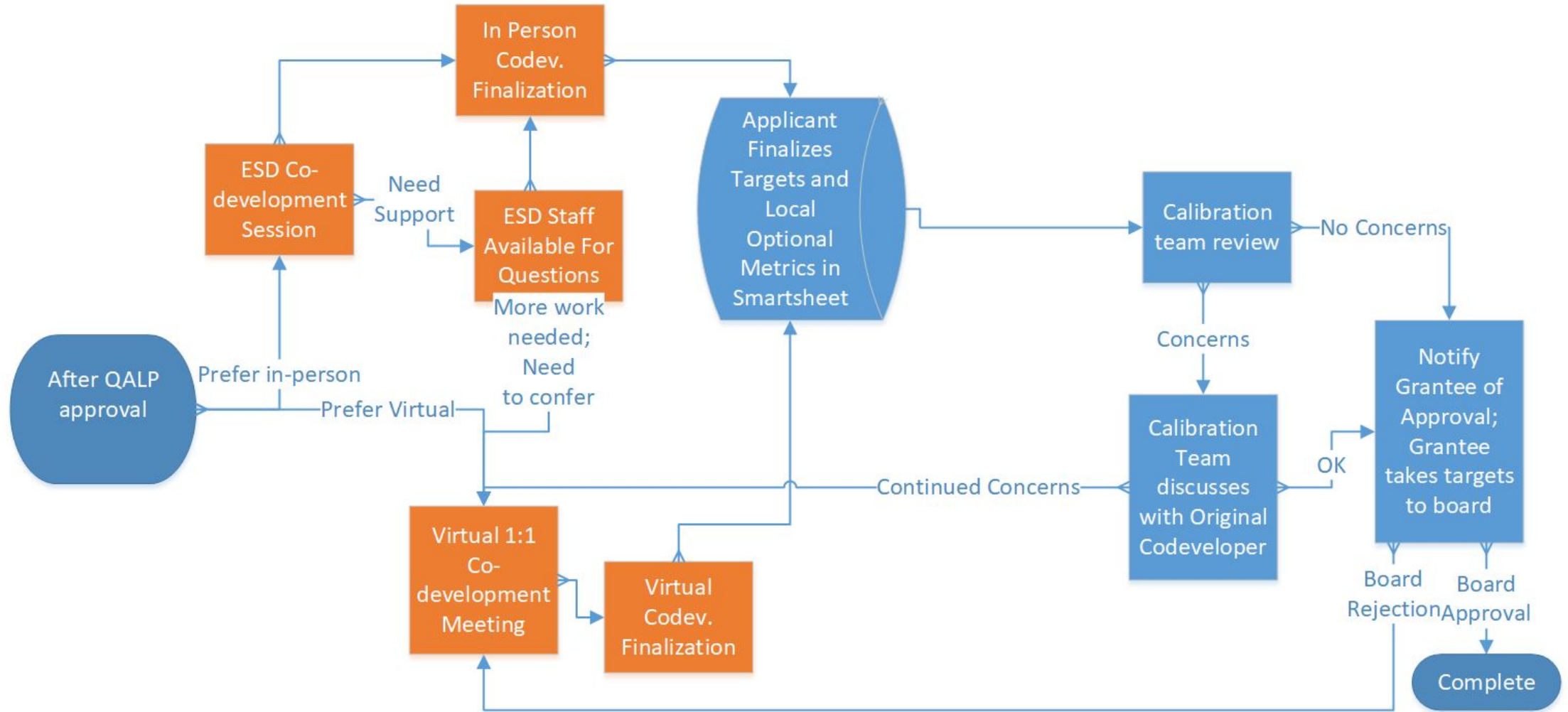
The goal of Co-Development is to collaboratively craft targets that represent what is ambitious, attainable, and realistic for applicants.

In this process, we're looking to really understand the *why* behind how draft targets were determined and to understand decision making that is based on context that is regionally specific.

