



# THE OREGON STATE BOARD OF EDUCATION

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

**AGENDA**  
**Regular Meeting**  
**Public Service Building 251 A/B**  
**255 Capitol Street NE**  
**Salem, OR 97310**  
**Thursday, June 15, 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: 9:00 AM
  - B. **Recruitment Update**  
Time: 9:05 AM
  - C. **Board Member Reports**  
Time: 9:20 AM
  - D. **Break**  
Time: 10:10 AM
  - E. **Director's Report** **3**  
Time: 10:15 AM
- 2. **Public Comment**  
Time: 10:50 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. 15
- 3. **Consent Agenda**  
Time: 11:05 AM
  - A. Fingerprinting Background Check Rule Changes: OAR 581-021-0512 and 581-045-0587 16
  - B. Cottonwood Charter School Contract 2023-2033 28
  - C. Compulsory Attendance Notices: OAR 581-021-0077 92
  - D. Temporary Rules: Federal ESEA Program Appeals Process 102
  - E. Transportation Supplemental Plan: Oregon Trail School District 107
  - F. Transportation Supplemental Plan: Sisters School District 118
  - G. 2023-2024 State Board of Education Leadership Nominations 129
  - H. 2023-2024 Board Calendar 1



**4. Adoptions**

A. Update to Health Services Rule: OAR 581-022-2220 133

*Time: 11:10 AM*

Rachel Smith, Office of the Director and Ely Sanders, Office of Enhancing Student Opportunities

B. Oregon’s Transformative SEL Framework with K-12 Student Standards 145

*Time: 11:20 AM*

Alexa Pearson and Vanessa Martinez, Office of Teaching, Learning, and Assessment

C. Board Resolution 197

*Time: 11:30 AM*

Guadalupe Martinez-Zapata, Chair

**5. First Readings**

A. Suspension of the Assessment of Essential Skills through the 2027-2028 School Year: OAR 581-022-2115 200

*Time: 11:40 AM*

Dan Farley, Office of Research, Assessment, Data, Accountability and Reporting

**6. Break for Lunch**

*Time: 12:00 PM*

**7. First Readings (continued)**

A. Menstrual Dignity For Students: OAR 581-022-XXXX 224

*Time: 1:00 PM*

Sasha Grenier and Susan Payne, Office of Teaching, Learning, and Assessment, and Emily Nazarov, Office of the Director

**8. Informational Reports**

A. Proficiency on the Alternate English Language Proficiency Assessment 248

*Time: 1:20 PM*

Dan Farley, Andrea Lockard, Mason Rivers, and Ben Wolcott, Office of Research, Data, Accountability, and Reporting

B. Computer Science Education Implementation Plan Update 258

*Time: 1:40 PM*

Andrew Cronk and Ken Greenbaum, Office of Teaching, Learning, and Assessment, and Celia Núñez, Higher Education Coordinating Commission

C. Break

*Time: 2:05 PM*

D. Governor Kotek’s Early Learning Initiative and Oregon’s Early Literacy Framework: 283

A Strong Foundation for Readers and Writers (K-5)

*Time: 2:15 PM*

Pooja Bhatt, Office of the Governor and Jennifer Patterson, Office of Teaching, Learning, and Assessment

**9. Adjourn**

*Time: 3:00 PM*



# Oregon State Board of Education

*Update*

June 15, 2023

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# Today...

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- Comprehensive School Counseling
- 2023 Legislative Session Update
- Operating under HB 5046 Continuing Resolution

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# Comprehensive School Counseling

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# Comprehensive School Counseling

- The August 2023 issue of the Division 22 newsletter will highlight the Comprehensive School Counseling rule and include:
  - Updated ODE Comprehensive School Counseling Program (CSCP) webpage and resources
  - CSCP Course info and link
  - A newly developed tool to support districts in determining compliance with all components of OAR 581-022-2060 (optional to use)
  - Recommendation that Superintendents meet with their school or district counseling team lead to determine compliance. (This recommendation can also be included in the tool ODE distributes for districts to internally track compliance/document evidence – this year’s version is anticipated to be released later in June)
- Include an *optional* question on the assurances form to gather additional data and provide targeted technical assistance:
  - Allow districts that report out of compliance to attach a completed compliance determination tool or [evaluation tool](#) to help ODE evaluate the proposed corrective action and work with the district to determine what supports are needed.

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# 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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# Senate Remains Stalled

- Beginning in mid-May, Senate Republicans began boycotting floor sessions to deprive the Oregon Senate of the quorum needed to pass bills.
- Oregon requires two-thirds of lawmakers to be present for a vote, unlike 45 states where a simple majority constitutes a quorum.
- This is the longest legislator walkout in Oregon history.
- Over 300 policy and budget bills are awaiting votes.
- While Committees continue to move bills, virtually all activity on the Senate floor remains at a standstill.
- The session is not likely to end on June 15, as that would require a floor vote.
- It will likely end on the Constitutional Sine Die - June 25.
- If the session ends without restoring votes in the Senate, it is likely that all policy bills will die and a special session will need to be called to pass budget bills for the continuing operation of state government.

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# ODE LCs, Pending Governor-Elect Approval

- **HB 2280: Definition of Consent for School Policies** - Stuck on Senate floor
- **HB 2281: District Appointed Civil Rights Coordinator** - Stuck on Senate floor
- **SB 215: Technical Fix Bill** - Stuck on Senate floor
- **HB 2275: Grant Consolidation Work** - Stuck on Senate floor
- **SB 421: Racial Equity & Youth Justice Collaborative - HB 4099 (2022) - Sen. Dembrow** - Referred to W&Ms 10
- **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** - Stuck on Senate floor
- **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 where an amendment was added to reduce the SIA to pay for the early literacy initiative
- **SB 1045: Secretary of State Systemic Risk Report Response** - Gov. Kotek - Referred to W&Ms
- **LC 454: Refugee & Immigrant Student Success Plan** - Gov. Kotek

# Other Education Legislation Under Consideration...

- **SB 275:** TSPC moving to ODE - Awaiting Governor's Signature
- **HB 3199:** Middle School PE requirements - Stuck on Senate floor
- **SB 285:** OSCIM bond matching grants - Law
- **SB 3:** Future ready and financial literacy diploma requirements - Stuck on Senate floor
- **SB 409:** Curriculum posting requirements - Referred to HED - Appears dead
- **SB 283:** Omnibus educator workforce bill - Referred to W&Ms
- **SB 819-A16:** Referred to House Rules - \$3.6 million fiscal denied
- **HB 5015:** SSF set at \$10.2 billion - Stuck on Senate floor
- **HB 5014:** ODE Budget Bill (Legislature denied SSF Modernization, SB 744 staffing, Health/Mental Health in Education, Migrant and Multilingual Education, and most Student Success Plans. Also reduced EI/ECSE. - Stuck on Senate floor
- Summer learning - continued advocacy, no Legislative movement

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# Operating under HB 5046 Continuing Resolution

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# Operating under HB 5046 Continuing Resolution

- [HB 5046](#) passed early in the session.
- It is a regular practice to create a mechanism to maintain government services between the time the Legislature passes budgets and the Governor reviews and signs them into law.
- HB 5046 is effective from July 1 - September 15, 2023.
- ODE may continue to operate during that period however, expenditures may not exceed “the last quarter of the 2021-2023 biennium”.
- This appears effective for most programs, with two significant exceptions.
  - The ELD by previous statute becomes an independent agency (DELIC) on July 1 and it will have no budget.
  - In the last quart of each fiscal year (July 1-June 30), school districts receive two state school fund (SSF) payments. In the first quarter of each year they receive four SSF payments to create cash flow to meet startup expenses and payroll.

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# Questions



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## ROSENBERG Corey \* ODE

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**From:** Bo Boo <pdxguybob@gmail.com>  
**Sent:** Friday, May 26, 2023 1:28 PM  
**To:** StateBoard Public Email  
**Subject:** Child abuse?

Why is gender and race identity a hidden curriculum?

Parents have to opt out to save their children from mental child abuse?

Test scores prove that our children's minds and taxpayer's dollars are being wasted.

But worst of all is that you support it.

Good day.

# Oregon State Board of Education

June 15, 2023

AGENDA ITEM: 3.A.

<p><b>SUBJECT:</b> Fingerprint-Based Background Checks, OARS 581-021,0511, 581-021-0512, 581-045-0586, and 581-045-0587</p> <p><b>STAFF NAME &amp; OFFICE:</b> Brock Dittus &amp; Shonna Bumgarner, Pupil Transportation &amp; Fingerprinting</p> <p>Current rules have different processes for notification of ineligibility and/or hearings; the proposed changes standardize the process for those required to have ODE clearance and remove appeal rights for those not required to have ODE clearance. Other technical fixes are included in the proposed language.</p> <p><input type="checkbox"/> New Rule <input checked="" type="checkbox"/> Amend Existing Rule <input type="checkbox"/> Repeal Rule</p>	<p><input type="checkbox"/> <b>First Reading</b> <input type="checkbox"/> <b>Presentation</b> <input type="checkbox"/> <b>No</b> <b>Presentation</b></p> <p><input checked="" type="checkbox"/> <b>Action</b> <input type="checkbox"/> <b>Temp Rule</b> <input type="checkbox"/> <b>Presentation</b> <input checked="" type="checkbox"/> <b>No</b> <b>Presentation</b></p>
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## BACKGROUND

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Oregon law requires all subject individuals (all school district employees and contracted employees with unsupervised access to children) in public schools to clear a fingerprinting background check. The Oregon Department of Education conducts fingerprinting-based background checks for all classified school employees (including contracted employees) under statutory authority of ORS 326.603. ODE also offers background clearance services for public school volunteers, and private school employees & volunteers, but this is not required by law.

ODE offers an appeal process to dispute the findings of a fingerprint-based criminal history check. A hearing offered through the department gives the appellant a chance to provide evidence that their criminal record does not prevent them from involvement in a school under law by presenting evidence contrary to the department’s findings, often if an expungement process has already been initiated by the appellant to remove previous charges.

Upon recent review, ODE’s staff determined that some parts of rule entailing the department’s process were not aligned with their statutory authority. For employees and contractors, statute requires ODE to establish an appeal process to challenge a determination by the Department that the subject individual knowingly made a false statement. ORS 326.603. An appeal process is currently offered to public school employees, who are required to be fingerprinted. However, no appeal process is offered to private school employees, which the proposed rule changes would correct. Public and private school volunteers are not required to be fingerprinted under statute, and the statute does not direct ODE to establish an appeal process. ORS 326.607. The administrative rules implementing that statute, however, include an appeal process for both public and private school volunteers.

The following table illustrates the statutory requirements, appeals offered under current administrative rules, and proposed changes to bring the rules into alignment with statute:

# Oregon State Board of Education

June 15, 2023

AGENDA ITEM: 3.A.

	Employment – Public School	Employment – Private School	Volunteer – Public School	Volunteer – Private School
Rule and Statute	OAR 581-021-0511  ORS 326.603	OAR 581-045-0586  ORS 326.603	OAR 581-021-0512  ORS 326.607	OAR 581-045-0587  ORS 326.607
Is the individual required to be fingerprinted by ODE?	Yes	No	No	No
Is an appeal right required by statute?	Yes	Yes	No	No
Does the administrative rule currently offer an appeal right?	Yes	No	Yes	Yes
Suggested rule change	Maintain appeal right	Create appeal right	Remove appeal right	Remove appeal right

Other changes proposed include adding a reference to a “statewide vendor identified by the Department of Administrative Services.” DAS has identified Fieldprint as the accepted statewide vendor and this change allows for their services as one accepted method for submitting fingerprint information for use by the department in delivering fingerprint-based background check clearances. Also, for the rules governing private school employees and contractors, the proposed changes revise the rule to identify entities that may collect fingerprints, and by doing so make this rule consistent with the rule for public schools employees. Lastly, changes are made to streamline the appeal process identified in rule to be consistent for all categories of appellants.

The proposed changes were crafted in close consultation with ODE’s government and legal affairs team to be sure they are aligned with the department’s requirements and obligations to the public. The proposed changes were brought before the Rules Advisory Committee for review, and no concerns regarding the proposed changes were raised. The department also has scheduled a hearing on the proposed changes on the day following the May State Board of Education meeting to collect feedback from stakeholders.

## SUMMARY OF PREVIOUS BOARD ACTION

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This is the first presentation of the proposed changes to the board.