We can offer these supports:	Applicants can support this process by:
<ul style="list-style-type: none">● Collaborative, open & regular communication with Applicants.● Access to a Google folder of shared artifacts, documents, and Smartsheet spreadsheets.	<ul style="list-style-type: none">● Collaborative, open & regular communication with ODE.● Submitting Smartsheet application with draft LPGTs by deadline: March 31, 2023. <i>Note: Can still submit now!</i>

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Co-Development Flow Chart



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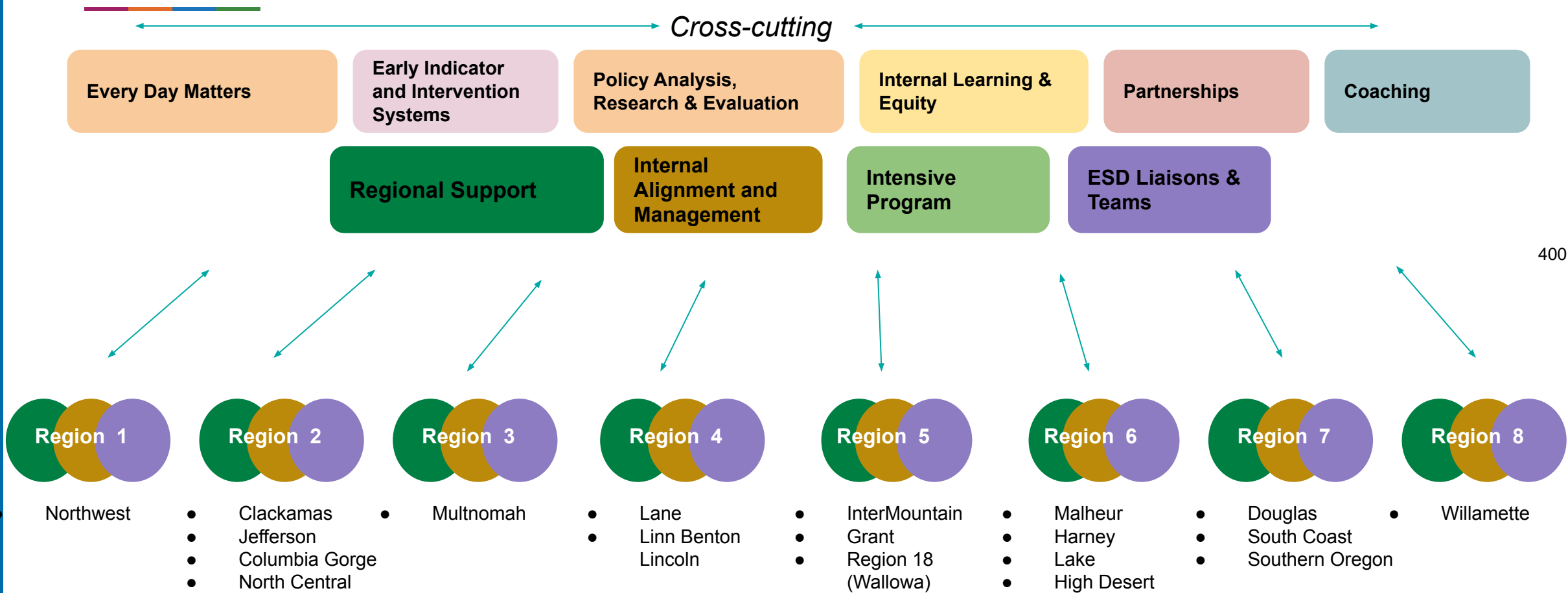
What's on the horizon?



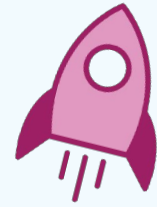
- Agreements on LPGTs and Final Agreements back through School Boards
- Integrated Reporting and Dashboard = One Stop Shop
- Pivoting from Review to Remedy
- Ongoing Regionalized Implementation Support in continued partnership with ESDs
- Research analysis on financial stewardship – what's been planned, use of tiered planning (per Secretary of State's System Risk Report recommendation)
- Coaching offerings - including sustained professional learning series on equitable practices, community engagement, and skilled use of early indicator and intervention systems

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Regional Coordination



Supports and Resources



CONTINUUM OF SUPPORTS AND IMPROVEMENT OPPORTUNITIES

Improving and strengthening educational offerings often works best when effort is mutual and the focus is shared. **All districts and schools can make use of these supports and improvement opportunities across all programs.** ODE is a state educational agency and holds a range of responsibilities and expectations to support innovation and improvement. ODE aims to meet its obligations through the following continuum of offerings:

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[Innovation and Improvement landing page](#)

Community Engagement

This [Community Engagement Toolkit](#) lays out a framework and recommendations for applicants to engage in robust community engagement with focal student groups, families, communities, and staff. Applicants are encouraged to build on existing work and to grow with community, youth, or staff advisories developed previously.

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LEVELS OF COMMUNITY ENGAGEMENT

0	1	2	3	4	5
STANCE TOWARDS COMMUNITY					
IGNORE	INFORM	CONSULT	INVOLVE	COLLABORATE	DEFER
INTENTION					
Protecting School/ District Interests <i>Unintended Impact to Consider: Marginalizing Communities</i>	Keeping Communities Updated <i>Unintended Impact to Consider: Placating & Underestimating Community Wisdom</i>	Receiving Community Input <i>Unintended Impact to Consider: Tokenizing & Gatekeeping Community Engagement</i>	Meaningfully Engaging Community Voice <i>Unintended Impact to Consider: Community Voice is Not Heard</i>	Collaborating and Sharing Power with Communities <i>Unintended Impact to Consider: Collaborative Process Derailed by Power Dynamics & Lack of Relational Trust</i>	Communities Drive and Own the Work <i>Unintended Impact to Consider: Sovereignty and Core Agreements are Not Honored</i>

TRIBAL CONSULTATION

Oregon has nine federally recognized tribes that are geographically dispersed, and may need time to convene and engage in planning efforts. Tribes are sovereign governments. Many tribes have an agency for education and a director who can connect the district to its parents and community members. Information on the tribes including contact information is available on the [Oregon Tribal page](#).

A four-part webinar series

Data in Context

How are connections between diverse data sources essential to setting inclusive targets?

Setting Targets by Making Sense of the Mosaic of Data

How can realistic, ambitious, and attainable targets be developed with the data that is available?

Local Optional Metrics

How can existing or additional data be leveraged to broaden the narrative of particular successes and challenges within districts?

Deep Dive Workshop: Setting Growth Targets

How can collaboration support the complexities of establishing realistic targets?



January 11, 2022
3:30-5:00 PM



January 18, 2022
4:00-5:30 PM



February 1, 2022
4:00-5:30 PM



February 15, 2022
4:00-5:30 PM

[Register here!](#)

[Register here!](#)

Resources & References

IG Application Process and Navigation

- [Integrated Guidance District Engagement Session 1](#)
- [Integrated Guidance District Engagement Session 2](#)
- [Charter School Webinar on Integrated Guidance](#)
- [Integrated Planning & Budget Template Webinar](#)
- [Virtual Charter School Webinar](#)

Monitoring and Evaluation Series

- [Navigating the Data Visualization Sheets](#)
- [Data in Context - PowerPoint Slides](#)
- [Setting Targets by Making Sense of the Mosaic of Data](#)
- [Local Optional Metrics - PowerPoint Slides](#)
- [Setting Growth Targets - PowerPoint Slides](#)