# Oregon State Board of Education

June 15, 2023

AGENDA ITEM: 3.A.

## HAS THE RULE CHANGED SINCE LAST BOARD MEETING?

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

## POLICY ISSUE OR CONCERNS

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The proposed revisions to the rule before the Board today regarding who has access to the appeal process are being proposed in order to bring the administrative rule into alignment with statute. However, even in a rule revision that is a “technical adjustment” there are impacts to consider. It is important to acknowledge that the topic of fingerprinting background checks often raise broader concerns about the nature of the criminal justice system and its effects. People of color are arrested and convicted at higher rates than their white peers. The criminal justice system has a disproportionate impact on people of color, and the fingerprint-based background check process therefore also has a disproportionate impact on people of color.

During the presentation the Rulemaking Advisory Committee, staff heard feedback from participants about the impact of the fingerprint based background checks on people of color in general. Staff acknowledged the feedback and committed to considering other changes to the process, including possible legislative concepts.

## EQUITY IMPACT ANALYSIS

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Removing the appeal process for volunteers could further exclude people who cannot participate in schools as employees or contractors due to criminal history conflicts. While schools are not required by law to obtain a background clearance from the department, those who depend on the department’s clearances to make their decision as to whether someone is allowed to participate as a volunteer could potentially lose a chance for someone to demonstrate that the department’s review of their criminal history was incorrect or incomplete.

## FISCAL ANALYSIS

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The Pupil Transportation & Fingerprinting Unit spends much time and resources attempting to deliver consistent service within projected time limits, particularly in the fall when there is a much higher volume of requests due to school startup. Since attempts to obtain new permanent positions to assist with the unit’s workload have not been successful, adoption of the proposed changes would decrease some of the administrative work involved with sending letters to disqualified volunteer applicants informing them of an appeal right, resulting in a fiscal benefit to the state.

# Oregon State Board of Education

June 15, 2023

AGENDA ITEM: 3.A.

## EFFECT OF A “YES” OR “NO” VOTE

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A “yes” vote would create appeal rights for private school employees, remove appeal rights for public and private school volunteer candidates, and accept the technical changes detailed in this docket.

A “no” vote would retain the current rule language, including the lack of appeal right for private school employees, and retain the department’s current practices.

## STAFF RECOMMENDATION

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

## ATTACHMENTS

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- Proposed Rule Changes to OAR 581-021-0511, 581-045-0586, 581-021-0512, and 581-045-0587

**581-021-0511**

**Fingerprinting of Subject Individuals in Positions Not Requiring Licensure as Teachers, Administrators, Personnel Specialists, School Nurses**

(1) School districts shall adopt and implement local board policy related to fingerprint collection and processing which shall:

(a) Specify that subject individuals as defined by this rule are subject to fingerprinting and criminal records checks required by law;

(b) Specify which contractors will be considered to have unsupervised access to children and are subject to fingerprinting and criminal records checks required by law;

(c) Specify the format used to notify subject individuals that fingerprinting and criminal record checks are required by law and that any action resulting from those checks may be appealed as a contested case;

(d) Provide a clear statement that the district will terminate the employee, if it receives notification by the Superintendent of Public Instruction that the person has a conviction for any of the crimes prohibiting employment that are identified under section (8) of this rule;

(e) Provide a clear statement that the district may terminate the employee, if it receives notification by the Superintendent of Public Instruction that the person has knowingly made a false statement as to the conviction of any crime;

(f) Specify that subject individuals may begin to carry out terms of a contract or employment on a probationary basis pending the return of state and national criminal records checks;

(g) Identify that employment shall be offered prior to collecting fingerprint information and that fees may be collected from the subject individual. The subject individual may request that the amount of the fee be withheld from the amount otherwise due the individual, and the school district shall withhold the amount only upon the request of the subject individual; and

(h) Identify a procedure that ensures the integrity of fingerprint collection and will prevent any possible compromise of the process.

(2) Fingerprints may be collected by one of the following:

(a) Employing school district staff;

(b) Contracted agent of employing school district;

(c) Local or state law enforcement agency; ~~or~~

(d) Statewide vendor identified by the Oregon Department of Administrative Services.

(3) Immediately following offer and acceptance of employment or contract, school districts shall send fingerprint information for each subject individual to the Oregon Department of Education for purposes of a criminal records check.

(4) Criminal records check requests shall be submitted electronically through the statewide vendor identified by DAS. Exemptions from this requirement may be granted by the Oregon Department of Education on an individual basis. Reasons for exemption include, but are not limited to, geographic location and ability of vendor to meet needs. School districts exempted from the electronic process shall submit fingerprint information on forms provided by the Oregon Department of Education.

(5) The Oregon Department of Education shall request criminal records information from the Oregon State Police in the manner prescribed by law. A fee per criminal records check request shall be established by the department, reviewed annually, and commensurate to cost changes to Oregon State Police or Federal Bureau of Investigation fee schedules and other costs associated with acquiring and furnishing criminal offender information. The fee shall be:

(a) Deducted from the SSF payment for school districts that receive SSF payments; or

(b) Invoiced to school districts that do not receive SSF payments.

(6) Upon receipt of criminal records information, the Oregon Department of Education shall review the criminal records of a subject individual. The State Superintendent of Public Instruction shall:

(a) Issue to the subject individual a statement of criminal history status and information regarding their right to an appeal if they do not meet the requirements for employees or contractors or knowingly made a false statement as to a conviction of a crime; and

(ab) Issue to the school district a statement of criminal history status and related impact on employment or contract qualification and, if applicable, the Oregon Department of Education's determination that the subject individual knowingly made a false statement as to conviction of a crime. ;and

~~(b) Notify the school district if the subject individual has knowingly made a false statement as to conviction of a crime.~~

(7) Subject individuals who refuse to consent to the criminal records check or refuse to be fingerprinted shall be terminated from employment or contract status by the district.

(8) Subject individuals who have a conviction for any of the crimes listed in ORS 342.143, or the substantial equivalent of any of those crimes if the conviction occurred in another jurisdiction or in Oregon under a different statutory name or number, shall be refused continued employment or have employment terminated upon notification from the Superintendent of Public Instruction.

(9) A school district may terminate the employment of any subject individual who knowingly makes a false statement as to the conviction of a crime upon notification of the false statement by the Superintendent of Public Instruction.

(10) Evaluations of crimes shall be based on Oregon laws in effect at the time of conviction, regardless of the jurisdiction in which the conviction occurred.

(11) Prior to making a determination that results in a notice and opportunity for hearing, the Superintendent of Public Instruction may cause an investigation to be undertaken. Subject individuals and districts shall cooperate with the investigation and may be required to furnish oral or written statements by affidavit or under oath. If the Superintendent of Public Instruction determines through investigation that a violation of this rule has not occurred, a written decision explaining the basis for the decision will be provided to the subject individual.

(12) Subject individuals may appeal a determination that prevents their employment or eligibility to contract with a school district as a contested case under ORS 183.413 to 183.470 to the Superintendent of Public Instruction.

(13) The Oregon Department of Education shall not provide copies of criminal records to anyone except as provided by law. The subject individual may inspect his or her personal criminal records under the supervision of properly certified LEDS personnel at the Oregon Department of Education.

(14) The Oregon Department of Education shall maintain a record of all properly submitted fingerprint information. The record shall include at least the following:

- (a) Fingerprint sequence number;
- (b) District submitting the fingerprints;
- (c) Date the Department form is received;
- (d) Date fingerprint information is sent to Oregon State Police; and
- (e) Date denial or final approval sent to district.

**581-021-0512**

**Non-employment criminal background checks for school districts**

(1) School districts that have volunteers that have direct unsupervised contact with students shall have a policy requiring those volunteers to undergo a criminal records check.

(2) State criminal records check based on name and DOB:

(a) A school district may submit a request to the Oregon Department of Education for an in-state criminal records check in LEDS based on name and DOB on any volunteer.

(b) State criminal records check requests made under this section shall:

(A) Use forms provided by the Oregon Department of Education;

(B) Include an authorization from the volunteer for the Oregon Department of Education to perform a criminal records check; and

(C) Include payment of the processing fee of \$5 per person to be checked.

(3) State and national criminal records check based on fingerprints:

(a) A school district may submit a request to the Oregon Department of Education for a fingerprint-based criminal records check for volunteers identified in local board policy as requiring a fingerprint-based criminal records check.

(b) Requests for fingerprint-based criminal records checks shall be submitted electronically through the statewide vendor identified by DAS. Exemptions from this requirement may be granted by the Oregon Department of Education on an individual basis. Reasons for exemption include, but are not limited to, geographic location and ability of vendor to meet needs. School districts exempted from the electronic process shall submit fingerprint information on forms provided by the Oregon Department of Education;

(c) A fee shall be established by the department, reviewed annually, and commensurate to cost changes to Oregon State Police or Federal Bureau of Investigation fee schedules and other costs associated with acquiring and furnishing criminal offender information. The fee shall be:

(A) Deducted from the SSF payment for school districts that receive SSF payments; or

(B) Invoiced to school districts that do not receive SSF payments.

(d) A fingerprint-based criminal records check conducted in accordance with this section will be a state and national check through the Oregon State Police and the FBI.

(4) The Oregon Department of Education shall review the criminal records when a request is made under section (2) or (3) of this rule, make a fitness determination, and notify the school district of that determination.

(a) A volunteer does not meet the fitness standards of this rule if the individual has:

(A) A conviction for any of the crimes listed in ORS 342.143, or the substantial equivalent of any of those crimes if the conviction occurred in another jurisdiction or in Oregon under a different statutory name or number; or

(B) Knowingly made a false statement.

(b) The Oregon Department of Education shall not provide copies of criminal records to anyone except as provided by law.

~~(5) Volunteers may appeal a fitness determination resulting from a fingerprint-based criminal records check under section (3) of this rule as a contested case under ORS 183.413 to 183.470 to the Superintendent of Public Instruction.~~

~~(6)~~ Notwithstanding the fitness determination made by the Oregon Department of Education pursuant to this rule, a school district may allow a volunteer that has undergone a criminal records check to have direct, unsupervised contact with school children.

#### **581-045-0586**

#### **Fingerprinting of Subject Individuals Employed by Private Schools in Positions Not Requiring Licensure as Teachers, Administrators, Personnel Specialists, School Nurses**

(1) A private school may request that the Oregon Department of Education conduct a criminal records check of a subject individual by submitting fingerprint information for that individual to the Department.

(2) Fingerprints may be collected by one of the following:

(a) Employing school district staff;

(b) Contracted agent of employing school district;

(c) Local or state law enforcement agency; or

(d) Statewide vendor identified by the Oregon Department of Administrative Services.

(23) Criminal records check requests shall be submitted electronically through the statewide vendor identified by DAS. Exemptions from this requirement may be granted by the Oregon Department of Education on an individual basis. Reasons for exemption include, but are not limited to, geographic location and ability of vendor to meet needs. Private schools exempted from the electronic process shall submit fingerprints on forms provided by the Oregon Department of Education.

(34) The Department shall request criminal records information from the Oregon State Police in the manner prescribed by law. A fee per criminal records check request shall be established by the department, reviewed annually, and commensurate to cost changes to Oregon State Police or Federal Bureau of Investigation fee schedules and other costs associated with acquiring and furnishing criminal offender information. The fee shall be invoiced to the private school.

(45)(a) Upon receipt of criminal records information, the Oregon Department of Education shall review the criminal records of a subject individual. The Superintendent of Public Instruction shall:

(A) Issue to the subject individual a statement of criminal history status and information regarding their right to an appeal if they knowingly made a false statement as to a conviction of a crime; and

(B) Issue to the private school a statement of criminal history status and, if applicable, the Oregon Department of Education's determination that the subject individual knowingly made a false statement as to conviction of a crime.

~~(A) Issue a statement of criminal history status; and~~

~~(B) Notify the private school if the subject individual has knowingly made a false statement as to conviction of a crime.~~

(b) A private school may choose to employ or contract with a person who has knowingly made a false statement as to conviction of a crime.

(56) The Superintendent of Public Instruction shall notify the private school if the subject individual has a conviction for any of the crimes listed in ORS 342.143, or the substantial equivalent of any of those crimes if the conviction occurred in another jurisdiction or in Oregon under a different statutory name or number. A private school may choose to employ or contract with a person who has a conviction for a crime listed in ORS 342.143 or the substantial equivalent.