Community Engagement

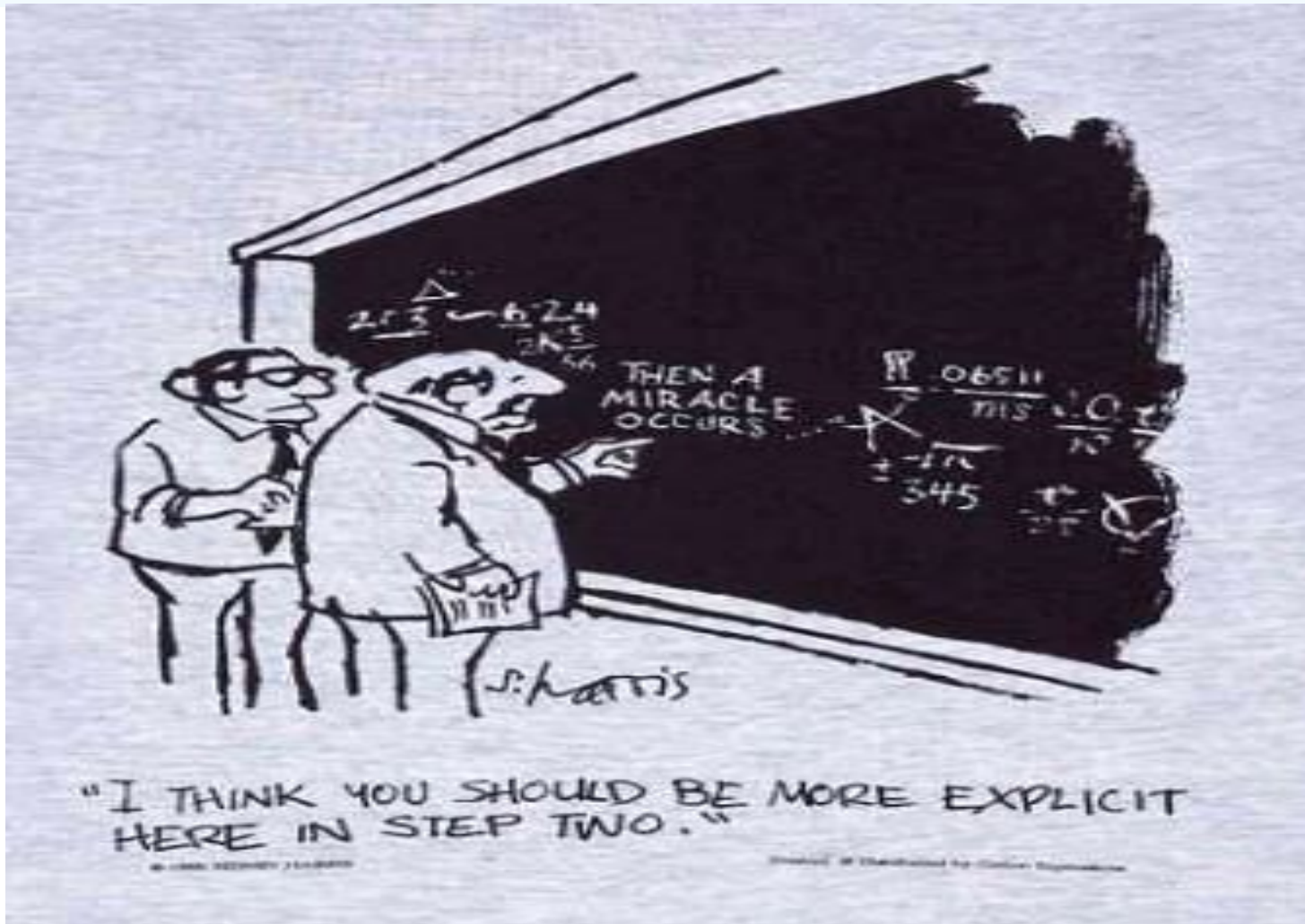
- [Sustaining Ongoing Community Engagement for District and ESD Leaders](#)
- [Integrated Guidance Community Engagement Session](#)
- [Oregon Business Leaders Presentation](#)

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Health & Well-Being

- [Centering Health and Well-being in Education - OHA/ODE Webinar](#)

What are we learning?



The question of implementation is simply whether or not a given idea, practice or program gets “put in place.”