(67) The Oregon Department of Education shall not provide copies of criminal records to anyone except as provided by law. The subject individual may inspect his or her personal criminal records under the supervision of properly certified LEADS personnel at the Department.

(78) The Oregon Department of Education shall maintain a record of all properly submitted fingerprint information. The record shall include at least the following:

- (a) Card Fingerprint sequence number;
- (b) Name of private school submitting the fingerprints;
- (c) Date the Department form is received;
- (d) Date fingerprint information is sent to Oregon State Police;
- (e) Date private school was notified of criminal history results.

**581-045-0587**

**Non-employment criminal records checks for private schools**

(1) Private schools that have volunteers that have direct unsupervised contact with students may have a policy requiring those volunteers to undergo a criminal records check.

(2) State criminal records check based on name and DOB:

(a) A private school may submit a request to the Oregon Department of Education for an in-state criminal records check in LEDS based on name and DOB on any volunteer.

(b) State criminal records check requests made under this section shall:

(A) Use forms provided by the Oregon Department of Education;

(B) Include an authorization from the volunteer for the Oregon Department of Education to perform a criminal records check; and

(C) Include payment of the processing fee of \$5 per person to be checked.

(3) State and national criminal records check based on fingerprints:

(a) A private school may submit a request to the Oregon Department of Education for a fingerprint-based criminal records check for volunteers identified in local policy as requiring a fingerprint-based criminal records check.

(b) Requests for fingerprint-based criminal records checks shall be submitted electronically through the statewide vendor identified by DAS. Exemptions from this requirement may be granted by the Oregon Department of Education on an individual basis. Reasons for exemption

include, but are not limited to, geographic location and ability of vendor to meet needs. Private schools exempted from the electronic process shall submit fingerprints on forms provided by the Oregon Department of Education;

(c) A fee shall be established by the department, reviewed annually, and commensurate to cost changes to Oregon State Police or Federal Bureau of Investigation fee schedules and other costs associated with acquiring and furnishing criminal offender information. The fee shall be invoiced to the private school;

(d) A fingerprint-based criminal records check conducted in accordance with this section will be a state and national check through the Oregon State Police and the FBI.

(4) The Oregon Department of Education shall review the criminal records when a request is made under section (2) or (3) of this rule, make a fitness determination and notify the private school of that determination.

(a) A volunteer does not meet the fitness standards of this rule if the individual has:

(A) A conviction for any of the crimes listed in ORS 342.143, or the substantial equivalent of any of those crimes if the conviction occurred in another jurisdiction or in Oregon under a different statutory name or number; or

(B) Knowingly made a false statement.

(b) The Oregon Department of Education shall not provide copies of criminal records to anyone except as provided by law.

~~(5) Volunteers may appeal a fitness determination resulting from a fingerprint-based criminal records check under section (3) of this rule as a contested case under ORS 183.413 to 183.470 to the Superintendent of Public Instruction.~~

(65) Notwithstanding the fitness determination made by the Oregon Department of Education pursuant to this rule, a private school may allow a volunteer that has undergone a criminal records check to have direct, unsupervised contact with school children.

# Oregon State Board of Education

June 15, 2023

AGENDA ITEM: 3.B.

<p><b>SUBJECT:</b> Cottonwood School of Civics and Science Charter Contract (State Board Sponsored Charter School)</p> <p><b>STAFF NAME &amp; OFFICE:</b> Kate Pattison, Charter School Specialist; Emily Nazarov, Government and Legal Affairs Manager; Amanda McAdoo, Cottonwood Charter School</p> <p>Second reading of the Cottonwood School of Civics and Science Charter Contract authorizing the school to operate July 1, 2023 to June 30, 2033.</p>	<p><input type="checkbox"/> <b>First Reading</b></p> <p><input type="checkbox"/> <b>Presentation</b></p> <p><input type="checkbox"/> <b>No Presentation</b></p> <p><input checked="" type="checkbox"/> <b>Action</b></p> <p><input type="checkbox"/> <b>Temp Rule</b></p> <p><input type="checkbox"/> <b>Presentation</b></p> <p><input checked="" type="checkbox"/> <b>No Presentation</b></p>
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## BACKGROUND

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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 current charter contract expires on June 30, 2023 and the State Board of Education received an official written request from Cottonwood for renewal of the charter contract in December 2022. On April 20, 2023, the State Board approved the renewal of the school and directed the Department to negotiate a new charter contract. This contract includes updated language reviewed by the Oregon Department of Justice and the Department’s procurement team. The contract is similar to the last two charter contracts the State Board has approved for other renewed charter schools in the last two years.

Below are important sections for the Board to review for Cottonwood:

- **Section 13.G.v. Enrollment Requirements – Priority Enrollment**
  - Cottonwood has been granted the option to provide children of staff enrollment priority in the previous charter contract. As the staff has been diversifying its student and staff population, this may be leveraged as a recruitment and retention mechanism.
  
- **Section 13.G.viii. Enrollment Requirements – Student Cap**
  - In the previous contract, Cottonwood school enrollment was limited to 288 students. Cottonwood has asked to increase the cap on enrollment and this contract draft will allow 420 students. The school’s current facility does not have the capacity in its current form to support more than 288 students. If Cottonwood is going to increase in size, the school will need to find a new location or remodel the current location.

# Oregon State Board of Education

June 15, 2023

AGENDA ITEM: 3.B.

- **Section 22. School Location**

- Public charter schools are allowed by law to locate a school or facility outside of the district in which they originally applied to be sponsored. The last charter contract explicitly limited Cottonwood to a location within the Portland School District boundary. This contract allows the charter school to comply with current statute and locate outside of the District’s boundary but adds the requirement for written permission from the District. There is currently a bill being considered by the Legislature that will prohibit this for State Board of Education sponsored charter schools. If the bill passes and is signed into law, the charter school must comply with the statute.

## **SUMMARY OF PREVIOUS BOARD ACTION**

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This is Cottonwood’s fourth renewal and fifth charter contract. The school was originally approved by the Board on April 19, 2007. The initial charter was effective from July 1, 2007 to June 30, 2010. The first renewal was approved in January 28, 2010 and the second charter was effective from July 1, 2010 to June 30, 2013. The second renewal was approved March 8, 2013 and the third was effective from July 1, 2013 to June 30, 2018. The third renewal was approved April 23, 2018 and the fourth and current charter is effective July 1, 2018 to June 30, 2023. The State Board first heard Cottonwood’s fourth request for renewal at the March 2023 meeting and approved the renewal at the April 2023 meeting. The Board reviewed this contract at the May 2023 meeting.

## **HAS THE CONTRACT CHANGED SINCE LAST BOARD MEETING?**

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Yes – As follows:

1. Updated language from “Contract” to “Agreement” throughout.
2. Clarified statute for contract amounts that require notification.
3. Corrected citations of the notice section throughout.
4. Clarified and made explicit the insurance requirements in Exhibit C.

## **POLICY ISSUE OR CONCERNS**

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The Department has provided a copy of the draft charter contract to the Portland School District to ensure full transparency in the process.

## **EQUITY IMPACT ANALYSIS**

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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.

# Oregon State Board of Education

June 15, 2023

AGENDA ITEM: 3.B.

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
<b>ELA - Achievement</b>			
• 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
<b>MATH – Achievement</b>			
• 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

# Oregon State Board of Education

June 15, 2023

AGENDA ITEM: 3.B.

## 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.

Sponsorship of Cottonwood School results in a revenue of other funds at 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. Expanding enrollment will allow Cottonwood will also increase Department revenue. If the school expands to the full 420 students as allowed in this draft, it could increase Department revenue by about \$200,000 a biennium.

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

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"Yes" = The Cottonwood contract will be executed and signed by both parties initiating a new charter, authorizing the school to operate through June 30, 2033.

"No" = Cottonwood will continue to operate under the previous charter contract until a new contract is negotiated and approved by both parties.

## STAFF RECOMMENDATION

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Approve  Approve next month  No recommendation at this time

## ATTACHMENTS

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Attachment 1: 2023-2033 Cottonwood Charter Contract and Exhibits FINAL 6-5-2023

**OREGON STATE BOARD OF EDUCATION SPONSORED CHARTER SCHOOL  
AGREEMENT**

This State Board of Education sponsored Charter School Agreement (the “Agreement”) is between the State of Oregon acting by and through its Oregon Department of Education (“ODE”) on behalf of the Oregon State Board of Education (“Board”) and The Cottonwood School of Civics and Science (“Charter School”), an Oregon nonprofit corporation, each a “Party” and, together, the “Parties”.

**RECITALS**

WHEREAS the Oregon Legislature enacted Oregon Revised Statutes (ORS) chapter 338, which sets forth the laws under which charter schools are created and governed; and

WHEREAS the Board determined the Charter School’s proposal for the formation of a public charter school on April 19, 2007 complied with the purposes and requirements of ORS chapter 338; and

WHEREAS the Board and the Charter School entered into a Sponsored Charter School Agreement in June 2007 to authorize the Charter School to operate from July 1, 2007 to June 30, 2010; and

WHEREAS the Board approved the renewal of the Charter School on January 28, 2010 to authorize the Charter School to operate from July 1, 2010 to June 30, 2013; and

WHEREAS the Board approved the renewal of the Charter School on March 8, 2013 to authorize the Charter School to operate from July 1, 2013 to June 30, 2018; and

WHEREAS the Board approved the renewal of the Charter School on April 23, 2018 to authorize the Charter School to operate from July 1, 2018 to June 30, 2023; and

WHEREAS the Charter School submitted to the Board on December 30, 2022 a request for to continue its operations; and

WHEREAS the Board approved the renewal of the Charter School on April 21, 2023 and directed ODE staff to negotiate and enter into an agreement acceptable to the Board and Charter School; and

WHEREAS ORS Chapter 338 contemplates, and the Parties agree, that this Agreement including its Exhibits, will constitute the Agreement in its entirety between the Parties

regarding the governance and operation of the Charter School as a public charter school and the legal authorization for the establishment of the Charter School under ORS 338.035(2); and

WHEREAS the Oregon Deputy Superintendent of Public Instruction (“Deputy Superintendent”) or designee (as defined in Section 2324.L. of this [Charter Agreement](#)) shall have authority and responsibility for the administration of this Agreement on behalf of the Board, consistent with the provisions of ORS Chapter 326 and ORS Chapter 338.

NOW, THEREFORE, in consideration of the foregoing Recitals and the mutual understandings, releases, covenants and exchange of promises herein described, the Parties agree as follows:

*(The remainder of this page has been left blank intentionally. Agreement to follow.)*

## AGREEMENT

1. **Grant of Charter Agreement.** The Board is the sponsor of the Charter School and authorizes this Charter School, in accordance with ORS Chapter 338 and the terms and conditions of this Agreement, to operate a single public charter school.
2. **Establishment of Charter School.** The Parties agree that (1) ORS chapter 338, now or as amended, strictly apply to and are incorporated into this Agreement and shall supersede and control any conflicting language contained in this Agreement, including the Description of Educational Program (Exhibit A) except proposal for any waivers permitted and granted under ORS 338.025; (2) the provisions of this Agreement shall supersede and control any conflicting language contained in the Description of Educational Program; and (3) the provisions of ORS chapter 338, the Board resolutions and this Agreement supersede and control any prior understandings written or oral with the Board regarding Charter School.
3. **Compliance with Laws.** Charter School represents and warrants that this Agreement does not violate any existing agreements or contracts with third parties. Charter School represents and warrants that its articles and bylaws provide for the operation of a public charter school in a manner consistent with this Agreement. Charter School shall amend the articles and bylaws, if necessary, to comply with this Agreement or amendments to this Agreement. Charter School shall notify in writing the Deputy Superintendent or designee of any changes to its articles of incorporation or bylaws no later than 15 business days after making any such changes.
4. **Authority of the Charter School Board.** The Charter School shall constitute and maintain a governing board (“Charter Board”) that may exercise all power necessary to carry out the responsibilities of the Charter School’s compliance with applicable laws rules regulations, policies, procedures, the terms and conditions of this Agreement and the Description of Educational Program (Exhibit A). Subject to ORS 338.115 and other applicable law, Charter School’s powers shall include, but are not limited to, making all personnel decisions, including hiring, firing and discipline of teachers, supervisors and staff; making decisions to increase number of classrooms per grade level; contracting for goods and services necessary for the operation of Charter School; preparing a budget; procuring insurance and necessary bonds; acquiring facilities for school purposes; purchasing, leasing or renting furniture, equipment or supplies; retaining fees collected from students in accordance with law; organizing and carrying out fund-raising efforts; and accepting and expending gifts, donations or grants of any kind in accordance with such conditions prescribed by the donor as are consistent with law and not contrary to any of the terms of this Agreement.
5. **Use of Appropriate Policies.** In order to facilitate the most efficient and collaborative educational services for students and to maintain an effective relationship with the Board, Charter School shall:

- A. Adopt policies, rules and procedures as required by this Agreement and law;
  - B. Furnish to the Deputy Superintendent or designee copies of all written policies, rules and procedures it may adopt with respect to any matter relating to its operations and educational program; and
  - C. Within 30 calendar days of any change to the policies, rules and procedures submitted to the Deputy Superintendent in accordance with this Section 5, Charter School shall provide a copy of the revised policies, rules and procedures to the Deputy Superintendent or designee.
6. **Effective Date; Term; Renewal.** This Agreement shall legally authorize the continued operation of the Charter School, commencing July 1, 2023 (the “Effective Date”) and expiring on June 30, 2033 (the “Expiration Date”). The process for renewal of this Agreement beyond the Expiration Date shall occur pursuant to ORS 338.065, as amended. In addition to any renewal criteria established by statute or administrative rule and applicable at the time the Charter School applies for renewal, the Board shall base the charter renewal decision on a good faith evaluation of whether the Charter School is (i) in compliance with ORS 338 and applicable state and federal laws; (ii) is in compliance with this Agreement; (iii) is meeting or working toward meeting student performance goals, including, but not limited to, the evaluation of student Academic Performance from the Charter School Performance Framework, (iv) is fiscally stable and using a sound financial management system as described in this Agreement and (v) is in compliance with the outcomes from the annual evaluations of the Charter School Performance Framework (Exhibit B).
7. **Contracting.**
- A. Any agreement or contract that Charter School enters into with a person or public body, as defined in ORS chapter 174, shall include a provision that any obligations incurred under such agreement or contract are solely the responsibility of Charter School. The Charter School further agrees that any legal or contractual obligations that it may incur in its operation under this Agreement are the sole responsibility of Charter School and are not the responsibility of ODE, the Board, or the State of Oregon.
  - B. Charter School shall include a report of all contracts over [the small procurement dollar amount of ORS 279B.065, \(\\$10,000.00\)](#), which are subject to procurement procedures under Oregon Public Contracting Law, entered into by Charter School in the annual report required in Section 14.A. The report shall include at a minimum the names of each vendor, amount of contract(s), scope of work, length of the contract(s), date of Charter Board’s approval, and status of current contract.

8. **Operational Powers.** Subject to the conditions and provisions of this Agreement, Charter School shall be solely responsible for Charter School’s operations and for the actions of its agents, officers, and employees, as well as any subcontractors and the agents, officers, and employees thereof.
9. **Waiver of Laws.** Charter School may seek a waiver of laws from the Board according to the same process and decision-making criteria of the Board as all charter schools pursuant to ORS 338.025.
10. **Disclaimer.** Charter School shall not in oral and written communications indicate that it speaks or acts on behalf of the Board, Deputy Superintendent or ODE.
11. **Requests and Reports.**
  - A. Charter School shall provide any reports, formal or informal, written or oral requested in good faith and for a reasonable purpose by the Board, Deputy Superintendent or designee. The Board, Deputy Superintendent and the designee shall authorize Charter School at least 15 business days to comply with any requests for any reports.
  - B. Charter School shall, no less than monthly, report attendance data in writing to the Deputy Superintendent or designee in accordance with the requirements of the Deputy Superintendent.
12. **Ex Officio Participation.** Charter School shall permit ODE staff or designee of the Deputy Superintendent to attend and participate ex officio at all regular Charter Board meetings, except for executive sessions of the Charter Board as authorized in ORS 192.660. Charter School may invite ODE staff or designee of the Deputy Superintendent to attend executive sessions as appropriate or necessary.
13. **Education Program, Student Performance Standards, and Curriculum.** Charter School shall comply with all state laws and rules that apply to charter schools pertaining to educational programs, pupil performance standards and curriculum.
  - A. Education Program and Curriculum. Charter School shall implement the instructional programs as outlined in the Description of Education Program (Exhibit A). Charter School shall ensure that Charter School’s educational program is designed and implemented in a manner consistent with this Charter Agreement and ORS chapter 338, including, without limitation, requirements regarding content standards, pursuant to ORS 329.045.
  - B. Student Performance. Charter School shall make progress toward meeting or exceeding annual student academic performance expectations as described in Charter School Performance Framework (Exhibit B) including all standards required by the Every Student Succeeds Act (ESSA) and ensuing assessment requirements adopted by the Board, the United States Department of

Education, or the Oregon Legislature to implement ESSA. The Board shall consider Charter School comments on the Performance Framework when considering whether student performance expectations have been met.

- C. School Improvement Plans. If Charter School does not meet or exceed in a school year the indicators of student performance expectations in Section 13.B. above as compared to the prior school year, the Board may require Charter School to develop and submit a school improvement plan. Charter School designee may submit a draft school improvement plan to the Board designee for comment by the Board designee prior to submission to the Board.
- D. Required Instructional Time. Charter School shall annually adopt and implement a school calendar that establishes requirements for instructional time provided by a school during each day or during a year in accordance with ORS 338.115 and OAR 581-022-2320 that requires a minimum number of instructional hours annually. By October 15 of each year, Charter School shall report to ODE the percent of the total students scheduled to receive annually the minimum hours of instructional time as required by OAR 581-022-2320. Charter School shall calculate instruction time in accordance with standards established by the Board by rule, as amended from time to time.
- E. Records. Charter School shall comply with all applicable federal and state laws concerning the maintenance, retention, and disclosure of all operational records and of student records.
- F. Nondiscrimination Standards. The educational program of Charter School shall not violate ORS 659.850 and shall not discriminate against any student or staff on the basis of race, color, age, sex, national origin, marital status, religion, sexual orientation, gender identity, or disability.
- G. Enrollment Requirements.
  - (i) Enrollment shall be open to any eligible child who resides within the Portland School District boundaries. Additionally, enrollment shall be open to children not residing within the district in accordance with ORS 338.125.
  - (ii) Charter School shall 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.
  - (iii) Charter School may conduct a weighted admission lottery in compliance with ORS 338.125(3)(a).
  - (iv) Charter School may give priority admission to students according to ORS 338.125(3)(c).

- (v) Charter School may give priority admission to children of Charter School employees.
  - (vi) Charter School must maintain an active enrollment of at least 25 students.
  - (vii) Active enrollment for purposes of this Agreement shall mean “active roll” as that term is defined and used in OAR 581-023-0006. The process of application, enrollment and admissions shall be governed by ORS 338.125.
  - (viii) For each school year between June 30, 2023 and July 1, 2033, enrollment shall be limited to grades K-8 with a maximum annual enrollment of 420 students.
- H. Student Registration. Charter School shall complete a student registration form, beginning, according to the Charter School calendar, on the first day of school of each school year and ending on the last day of school of each school year, for each student upon admittance to Charter School and update the form according to OAR 581-023-0006 when a student withdraws. Charter School shall mark a student as withdrawn from the active roll on the school day following withdrawal; provided that Charter School must mark a student as withdrawn from the active roll on the day following the tenth consecutive day of absence. Student enrollment shall be reported to the Deputy Superintendent or designee not later than September 15 of each year of this [Charter Agreement](#).
- I. Education of Students under the Individuals with Disabilities Education Act (IDEA). Charter School will comply with state and federal law concerning IDEA and all IDEA policies of Portland Public School District applicable to students at the Charter School.
- J. Enrollment of Special Education Students. Charter School shall admit students without regard to their status as special education students. The students’ Individualized Education Program (IEP) team shall determine modifications and accommodations as necessary.

#### **14. Evaluation of Student Performance and Annual Report.**

- A. Charter School shall provide to the Deputy Superintendent or designee, and parents the annual written report required by ORS 338.095 on or before January 30 of each year of this Agreement , to include a report of progress on the plan to improve student performance. The format and contents of the annual report and the plan to improve student performance will be determined by and agreed upon by the Parties.
- B. Charter School shall administer all the State of Oregon assessments required for its students in accordance with ORS 329.485 and 338.115 and OAR 581-022-2100. Results of these assessments shall be made available to the parents

of Charter School students and to the Deputy Superintendent or designee within 30 calendar days of Charter School receipt of the results from the assessments.

- C. The Deputy Superintendent may designate, and shall bear the entire cost of, an external entity to evaluate the academic, operational, and financial success of the Charter School. The external evaluation shall be conducted within a mutually agreeable time period and in a manner as to not interfere unreasonably with the operation of the school or with performance of duties of Charter School staff. The Deputy Superintendent or designee will provide Charter School with notice of the scope of the evaluation and the Charter School will have 30 days to provide feedback on the scope. Charter School shall cooperate fully in such evaluation, including the provision of all requested data.
- D. Members of the Board and the Deputy Superintendent, or designee, may visit Charter School at any time during normal business hours for purposes of monitoring the progress of the implementation of this Agreement.
  - (i) Visits by the Deputy Superintendent, or designee may not interfere unreasonably with the operation of the Charter School or with performance of duties by Charter School staff, unless the visit is regarding issues of health and safety.
  - (ii) On a mutually agreed upon date, there shall be at least one annual on-site visit by the Board or the Board's designee to review compliance with the provisions of this Agreement and to review growth in student achievement.

## **15. Governance and Operation.**

- A. Charter School shall operate in all respects, as a nonsectarian, nonreligious public charter school. Charter School shall not be affiliated with any nonpublic sectarian school or religious organization.
- B. If Charter School provides daily food service, Charter School shall ensure persons involved in providing the food service possess the appropriate food handlers' certification.
- C. Charter School shall maintain a policy and process for complaints that meets or exceeds the process required in OAR 581-022-2370, as amended from time to time. Charter School shall post the policy on the Charter School's website and provide a copy of the policy to all parents of students attending the Charter School each school year.

- D. Charter School shall ensure that all Charter Board members receive board and ethics training. The Charter Board shall use the Oregon Government Ethics Commission training programs, or a comparable program ~~approved by the Board~~. Each member of the Charter Board shall submit to ODE a signed acknowledgment of understanding provided by ODE and consistent with ORS 338.095(5) within 30 calendar days of the beginning ~~of his or her~~ member's term.
- E. Charter School shall not allow an individual to serve on the Charter School board of directors for whom a criminal records check consistent with ORS 326.607 has not been initiated or who has been convicted of an offense that would preclude that individual from volunteering in a public school in Oregon.
- F. Charter School shall provide written notice to the Board of any legal action or suit filed against Charter School, Charter Board, or their respective employees, members, or agents within 15 business days of notice of such action or suit.

## 16. Funding and Budget.

- A. In accordance with ORS 338.155, Charter School shall enter into an agreement with the Portland School District for funding equal to 90% for all Charter School students enrolled in kindergarten through eighth grade and 95% for all Charter School students enrolled in grades nine through twelve of the amount of Portland School District General Purpose Grant per ADMw as calculated under ORS 327.013. Charter School shall provide a copy of this agreement and any amendments to this agreement to the Deputy Superintendent or designee within 30 calendar days of the Effective Date of the agreement or amendment, unless the Parties agree to an extension, and by July 1 of each subsequent year during the term of this Agreement.
- B. Charter School shall operate on a July 1-June 30 fiscal year basis. On or before June 30 of each year of this Agreement, Charter School shall submit to the Deputy Superintendent or designee Charter School's budget for the upcoming fiscal year.
- C. It is the intent of the Board that Charter School receive a proportionate share of state, local and federal grant funding, to the extent that Charter School is entitled to such funding, complies with the conditions and requirements of such grants and applicable law, and fulfills the reporting requirements for such funding. Charter School's receipt of such federal and state resources or categorical aid shall be contingent on Charter School's compliance with federal and state statutes and regulations regarding entitlement to such resources. The Board will not interfere with, and this provision shall not be construed to limit, Charter School's ability to apply for grants available to charter schools and nonprofit organizations and to retain the entire amount of such grants received less any administrative or other costs specifically permitted to be

withheld from Charter School for such services provided to Charter School pursuant to state, federal or local law.

- D. Charter School shall act as its own fiscal agent; provided, however, the Board agrees to act as Charter School’s fiscal agent for the sole purpose of making payment, and providing access, to Oregon School Board Association services.

**17. Financial Records and Annual Audit.**

- A. Charter School shall establish, maintain, and retain appropriate financial records relating to Charter School for 7 years, or for such longer time as required by law, and to make such records available to the Deputy Superintendent within 7 business days upon written request.
- B. Charter School shall retain a certified public accountant to conduct an annual municipal audit of Charter School in accordance with State law requirements pursuant to ORS 338.115. Charter School shall submit the audit and all management letters (i.e. SAS-114 letter and SAS-115 letter) to the Deputy Superintendent or designee no later than December 31 of each year of this ~~Charter Agreement~~. The audit shall be submitted to the Deputy Superintendent in accordance with the format of the State Chart of Accounts required of Oregon public school districts.
- C. Charter School shall provide quarterly written financial reports of Charter School to the Deputy Superintendent or designee that track expenditures for the fiscal year and shall be subject to a review of its operations and finances by the Deputy Superintendent or designee. Charter School shall adopt fiscal policies and procedures to maintain a sound financial management system that meets the requirements of OAR 581-026-0200.

**18. Termination.**

- A. The Board may terminate the Agreement for any grounds stated in ORS 338.105 including, but not limited to, the following:
  - (i) Charter School’s failure to meet the requirement of ORS chapter 338 except as provided in subparagraph (iii) below, provided, however, that any such failure shall be due to Charter School’s actions or inactions and not due to actions or inactions of the Board, Deputy Superintendent or designee, or of the actions or inactions of any school district contracting with Charter School.
  - (ii) Charter School’s failure to meet student performance standards as set forth in Section 13.B. and C.
  - (iii) Charter School’s failure to correct after notification by the Board, Deputy Superintendent or designee a violation of a federal or state law that is described in ORS 338.115.

- (iv) Charter School’s failure to maintain insurance as described in Exhibit C.
  - (v) Charter School’s failure to maintain financial stability or to meet generally accepted standards of fiscal management provided that Charter School has failed to follow a plan to correct deficiencies as described at ORS 338.105(2)(b).
  - (vi) Charter School’s insufficient enrollment of students below the minimum required by ORS 338.115.
  - (vii) Charter School’s endangering the health or safety of the students enrolled in Charter School.
- B. In accordance with ORS chapter 338, Charter School may only terminate the Agreement or close the school at the end of a semester and after notifying the Deputy Superintendent in accordance with Section 23.E of this Agreement at least 180 calendar days prior to the proposed effective date of the termination or closure. In the event Charter School should permanently cease operations for whatever reason, including the nonrenewal or revocation of this Charter Agreement:
- (i) Charter School shall inventory all assets and provide such inventory to the Board;
  - (ii) The assets purchased with public funds under this Agreement shall be given to the Board; and
  - (iii) All student education records shall be transferred to Portland School District as required by ORS 338.105.
- C. In executing the obligations and rights of termination under ORS chapter 338.105, the parties agree to first make a good faith attempt to resolve any dispute regarding the operation of the Agreement in the following manner:
- (i) The party with a concern regarding the other party’s compliance with the Agreement will notify the other party in writing of the concern.
  - (ii) The responding party shall submit a written response to the concern within thirty (30) days of the receipt of the same.
  - (iii) The termination provisions contained in ORS 338.105 may proceed if the parties are unable to agree in good faith to a resolution of the concern within thirty (30) days of the receipt of the response.
  - (iv) The time frames set forth in sections (ii) and (iii) of this paragraph may be extended by mutual agreement of the parties.
- D. The dispute resolution process set forth in this Section shall not be required prior to the exercise of any contractual right conferred upon either the Board or Charter School under this Agreement except the dispute resolution process shall be required for the contractual right of termination under Section 18A of

this Agreement. The parties further agree the Board reserves the right, without exhausting the good-faith resolution process described in this Section, to immediately invoke the health and safety termination provisions of ORS 338.105 with respect to this Agreement.

## 19. Employment Matters.

- A. Personnel. Charter School shall be the employer of persons on the staff at the Charter School. Charter School may also enter into contracts to provide services to the Charter School or to fulfill responsibilities of Charter School under this Agreement. Persons employed by the Charter School or contractors that provide services to the Charter School are not, and shall not be considered, employees of the State of Oregon. The State of Oregon, including the Board, Deputy Superintendent, and ODE, will not, and shall not have any obligation to, collectively bargain with Charter School employees, nor shall such employees be eligible for inclusion in any bargaining unit containing state employees. Charter School shall be solely responsible for initiating appropriate criminal background checks in accordance with Section 19.C. of this Agreement no later than the first day of instruction of each year of this Charter or prior to execution of any subcontract agreement. Charter School shall be solely responsible for any legal liability or claims resulting from or arising out of acts of Charter School staff.
- B. Staff Licensure and Registration. All of Charter School's teaching and administrative staff must possess a valid Oregon registration. Consistent with ORS 338.135, at least 50% of Charter School's full time equivalent of teachers and administrative staff must possess a valid Oregon teaching or administrative license. By the first instructional day of each year, Charter School shall submit to the Deputy Superintendent or designee a written list of all teachers and administrators employed by Charter School designating the licenses, endorsements, degrees, and qualifications of the same. Charter School shall provide the same information to the Deputy Superintendent or designee with respect to any new hire of a teacher or administrator by Charter School during the course of each year within 30 calendar days after such hire. All teaching and administrative staff must be licensed or registered prior to employment.
- C. Criminal Background Checks. Charter School shall comply with ORS 338.115 and ORS 326.603. No later than the first instructional day of each school year that Charter School operates as a public charter school under this [Charter Agreement](#), Charter School shall provide to the Deputy Superintendent or designee a list containing the names and job positions of all its employees. Such a list shall also indicate for each new employee hired that year the date of initiation of the criminal background investigation required by Oregon law.

- D. Sexual Conduct. Charter School shall comply with ORS 339.370, 339.374, 339.378, 339.384, 339.388, 399.392, and 339.400.
- E. Child Abuse Training and Prevention. In accordance with ORS 339.370, 339.372, 339.375 and 339.377, Charter School shall establish and maintain a policy on the reporting of child abuse and shall provide training on the prevention and identification of child abuse to school employees and students. In addition, Charter School shall make the training available to Charter Board members, parents and legal guardians of students.
- F. Employee Records. Charter School shall establish and maintain personnel records for its employees in compliance with all applicable federal and state laws concerning the maintenance, retention and disclosure of employee records, including but not limited to, ORS 342.850(8) regarding disclosure of employees' personnel file. Charter School shall adopt rules and policies governing access to personnel files.
- G. Public Employees Retirement System (PERS). Charter School shall participate in PERS and shall make appropriate contributions consistent with the applicable PERS policies, procedures, and regulations.
- H. Unemployment. Charter School shall comply with ORS 657.505(7)(a) and will be responsible for unemployment benefits.

**20. Insurance.** Charter School shall at all times maintain and keep in force the insurance specified in Exhibit C.

**21. Legal Liabilities and Indemnification.**

- A. Charter School is a Separate Legal Entity. Charter School may sue or be sued as a separate legal entity apart from the Board, and the Board has no responsibility to indemnify Charter School in any fashion with respect to Charter School activities except as provided in this Agreement.
- B. Charter School's Indemnification Obligations. Subject to the Oregon Tort Claims Act (ORS 30.260 through 30.300), Charter School agrees to indemnify and hold harmless within the limits of and subject to the restrictions in the Tort Claims Act, the Board, ODE and the Deputy Superintendent and their agents and employees from all liability, claims and demands on account of injury, loss or damage, including, without limitation, claims arising from (1) the possession, occupancy or use of property of Charter School (including after school use of buildings by outside groups) its faculty, students, patrons, employees, guests, subcontractors or agents; (2) civil rights violations, including Section 504 of the Rehabilitation Act of 1973, provided, however, the Charter shall not be required to indemnify the Board, ODE and the Deputy Superintendent and their agents and employees for any such liability arising

out of the wrongful acts of the Board, ODE and the Deputy Superintendent and their agents and employees. Charter School further agrees to indemnify and defend the Board and the State of Oregon and their respective officers, employees, and agents against all claims, suits, actions, losses, damages, liabilities, costs and expenses of any nature arising out of, or relating to, the acts or omissions of Charter School or its officers, employees, subcontractors or agents under this Agreement.

- C. Board's Indemnification Obligations. Subject to the limitations of Article XI, § 7 of the Oregon Constitution and the Oregon Tort Claims Act (ORS 30.260 through 30.300), the Board agrees to indemnify, and hold harmless within the limits of and subject to the restrictions in the Tort Claims Act, the Charter School against any liability for personal injury or damage to life or property arising from the Board's negligent activity under this Agreement provided, however, the Board shall not be required to indemnify the Charter School for any such liability arising out of the wrongful acts of Charter School, its officers, employees or agents. Notwithstanding those general limitations, the Board assumes no liability for any loss or injury, resulting from:
- (i) Any acts or omissions of Charter School, its Charter Board, trustees, agents, employees or volunteers;
  - (ii) Any use and occupancy of the building occupied by Charter School or any matter in connection with the condition of such building, except if the condition of such building is due to the action, inaction or negligence of the Board, ODE and the Deputy Superintendent and their agents and employees ; or
  - (iii) Any debt or contractual obligation incurred by Charter School.

**22. School Location.** Charter School shall be responsible for maintaining a facility located within the Portland School District boundaries for the operation of the Charter School. At all relevant times and during all operations under this Agreement, Charter School shall ensure that the location and use of the facility complies with all applicable local, state, and federal laws and regulations, including but not limited to those relating to accessibility and student safety. Charter School shall ensure it complies with all such applicable laws during the term of this Agreement. Charter School may operate a school or facility outside of the Portland School District boundaries if Portland School District agrees to the location. Charter School must provide written approval from Portland School District to the ODE and comply with the notice requirements of ORS 332.158 and OAR 581-026-0600 and all applicable local, state, and federal laws and regulations related to such school or facility, including but not limited to those relating to accessibility and student safety.

**23. Dispute Resolution Mediation.**

- A. If any dispute arises between the Board, Deputy Superintendent or designee and the Charter School concerning this Charter Agreement, including, without

limitation, an allegation of any breach or default, the Parties may agree to mediation of the matter.

- B. At any time during the mediation process, or if the Parties are unable to reach an agreement through mediation, either Party may give notice to the other Party and to the mediator that it is terminating its participation in the mediation.
- C. If the Parties agree to mediate, the Parties shall share equally the fees and expenses of any mediator and each Party shall pay its own expenses incurred in any mediation.
- D. This Section does not apply to termination. Decisions related to termination are subject to the process in Section 18 and ORS Chapter 338.

#### **24. General Provisions.**

- A. **Entire Agreement.** This Agreement, with its Exhibits, contains the entire understandings of the Parties, and all prior representations, understandings, and discussions are merged herein and superseded and canceled by this Agreement .
- B. **Nonassignment.** The Parties may not assign any rights or benefits they are entitled to under this Agreement to any entity or individual. This does not limit the right of Charter School to enter into agreements to the full extent allowed under this Agreement and allowed to charter schools under Oregon law.
- C. **Amendment.** This Agreement may only be modified or amended by further written agreement executed by the Parties hereto.
- D. **Governing Law and Enforcement.** This Agreement will be governed and construed according to the laws and regulations of the State of Oregon, including those changed subsequent to the execution of this Agreement.
- E. **Notice.** Except as otherwise expressly provided in this Agreement, any communications between the Parties hereto or notices to be given hereunder must be given in writing by email, personal delivery, facsimile, or mailing the same, postage prepaid, to Charter School or ODE at the email address, postal address or telephone number set forth in this Agreement, or to such other addresses or numbers as either Party may indicate pursuant to this Section 24.E. Any communication or notice so addressed and mailed is effective five business days after mailing. Any communication or notice delivered by facsimile is effective on the day the transmitting machine generates a receipt of the successful transmission, if transmission was during normal business hours, or on the next business day, if transmission was outside normal business hours of the recipient. To be effective against ODE, any notice transmitted by facsimile

must be confirmed by telephone notice to ODE's [Deputy Superintendent's Designee \(Section 24L herein\)](#). Any communication or notice given by personal delivery is effective when actually delivered. Any notice given by email is effective when the sender receives confirmation of delivery, either by return email, or by demonstrating through other technological means that the email has been delivered to the intended email address.