405

Michael Fullan

Implementation Strategy

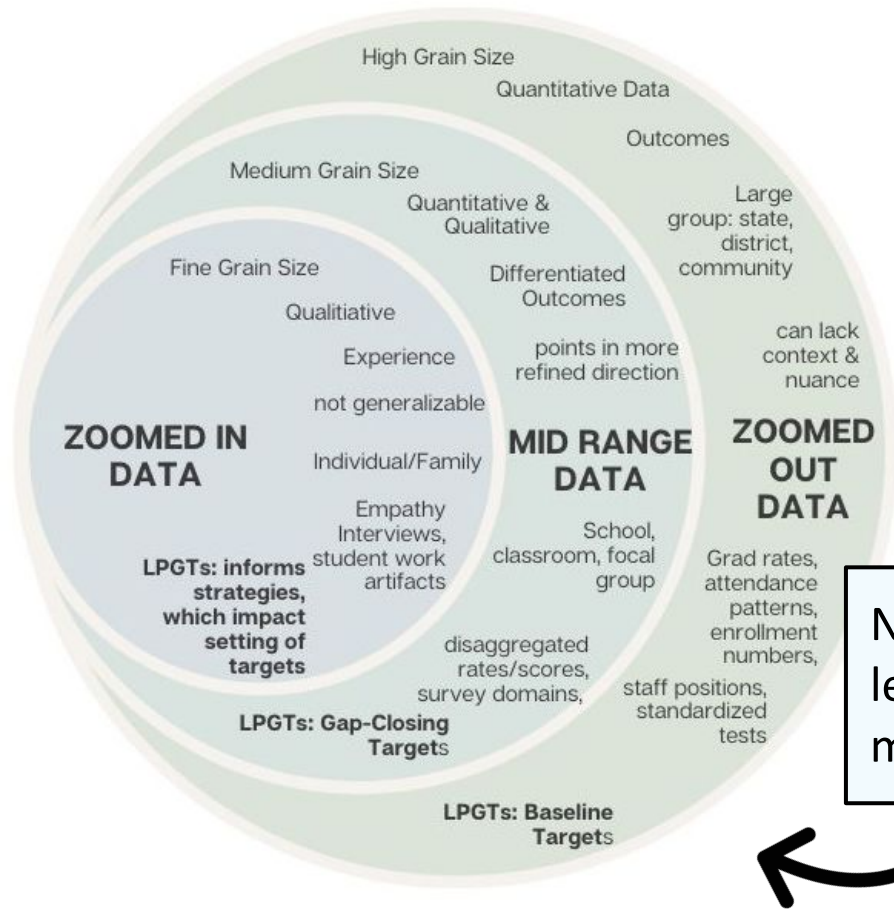
- Forward Stance: embrace integrity, purpose, responsibility
- Earn Trust by being operationally excellent
- Focus on the learning - treat this like educators treat student work
- Right amount of challenge and support
- Precision over prescription
- Windows for course correction and iteration
- Recover quickly when we mis-step or need to adapt
- Model practices and strategies we seek to cultivate
- Avoid clutter
- Go for excellence, not the lowest common denominator or most fearful, fragile, or cynical person in the room

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Positive Pain Points

- Bridging with CTE Regional Coordinators and linking community engagement, workforce sector planning, and partners into shared planning and investing
- Charter Schools
- Continuing to shift away from hyper-compliance (tell us exactly what to write) to authentically capturing current realities and context
- Navigating turnover
- Building and reshaping ODE / EII staff capacity
- Building and brokering connections with ODE staff in other offices and in each region