The Cottonwood School of Civics and Science: 0640 S Bancroft Street, Portland, OR 97239, [amandamcadoo@thecottonwoodschool.org](mailto:amandamcadoo@thecottonwoodschool.org) (or any updated email address of the Executive Director)

State Board of Education: 255 Capitol Street NE, Salem, OR 97310, [Guadalupe.Martinez.Z@ode.state.or.us](mailto:Guadalupe.Martinez.Z@ode.state.or.us) (or any updated email address of the State Board of Education Chair)

Oregon Department of Education, Director's Office: 255 Capitol Street NE, Salem, OR 97310, [colt.gill@ode.oregon.gov](mailto:colt.gill@ode.oregon.gov) (or any updated email address of the Superintendent of Public Instruction)

- F. No Third Party Beneficiary. This Agreement shall not create any rights in any third parties who have not entered into this Agreement, nor shall any third party be entitled to enforce any rights or obligations that may be possessed by either Party to this Agreement
- G. Charter School Authority to Enter into Agreement. Charter School expressly affirms the signatories on its behalf who sign below have the authority to enter into this Agreement on behalf of Charter School and the Charter Board has duly approved this Agreement. Charter School shall provide a copy of its written resolution authorizing Charter School to enter into this Agreement.
- H. Severability. If any provision of this Agreement is determined to be unenforceable or invalid for any reason, the remainder of this Agreement shall remain in effect, unless otherwise terminated by one or both of the Parties in accordance with the terms of this Agreement.
- I. This Agreement consists of the following documents, which are incorporated by this reference and listed in descending order of precedence:
  - (i) This Agreement less all exhibits
  - (ii) Exhibit B (Charter School Performance Framework)
  - (iii) Exhibit A (Description of Educational Program)
  - (iv) Exhibit C (Insurance)
- J. Execution in Counterparts. This Agreement may be executed and delivered in counterparts, each of which, when so executed and delivered, shall be effective.

- K. Delegation. The Parties agree and acknowledge the functions and powers of the Board may, at the discretion of the Board, be exercised by the Deputy Superintendent or designee identified in this Agreement. The Parties agree and acknowledge the functions and powers of Charter School and Charter Board may be exercised by the chair of the Charter Board or the administrator of the Charter School. Each Party shall provide notice to the other Party in accordance with Section ~~2324~~24.E. of this Agreement of any change in the person's name and contact information for this delegation. Notwithstanding the above, any ultimate decision about renewal, non-renewal or termination of this Agreement may only be made by the Board.
- L. Deputy Superintendent's Designee. For purposes of this Agreement, and as referenced herein, the Deputy Superintendent's designee is:

Kate Pattison  
Charter School Specialist  
Oregon Department of Education  
255 Capitol St NE, Salem, OR 97310  
[kate.pattison@ode.oregon.gov](mailto:kate.pattison@ode.oregon.gov)  
503-580-5749 (cell)  
503-378-5156 (fax)

*(Signature page to follow.)*

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

EACH PARTY, BY SIGNATURE OF ITS AUTHORIZED REPRESENTATIVE, HEREBY ACKNOWLEDGES IT HAS READ THIS AGREEMENT, UNDERSTANDS IT, AND AGREES TO BE BOUND BY ITS TERMS AND CONDITIONS. The Parties further agree that by the exchange of this Agreement electronically, each has agreed to the use of electronic means, if applicable, instead of the exchange of physical documents and manual signatures. By inserting an electronic or manual signature below, each authorized representative acknowledges that it is their signature, that each intends to execute this Agreement, and that their electronic or manual signature should be given full force and effect to create a valid and legally binding agreement

**STATE OF OREGON acting by and through its DEPARTMENT OF EDUCATION**

\_\_\_\_\_  
XXXXX, Contracting Officer \_\_\_\_\_  
Date

**OREGON STATE BOARD OF EDUCATION**

\_\_\_\_\_  
Signature \_\_\_\_\_  
Date

\_\_\_\_\_  
Printed Name, Title

**CHARTER SCHOOL**

\_\_\_\_\_  
Signature \_\_\_\_\_  
Date

\_\_\_\_\_  
Printed Name, Title

**CHARTER BOARD**

\_\_\_\_\_  
Signature \_\_\_\_\_  
Date

\_\_\_\_\_  
Printed Name, Title

**EXHIBIT A**  
**DESCRIPTION OF EDUCATIONAL PROGRAM**

The Cottonwood School of Civics and Science  
Educational Program

The Cottonwood School of Civics and Science is a small, public charter school, serving kindergarten through eighth-grade students in the Portland area.

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, the school provides opportunities to build relationships locally, learn from indigenous knowledge and build connections to the natural world. 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. To do this we must spend more time in both natural and cultivated areas. 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.

**EXHIBIT B**  
**CHARTER SCHOOL PERFORMANCE FRAMEWORK**

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

**The Cottonwood School of Civics and Science**  
**2023-2033**



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

**Prepared by Kate Pattison**  
**Charter School Specialist**

## 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”.<sup>1</sup>

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  
Charter School Specialist  
Oregon Department of Education

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<sup>1</sup> From NACSA’s Core Performance Framework and Guidance.

### **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 Accountability Reports (e.g. Accountability Detail Sheet)
- The charter school’s agreement
- 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 Accountability Reports (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 non-graduate rate (where applicable)
- The district’s non-graduate rate (where applicable)
- The graduation, completion, and non-graduate 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. Student Academic Achievement**

##### **Measure 1a**

How are <b>Economically Disadvantaged</b> students achieving on state assessments in ELA compared to the <b>Economically Disadvantaged</b> students in the district?
<b>Exceeds expectations:</b> <input type="checkbox"/> 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%.
<b>Meets expectations:</b> <input type="checkbox"/> 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%.
<b>Does not meet expectations:</b> <input type="checkbox"/> 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%.
<b>Falls far below expectations:</b> <input type="checkbox"/> 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:
School comments:

Measure 1b How are <b>Economically Disadvantaged</b> students achieving on state assessments in MATH compared to the <b>Economically Disadvantaged</b> students in the district?
<b>Exceeds expectations:</b> <input type="checkbox"/> 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%.
<b>Meets expectations:</b> <input type="checkbox"/> 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%.
<b>Does not meet expectations:</b> <input type="checkbox"/> 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%.

<b><i>Falls far below expectations:</i></b>
<input type="checkbox"/> 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:
School comments:

<b>Measure 1c</b>
How are <b>English Learners</b> achieving on state assessments in ELA compared to the <b>English Learners</b> in the district?
<b><i>Exceeds expectations:</i></b>
<input type="checkbox"/> 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%.
<b><i>Meets expectations:</i></b>
<input type="checkbox"/> 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%.
<b><i>Does not meet expectations:</i></b>
<input type="checkbox"/> 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%.
<b><i>Falls far below expectations:</i></b>
<input type="checkbox"/> 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:
School comments:

<b>Measure 1d</b>
How are <b>English Learners</b> achieving on state assessments in MATH compared to the <b>English Learners</b> in the district?

<p><b>Exceeds expectations:</b></p> <p><input type="checkbox"/> 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%.</p>
<p><b>Meets expectations:</b></p> <p><input type="checkbox"/> 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%.</p>
<p><b>Does not meet expectations:</b></p> <p><input type="checkbox"/> 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%.</p>
<p><b>Falls far below expectations:</b></p> <p><input type="checkbox"/> 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.</p>
<p>State Board of Education comments:</p>
<p>School comments:</p>

<p><b>Measure 1e</b></p> <p>How are <b>Students with Disabilities</b> achieving on state assessments in ELA compared to the <b>Students with Disabilities</b> in the district?</p>
<p><b>Exceeds expectations:</b></p> <p><input type="checkbox"/> 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%.</p>
<p><b>Meets expectations:</b></p> <p><input type="checkbox"/> 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%.</p>
<p><b>Does not meet expectations:</b></p> <p><input type="checkbox"/> 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%.</p>
<p><b>Falls far below expectations:</b></p> <p><input type="checkbox"/> School’s average subgroup achievement rate is less than the average district performance</p>

of students in the same subgroup in the same grades by 10% or more.
State Board of Education comments:
School comments:

<b>Measure 1f</b> How are <b>Students with Disabilities</b> achieving on state assessments in MATH compared to the <b>Students with Disabilities</b> in the district?
<b>Exceeds expectations:</b> <input type="checkbox"/> 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%.
<b>Meets expectations:</b> <input type="checkbox"/> 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%.
<b>Does not meet expectations:</b> <input type="checkbox"/> 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%.
<b>Falls far below expectations:</b> <input type="checkbox"/> 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:
School comments:

<b>Measure 1g</b> How are <b>Students of Underserved Races/Ethnicities</b> achieving on state assessments in ELA compared to the <b>Students of Underserved Races/Ethnicities</b> in the district?
<b>Exceeds expectations:</b> <input type="checkbox"/> 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%.
<b>Meets expectations:</b> <input type="checkbox"/> 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%.
<b>Does not meet expectations:</b> <input type="checkbox"/> 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%.
<b>Falls far below expectations:</b> <input type="checkbox"/> 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:
School comments:

<b>Measure 1h</b> How are <b>Students of Underserved Races/Ethnicities</b> achieving on state assessments in MATH compared to the <b>Students of Underserved Races/Ethnicities</b> in the district?
<b>Exceeds expectations:</b> <input type="checkbox"/> 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%.
<b>Meets expectations:</b> <input type="checkbox"/> 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%.
<b>Does not meet expectations:</b> <input type="checkbox"/> 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%.
<b>Falls far below expectations:</b> <input type="checkbox"/> 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:
School comments:

## 2. Student Academic Growth

<b>Measure 2a</b> Are All students making expected annual academic growth in ELA compared to their peers? (3-year Combined Median Growth Percentile)
<b>Exceeds expectations:</b> <input type="checkbox"/> Combined median growth percentile of 60 or more.
<b>Meets expectations:</b> <input type="checkbox"/> Combined median growth percentile of between 45 and 59.5.
<b>Does not meet expectations:</b> <input type="checkbox"/> Combined median growth percentile of between 40 and 44.5.
<b>Falls far below expectations:</b> <input type="checkbox"/> Combined median growth percentile of lower than 40.
State Board of Education comments:
School comments:

<b>Measure 2b</b> Are students making expected annual academic growth in MATH compared to their peers? (3-year Combined Median Growth Percentile)
<b>Exceeds expectations:</b> <input type="checkbox"/> Combined median growth percentile of 60 or more.
<b>Meets expectations:</b> <input type="checkbox"/> Combined median growth percentile of between 45 and 59.5.

<p><b>Does not meet expectations:</b></p> <p><input type="checkbox"/> Combined median growth percentile of between 40 and 44.5.</p>
<p><b>Falls far below expectations:</b></p> <p><input type="checkbox"/> Combined median growth percentile of lower than 40.</p>
<p>State Board of Education comments:</p>
<p>School comments:</p>

### 3. Subgroup Growth

<p><b>Measure 3a</b></p> <p>Is the school increasing academic performance in ELA over time for <b>Economically Disadvantaged</b> students? (3-year Combined Median Growth Percentile)</p>
<p><b>Exceeds expectations:</b></p> <p><input type="checkbox"/> Combined median growth percentile of 60 or more.</p>
<p><b>Meets expectations:</b></p> <p><input type="checkbox"/> Combined median growth percentile of between 45 and 59.5.</p>
<p><b>Does not meet expectations:</b></p> <p><input type="checkbox"/> Combined median growth percentile of between 40 and 44.5.</p>
<p><b>Falls far below expectations:</b></p> <p><input type="checkbox"/> Combined median growth percentile of lower than 40.</p>
<p>State Board of Education comments:</p>
<p>School comments:</p>

<p><b>Measure 3b</b></p> <p>Is the school increasing academic performance in MATH over time for <b>Economically Disadvantaged</b> students? (3-year Combined Median Growth Percentile)</p>
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<b>Exceeds expectations:</b> <input type="checkbox"/> Combined median growth percentile of 60 or more.
<b>Meets expectations:</b> <input type="checkbox"/> Combined median growth percentile of between 45 and 59.5.
<b>Does not meet expectations:</b> <input type="checkbox"/> Combined median growth percentile of between 40 and 44.5.
<b>Falls far below expectations:</b> <input type="checkbox"/> Combined median growth percentile of lower than 40.
State Board of Education comments:
School comments:

<b>Measure 3c</b> Is the school increasing academic performance in ELA over time for <b>English Learner</b> students? (3-year Combined median Growth Percentile)
<b>Exceeds expectations:</b> <input type="checkbox"/> Combined median growth percentile of 60 or more.
<b>Meets expectations:</b> <input type="checkbox"/> Combined median growth percentile of between 45 and 59.5.
<b>Does not meet expectations:</b> <input type="checkbox"/> Combined median growth percentile of between 40 and 44.5.
<b>Falls far below expectations:</b> <input type="checkbox"/> Combined median growth percentile of lower than 40.
State Board of Education comments:
School comments:

**Measure 3d**

Is the school increasing academic performance in MATH over time for **English Learner** students? (3-year Combined median Growth Percentile)

**Exceeds expectations:**

Combined median growth percentile of 60 or more.