Levels of Data

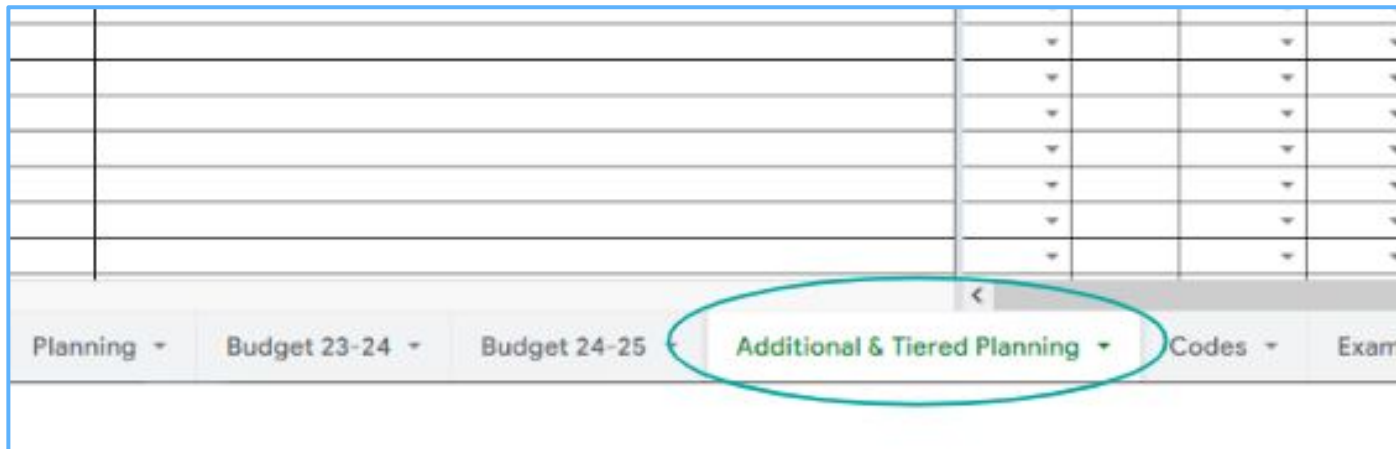


Note the relationship between levels of data & where they most apply in setting targets

Integrating Levels of Data means:

- Understanding the relationship amongst each of these levels to interpret data
- Capturing more of the regional context
- Applying context when setting targets
- Advancing towards inclusive & equitable practices

Tiered Planning



A screenshot of a budget planning software interface. The interface shows a grid of rows and columns. At the bottom, there is a navigation bar with several dropdown menus: 'Planning', 'Budget 23-24', 'Budget 24-25', 'Additional & Tiered Planning', 'Codes', and 'Exam'. The 'Additional & Tiered Planning' dropdown menu is highlighted with a red circle. The grid above it has several rows, each with a dropdown arrow in the rightmost column.

Integrated Planning & Budget Template Webinar on Tuesday, October 18 from 10-11am. The webinar will be recorded and posted on the Innovation & Improvement webpage afterwards.

TIERED PLANNING IS AN IDEAL WAY TO REDUCE LATER IMPLEMENTATION CHALLENGES

A strong plan with community-informed alternatives for additional tiered expenses can help smaller districts minimize going through rigorous process requirements within a given year or biennium.

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Staying focused, continuing to learn . . .

“The headline is that students, communities, educators, school leaders, and postsecondary, business, and industry partners now have the opportunity and responsibility to plan and integrate these programs and funding streams in a way that improves the well-being, health, climate, quality of instruction, and outcomes for each and every student in Oregon with dedicated attention to focal student groups. By aligning these systems and programs, our hope is to create more time and less complicated ways for educational leaders to support students.”

- p. 5, [Integrated Guidance](#)



Questions?

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Oregon State Board of Education

April 20, 2023

AGENDA ITEM: 8.C.

<p>SUBJECT: Economically Disadvantaged Definition/OAR 581-014-0001</p> <p>STAFF NAME & OFFICE: Jon Wiens, Director of Data, Accountability, and Reporting & Dan Farley, Assistant Superintendent for Research, Assessment, Data, Accountability, and Reporting</p> <p>HB 2060 (2021) amended the Student Success Act to require the State Board to adopt a definition of Economically Disadvantaged by rule. The Board adopted a definition at its December 2022 meeting. Staff are presenting and implementation update, as requested by the Board</p>	<p><input checked="" type="checkbox"/> Informational Presentation</p> <p><input type="checkbox"/> Written Report</p>
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BACKGROUND

History and Purpose

Federal and state law require that the Oregon Department of Education (ODE) report information on students who are “economically disadvantaged.” Federal law does not define this group. Oregon, as well as almost all states, has historically reported a student as economically disadvantaged if the student is eligible to receive free or reduced price (FRP) school meals.

HB 2060 (2021) required the state board to adopt a definition of economically disadvantaged in rule, which the Board did at its December 2022 meeting. The new rule is effective July 1, 2023 and defines a student as Economically Disadvantaged if they meet one or more of the following requirements:

- Are eligible for Supplemental Nutrition Assistance Program (SNAP) or Temporary Assistance for Needy Families (TANF) benefits;
- Are in foster care;
- Are migrant; or
- Are experiencing homelessness

When adopting the rule the State Board asked that ODE continue to look into additional students to include in this group, including students receiving Medicaid. The concern shared was that the current definition was not including students who are Compacts of Free Association (COFA) eligible, whom the Medicaid dataset could help incorporate.

ODE is working to implement this definition for 2023-2024 school year reporting, and the purpose of this presentation is to provide an update on our implementation work.

SUMMARY OF PREVIOUS BOARD ACTION

In December 2022 the Board adopted the economically disadvantaged definition above as part of OAR 581-014-0001.

POLICY ISSUE OR CONCERNS

Implementation Progress Update

Oregon State Board of Education

April 20, 2023

AGENDA ITEM: 8.C.

ODE staff are working with DHS staff to secure an initial data sharing agreement that will allow specific ODE staff access to SNAP and TANF data for use in the economically disadvantaged definition. Subsequently, ODE and DHS would partner to determine what district-level access might be feasible and defensible. These agreements take some time to complete, since there are several student privacy and security considerations that must be carefully worked out and specified in the agreements.

ODE staff are also working with OHA to gain access to Medicaid data. There are two aspects to this work:

- The completion of a project for the Nutrition program to receive monthly files of Medicaid data. The goal is to complete this project this summer.
- Receive permission to use these data in the economically disadvantaged definition.

Once those two steps are completed, ODE staff will present an expanded definition to the Board and ask that they update the rule to include Medicaid.

EQUITY IMPACT ANALYSIS

Gaining access to Medicaid data will increase the number of students included in the group, and allow the data to better represent Oregon students navigating poverty, such as students from Compact of Free Association (COFA) nations. COFA students are not currently eligible for SNAP or TANF benefit, but are eligible for Medicaid.

FISCAL ANALYSIS

None.

ATTACHMENTS

None.



Economically Disadvantaged Definition

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Informational Update
Oregon State Board of Education
April 20, 2023
Dan Farley & Jon Wiens

Reporting Economically Disadvantaged

- The Student Success Act and the federal Every Student Succeeds Act require the ODE to report on the educational progress and outcomes of students who are “economically disadvantaged”
- Oregon, like most states, has relied on eligibility for free and reduced price school meals to define this student group.
- The expansion of the number of schools offering free meals to all students (currently more than half) reduced the accuracy of that measure.
- In 2021 the legislature required the Board to adopt a definition in rule.

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Adopted Definition

At the December meeting, in OAR 581-014-0001 (14), the Board adopted the following definition:

Effective July 1, 2023, “Economically disadvantaged” means students who meet one or more of the following qualifications:

- a) are participating in Supplemental Nutrition Assistance Program funded by the United States Department of Agriculture;**
- b) are participating in the Temporary Assistance for Needy Families program as defined in Title IV of the Social Security Act;**
- c) are in foster care;**
- d) are migrant students; or**
- e) are students who are homeless.**

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Addressing December Board Questions

- During the discussion of this rule the Board asked that we work to add additional students to this group, particularly Medicaid, in order to be inclusive of COFA-eligible students.
 - ODE is working with OHA to get monthly downloads of Medicaid data. Current goal is to have that in place this summer
 - We are also working on getting permissions to use the Medicaid as part of the economically disadvantaged definition
 - Once we have the data transfers in place and receive permission to use Medicaid data we will come to you to amend the rule
 - The Medicaid system is also undergoing a recertification process following the pandemic

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Implementation Status

- Staff have been working to update data sharing agreements with DHS so that accountability staff can access TANF/SNAP data that our Child Nutrition program receives
 - We have verbal support for access to the TANF/SNAP data, but are still working through the formal process of amending the data agreement
- We have contacted the Medicaid program at the Oregon Health Authority and are working to see if data sharing agreements can be updated to allow us to add Medicaid to the definition
- One of the complications to this work is to carefully ensure that all applicable privacy laws are being followed

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Anticipated Timeline

- Spring 2023 – Anticipated signing of data sharing agreements with both DHS and OHA
- Summer 2023 – Goal for achieving monthly Medicaid data downloads, but this may be delayed
- Fall 2023 – Analysis of data and finalization of business rules for the calculation
- Summer 2024 — Aggregate reporting of data on the new student group

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Questions, Concerns, & Recommendations

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