**Meets expectations:**

Combined median growth percentile of between 45 and 59.5.

**Does not meet expectations:**

Combined median growth percentile of between 40 and 44.5.

**Falls far below expectations:**

Combined median growth percentile of lower than 40.

State Board of Education comments:

School comments:

**Measure 3e**

Is the school increasing academic performance in ELA over time for **Students with Disabilities?** (3-year Combined Median Growth Percentile)

**Exceeds expectations:**

Combined median growth percentile of 60 or more.

**Meets expectations:**

Combined median growth percentile of between 45 and 59.5.

**Does not meet expectations:**

Combined median growth percentile of between 40 and 44.5.

**Falls far below expectations:**

Combined median growth percentile of lower than 40.

State Board of Education comments:
School comments:

<b>Measure 3f</b> Is the school increasing academic performance in MATH over time for <b>Students with Disabilities?</b> (3-year Combined Median Growth Percentile)
<b>Exceeds expectations:</b> <input type="checkbox"/> Combined median growth percentile of 60 or more.
<b>Meets expectations:</b> <input type="checkbox"/> Combined median growth percentile of between 45 and 59.5.
<b>Does not meet expectations:</b> <input type="checkbox"/> Combined median growth percentile of between 40 and 44.5.
<b>Falls far below expectations:</b> <input type="checkbox"/> Combined median growth percentile of lower than 40.
State Board of Education comments:
School comments:

<b>Measure 3g</b> Is the school increasing academic performance in ELA over time for students of <b>Underserved Races/Ethnicities?</b> (3-year Combined Median Growth Percentile)
<b>Exceeds expectations:</b> <input type="checkbox"/> Combined median growth percentile of 60 or more.
<b>Meets expectations:</b> <input type="checkbox"/> Combined median growth percentile of between 45 and 59.5.
<b>Does not meet expectations:</b>

<input type="checkbox"/> Combined median growth percentile of between 40 and 44.5.
<b><i>Falls far below expectations:</i></b>
<input type="checkbox"/> Combined median growth percentile of lower than 40.
State Board of Education comments:
School comments:

<b>Measure 3h</b> Is the school increasing academic performance in MATH over time for students of <b>Underserved Races/Ethnicities?</b> (3-year Combined Median Growth Percentile)
<b><i>Exceeds expectations:</i></b>
<input type="checkbox"/> Combined median growth percentile of 60 or more.
<b><i>Meets expectations:</i></b>
<input type="checkbox"/> Combined median growth percentile of between 45 and 59.5.
<b><i>Does not meet expectations:</i></b>
<input type="checkbox"/> Combined median growth percentile of between 40 and 44.5.
<b><i>Falls far below expectations:</i></b>
<input type="checkbox"/> Combined median growth percentile of lower than 40.
State Board of Education comments:
School comments:

**4. Alignment of Curriculum to Common Core State Standards**

<b>Measure 4a</b> Is the school aligning curriculum to Common Core State Standards?
<b><i>Meets expectations:</i></b>
<input 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.
<b>Does not meet expectations:</b> <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.
<b>Falls far below expectations:</b> <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:
School comments:

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

<b>Measure 5a</b> What percentage of students is graduating within four years of entering high school as compared to other schools in the district?
<b>Exceeds expectations:</b> <input type="checkbox"/> School's average graduation rate exceeds the average district graduation rate by at least 10%.
<b>Meets expectations:</b> <input type="checkbox"/> School's average graduation rate meets or exceeds the average district graduation rate by up to 10%.
<b>Does not meet expectations:</b> <input type="checkbox"/> School's average graduation rate is less than the average district graduation rate by 1-10%.
<b>Falls far below expectations:</b> <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:

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 expectations:**

School's average graduation rate exceeds the average graduation rate of their peers in like schools by at least 10%.

**Meets expectations:**

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 expectations:**

School's average graduation rate is less than the average graduation rate of their peers in like schools by 1-10%.

**Falls far below expectations:**

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:

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 the district?

**Exceeds expectations:**

School's average completion rate exceeds the average district completion rate by at least 10%.

<p><b>Meets expectations:</b></p> <p><input type="checkbox"/> School's average completion rate meets or exceeds the average district completion rate by up to 10%.</p>
<p><b>Does not meet expectations:</b></p> <p><input type="checkbox"/> School's average completion rate is less than the average district completion rate by 1-10%.</p>
<p><b>Falls far below expectations:</b></p> <p><input type="checkbox"/> School's average completion rate is less than the average district completion rate by 10% or more.</p>
<p>State Board of Education comments:</p>
<p>School comments:</p>

<p><b>Measure 5d</b></p> <p>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?</p>
<p><b>Exceeds expectations:</b></p> <p><input type="checkbox"/> School's average completion rate exceeds the average completion rate of their peers in like schools by at least 10%.</p>
<p><b>Meets expectations:</b></p> <p><input type="checkbox"/> School's average completion rate meets or exceeds the average completion rate of their peers in like schools by up to 10%.</p>
<p><b>Does not meet expectations:</b></p> <p><input type="checkbox"/> School's average completion rate is less than the average completion rate of their peers in like schools by 1-10%.</p>
<p><b>Falls far below expectations:</b></p> <p><input type="checkbox"/> School's average completion rate is less than the average completion rate of their peers in like schools by 10% or more.</p>
<p>State Board of Education comments:</p>

School comments:

**Measure 5e**

What percentage of students did not graduate during the school year and did not re-enroll as compared to other schools in the district?

**Exceeds expectations :**

School's average non-graduate is less than the average district non-graduate by 4% or more.

**Meets expectations :**

School's average non-graduate meets or is less than the average district non-graduate by up to 4%.

**Does not meet expectations:**

School's average non-graduate exceeds the average district non-graduate by 1-4%.

**Falls far below expectations:**

School's average non-graduate exceeds the average district non-graduate by 4% or more.

State Board of Education comments:

School comments:

**Measure 5f**

What percentage of students did not graduate during the school year and did not re-enroll as compared to their peers in like schools?

**Exceeds expectations:**

School's average non-graduate is less than the average non-graduate of their peers in like schools by 4% or more.

**Meets expectations:**

School's average non-graduate meets or is less than the average non-graduate of their peers in like schools by up to 4%.

**Does not meet expectations:**

School's average non-graduate exceeds the average non-graduate of their peers in like schools by 1-4%.

**Falls far below expectations:**

School's average non-graduate exceeds the average non-graduate of their peers in like schools by 4% or more.

State Board of Education comments:

School comments:

**COMMENDATIONS: ACADEMIC PERFORMANCE**

1.

**RECOMMENDATIONS: ACADEMIC PERFORMANCE**

1.

**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 agreement
- 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**

**6. Near-Term Measures**

<p><b>Measure 7a</b></p> <p>Current ratio: Current assets divided by current liabilities.</p>
<p><i>Meets expectations:</i></p> <p><input type="checkbox"/> Current ratio is greater than or equal to 1.1.</p>
<p><i>Does not meet expectations:</i></p> <p><input type="checkbox"/> Current ratio is between .9 and 1.0 or equals 1.0.</p>
<p><i>Falls far below expectations:</i></p> <p><input type="checkbox"/> Current ratio is less than or equal to .9.</p>
<p>State Board of Education comments:</p>
<p>School comments:</p>

<b>Measure 7b</b> Unrestricted days cash: Unrestricted cash divided by (total expenses minus depreciation expense/365).
<b>Meets expectations:</b> <input type="checkbox"/> 60 days cash
<b>Does not meet expectations:</b> <input type="checkbox"/> Days cash is between 15 and 30 days
<b>Falls far below expectations:</b> <input type="checkbox"/> Fewer than 15 days cash
State Board of Education comments:
School comments:

<b>Measure 7c</b> Enrollment variance: actual enrollment divided by enrollment projection in charter school board-approved budget.
<b>Meets expectations:</b> <input type="checkbox"/> Enrollment variance equals or exceeds 95% in the most recent year.
<b>Does not meet expectations:</b> <input type="checkbox"/> Enrollment variance is between 85-95% in the most recent year.
<b>Falls far below expectations:</b> <input type="checkbox"/> Enrollment variance is less than 85% in the most recent year.
State Board of Education comments:
School comments:

<b>Measure 7d</b>
Default
<p><b>Meets expectations:</b></p> <p><input type="checkbox"/> School is not in default of loan covenant(s) and/or is not delinquent with debt service payments.</p>
<p><b>Falls far below expectations:</b></p> <p><input type="checkbox"/> School is in default of loan covenant(s) and/or is delinquent with debt service payments.</p>
<p>State Board of Education comments:</p>
<p>School comments:</p>

**7. Sustainability Measures**

<b>Measure 8a</b>
<p>Total Margin: Net income divided by total revenue.</p> <p>Aggregated total margin: Total 3-year net income divided by total 3-year revenues.</p>
<p><b>Meets expectations:</b></p> <p><input type="checkbox"/> Aggregated 3-year total margin is positive and the most recent year total margin is positive.</p>
<p><b>Does not meet expectations:</b></p> <p><input type="checkbox"/> Aggregated 3-year total margin is greater than -1.5%, but trend does not “meet standard” (above).</p>
<p><b>Falls far below expectations:</b></p> <p><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%.</p>
<p>State Board of Education comments:</p>
<p>School comments:</p>

<b>Measure 8b</b> Debt to asset ratio: Total liabilities divided by total assets.
<b>Meets expectations:</b> <input type="checkbox"/> Debt-to-asset ratio is less than .9.
<b>Does not meet expectations:</b> <input type="checkbox"/> Debt-to-asset ratio is between .9 and 1.0.
<b>Falls far below expectations:</b> <input type="checkbox"/> Debt-to-asset ratio is greater than 1.0.
State Board of Education comments:
School comments:

<b>Measure 8c</b> 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.
<b>Meets expectations:</b> <input type="checkbox"/> Multi-year cumulative cash flow is positive and cash flow is positive each year.
<b>Does not meet expectations:</b> <input type="checkbox"/> Multi-year cumulative cash flow is positive, but trend does not “meet standard” (above).
<b>Falls far below expectations:</b> <input type="checkbox"/> Multi-year cumulative cash flow is negative.
State Board of Education comments:
School comments:

**Measure 8d**

Debt service coverage ratio: (net income + depreciation + interest expense) / (annual principal, interest, and lease payments).

**Meets expectations:**

Debt service coverage ratio is equal to or exceeds 1.1.

**Does not meet expectations :**

Debt service coverage ratio is less than 1.1.

State Board of Education comments:

School comments:

**Measure 8e**

Is the school meeting financial reporting and compliance requirements?

**Meets expectations:**

The school materially complies with applicable laws, rules, regulations, and provisions of the charter agreement relating to financial reporting requirements, including, but not limited to:

- 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.

**Does not meet expectations:**

The school was materially out of compliance with applicable laws, rules, regulations, and/or provisions of the agreement relating to financial reporting requirements, including, but not limited to:

- 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.

State Board of Education comments:

School comments:

**Measure 8f**

Is the school following Generally Accepted Accounting Principles (GAAP)?

**Meets expectations:**

The school materially complies with applicable laws, rules, regulations, and provisions of the agreement 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 expectations:**

The school was materially out of compliance with applicable laws, rules, regulations, and/or provisions of the agreement 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:

School comments:

**COMMENDATIONS: FINANCIAL PERFORMANCE**

1.

## RECOMMENDATIONS: FINANCIAL PERFORMANCE

1.

### **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 agreement
- 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**

#### **8. Education Program**

##### **Measure 10a**

Is the school implementing the material terms of the education program as defined in the current agreement?

**Meets expectations:**

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 agreement, or the school has gained approval for a modification to the material terms.

**Does not meet expectations:**

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 agreement, or the schools implemented a modification to the material terms without approval and/or a mutually agreeable amendment to the agreement.

State Board of Education comments:

School comments:

**Measure 10b**

Is the school complying with applicable education requirements?

**Meets expectations:**

The school materially complies with applicable laws, rules, regulations, and provisions of the agreement 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 expectations:**

The school was materially out of compliance with applicable laws, rules, regulations, and/or provisions of the agreement 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:
School comments:

**Measure 10c**

Is the school protecting the rights of students with disabilities?

**Meets expectations:**

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 agreement (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 expectations:**

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 agreement (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

<ul style="list-style-type: none"><li>● Access to the school’s facility and program to students in a lawful manner and consistent with students’ IEPs or 504 plans</li></ul>
State Board of Education comments:
School comments:

<b>Measure 10d</b>
Is the school protecting the rights of English Language Learner students?
<b>Meets expectations:</b>
<input type="checkbox"/> The school materially complies with applicable laws, rules, regulations, and provisions of the agreement (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: <ul style="list-style-type: none"><li>● Equitable access and opportunity to enroll</li><li>● Development and implementation of required plans related to the service of ELL students</li><li>● Proper steps for identification of students in need of ELL services</li><li>● Appropriate and equitable delivery of services to identified students</li><li>● Appropriate accommodations on assessments</li><li>● Exiting of students from ELL services</li><li>● Ongoing monitoring of exited students</li></ul>
<b>Does not meet expectations:</b>
<input type="checkbox"/> The school failed to comply with one or more applicable laws, rules, regulations, and/or provisions of the agreement (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: <ul style="list-style-type: none"><li>● Equitable access and opportunity to enroll</li><li>● Development and implementation of required plans related to the service of ELL students</li><li>● Proper steps for identification of students in need of ELL services</li><li>● Appropriate and equitable delivery of services to identified students</li><li>● Appropriate accommodations on assessments</li><li>● Exiting of students from ELL services</li><li>● Ongoing monitoring of exited students</li></ul>
State Board of Education comments:

School comments:

### 9. Governance and Reporting

#### Measure 11a

Is the school complying with applicable governance requirements?

##### *Meets expectations:*

The school materially complies with applicable laws, rules, regulations, and provisions of the agreement 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 expectations:*

The school was materially out of compliance with applicable laws, rules, regulations, and/or provisions of the agreement 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:

School comments:

#### Measure 11b

Is the school holding its administration accountable?

##### *Meets expectations:*

The school materially complies with applicable laws, rules, regulations, provisions of the

<p>agreement, and its own internal policies and practices relating to oversight of school administration, including, but not limited to:</p> <ul style="list-style-type: none"> <li>● 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</li> <li>● The board conducting an annual evaluation of the administrator’s performance</li> </ul>
<p><b>Does not meet expectation:</b></p> <p><input type="checkbox"/> The school was materially out of compliance with applicable laws, rules, regulations, provisions of the agreement, and its own internal policies and practices relating to oversight of school administration, including, but not limited to:</p> <ul style="list-style-type: none"> <li>● 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</li> <li>● The board conducting an annual evaluation of the administrator’s performance</li> </ul>
<p>State Board of Education comments:</p>
<p>School comments:</p>

<p><b>Measure 11c</b></p> <p>Is the school complying with reporting requirements?</p>
<p><b>Meets expectations:</b></p> <p><input type="checkbox"/> The school materially complies with applicable laws, rules, regulations, and provisions of the agreement relating to relevant reporting requirements to the district, and the Oregon Department of Education, including, but not limited to:</p> <ul style="list-style-type: none"> <li>● Accountability planning and performance</li> <li>● Attendance and enrollment reporting</li> <li>● Compliance with the agreement and all applicable laws</li> <li>● Timely submission of all deliverables</li> <li>● Additional information as requested by the district</li> </ul>
<p><b>Does not meet expectations:</b></p> <p><input type="checkbox"/> The school was materially out of compliance with applicable laws, rules, regulations, and/or provisions of the agreement relating to relevant reporting requirements to the district, and the Oregon Department of Education, including, but not limited to:</p> <ul style="list-style-type: none"> <li>● Accountability planning and performance</li> </ul>

<ul style="list-style-type: none"><li>● Attendance and enrollment reporting</li><li>● Compliance with the agreement and all applicable laws</li><li>● Timely submission of all deliverables</li><li>● Additional information as requested by the district</li></ul>
State Board of Education comments:
School comments:

## 10. Students and Employees

### Measure 12a

Is the school protecting the rights of all students?

#### *Meets expectations:*

The school materially complies with applicable laws, rules, regulations, and provisions of the agreement 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 expectations:*

The school was materially out of compliance with applicable laws, rules, regulations, and/or provisions of the agreement 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:
School comments:

<b>Measure 12b</b>
Is the school meeting teacher and other staff credentialing requirements?
<b>Meets expectations:</b>
<input type="checkbox"/> The school materially complies with applicable laws, rules, regulations, and provisions of the agreement 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.
<b>Does not meet expectations:</b>
<input type="checkbox"/> The school was materially out of compliance with applicable laws, rules, regulations, and provisions of the agreement 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:

**11. School Environment**

<b>Measure 13a</b>
Is the school complying with facilities and transportation requirements?
<b>Meets expectations:</b>
<input type="checkbox"/> The school materially complies with applicable laws, rules, regulations, and provisions of the agreement relating to the school facilities, grounds, and transportation, including, but not limited to:
<ul style="list-style-type: none"><li>● Americans with Disabilities Act</li><li>● Fire inspections and related records</li><li>● Viable certificate of occupancy or other required building use authorization</li></ul>

<ul style="list-style-type: none"><li>● Documentation of requisite insurance coverage</li><li>● Student transportation</li></ul>
<p><b>Does not meet expectations:</b></p> <p><input type="checkbox"/> The school was materially out of compliance with applicable laws, rules, regulations, and provisions of the agreement relating to the school facilities, grounds, and transportation, including, but not limited to:</p> <ul style="list-style-type: none"><li>● Americans with Disabilities Act</li><li>● Fire inspections and related records</li><li>● Viable certificate of occupancy or other required building use authorization</li><li>● Documentation of requisite insurance coverage</li><li>● Student transportation</li></ul>
State Board of Education comments:
School comments:

<p><b>Measure 13b</b></p> <p>Is the school complying with health and safety requirements?</p>
<p><b>Meets expectations:</b></p> <p><input type="checkbox"/> The school materially complies with applicable laws, rules, regulations, and provisions of the agreement relating to safety and the provision of health-related services, including, but not limited to:</p> <ul style="list-style-type: none"><li>● Appropriate nursing services and dispensing of pharmaceuticals</li><li>● Food service requirements</li></ul>
<p><b>Does not meet expectations:</b></p> <p><input type="checkbox"/> The school was materially out of compliance with applicable laws, rules, regulations, and provisions of the agreement relating to safety and the provision of health-related services, including, but not limited to:</p> <ul style="list-style-type: none"><li>● Appropriate nursing services and dispensing of pharmaceuticals</li><li>● Food service requirements</li></ul>
State Board of Education comments:
School comments:

**Measure 13c**

Is the school handling information appropriately?

**Meets expectations:**

The school materially complies with applicable laws, rules, regulations, and provisions of the agreement 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 expectations:**

The school was materially out of compliance with applicable laws, rules, regulations, and provisions of the agreement 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:

School comments:

**12. Additional Obligations**

**Measure 14a**

Is the school complying with all other obligations?

**Meets expectations:**

The school materially complies with all other applicable legal, statutory, regulatory, or contractual requirements contained in the agreement 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 expectations:**

The school was materially out of compliance with applicable legal, statutory, regulatory, or contractual requirements contained in the agreement that are not otherwise explicitly stated herein, including, 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:

School comments:

**COMMENDATIONS: ORGANIZATIONAL PERFORMANCE**

1.

**RECOMMENDATIONS: ORGANIZATIONAL PERFORMANCE**

1.

## **EXHIBIT C INSURANCE REQUIREMENTS**

Charter School shall obtain at Charter School's expense the insurance specified in this Exhibit C prior to performing under this ~~Agreement Charter~~ and shall maintain it in full force and at its own expense throughout the duration of this ~~Charter Agreement~~, as required by any extended reporting period or tail coverage requirements, and all warranty periods that apply. Charter School shall obtain the following insurance from insurance companies or entities that are authorized to transact the business of insurance and issue coverage in the State of Oregon with an AM Best rating of no less than A: VII or Standard and Poor's rating of no less than BBB and that are acceptable to ODE, whose acceptance or rejection will be based on reasonable standards for insurance. All coverage shall be primary and non-contributory with any other insurance and self-insurance, with the exception of Professional Liability and Workers' Compensation. Charter School shall pay for all deductibles, self-insured retention and self-insurance, if any.

If Charter School maintains broader coverage and/or higher limits than the minimums shown in this Insurance Requirement Exhibit, ODE requires and shall be entitled to the broader coverage and/or higher limits maintained by Charter School.

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

All employers, including Charter School, that employ subject workers, as defined in ORS 656.027, shall comply with ORS 656.017 and provide workers' compensation insurance coverage for those workers, unless they meet the requirement for an exemption under ORS 656.126(2). Charter School shall require and ensure that each of its contractors complies with these requirements.

If Charter School is a subject employer, as defined in ORS 656.023, Charter School shall also obtain employers' liability insurance coverage with limits not less than \$500,000 each occurrence. If Charter School is an employer subject to any other state's workers' compensation law, Charter School shall provide workers' compensation insurance coverage for its employees as required by applicable workers' compensation laws including employers' liability insurance coverage with limits not less than \$500,000 and shall require and ensure that each of its out-of-state contractors complies with these requirements.

### **COMMERCIAL GENERAL LIABILITY:**

Charter School shall provide Commercial General Liability Insurance covering bodily injury and property damage in a form and with coverage that are satisfactory to the State of Oregon. This insurance must include personal and advertising injury liability, products and completed operations, contractual liability coverage for the indemnity provided under this Agreement, and have no limitation of coverage to designated premises, project or operation.

Coverage must be written on an occurrence basis in an amount of not less than \$1,000,000 per occurrence and not less than \$2,000,000 annual aggregate limit..

**AUTOMOBILE LIABILITY INSURANCE:**

Charter School shall provide Automobile Liability Insurance covering Charter School’s business use including coverage for all owned, non-owned, or hired vehicles with a combined single limit of not less than \$1,000,000 for bodily injury and property damage. This coverage may be written in combination with the Commercial General Liability Insurance (with separate limits for Commercial General Liability and Automobile Liability). Use of personal automobile liability insurance coverage may be acceptable if evidence that the policy includes a business use endorsement is provided.

**PROFESSIONAL LIABILITY:**

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

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

**NETWORK SECURITY AND PRIVACY LIABILITY:**

Charter School shall provide Network Security and Privacy Liability insurance for the duration of the Agreement and for the period of time in which Charter School (or its Business Associates or contractor(s)) maintains, possesses, stores, or has access to ODE or client data, whichever is longer, with a combined single limit of not less than \$1,000,000 per claim or incident. This insurance shall include coverage for third party claims and for losses, thefts, unauthorized disclosures, access or use of ODE or client data (which may include, but is not limited to, Personally Identifiable Information (“PII”), Payment Card Data and Protected Health Information (“PHI”) in any format, including coverage for accidental loss, theft, unauthorized disclosure access or use of ODE data.

**DIRECTORS, OFFICERS AND ORGANIZATION LIABILITY:**

Charter School shall provide Directors, Officers and Organization Insurance covering the Charter School’s Organization, Directors, Officers, and Trustees actual or alleged errors, omissions, negligent, or wrongful acts, including improper governance, employment practices and financial oversight - including improper oversight and/or use of use of funds and donor contributions - with a combined single limit of no less than \$1,000,000 per claim.

**PHYSICAL ABUSE AND MOLESTATION INSURANCE COVERAGE:**

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

**PROPERTY INSURANCE:**

Property Insurance shall be required on all Charter School owned buildings, leased property, personal property, and equipment. The insurance shall provide coverage against all risks of loss, including flood and earthquake, at full replacement cost and at least sufficient with respect to the face amount of the policy. Coverage shall include extra expense coverage for additional reasonable and necessary costs incurred by Charter School in excess of normal expenses to continue operations while the property, including the building, betterments and improvements, and contents are being replaced or repaired as a result from physical loss, damage or destruction by a covered cause of loss.

If Charter School leases premises, Charter School or the owner shall provide the same all-risk coverage. If Charter School leases personal property with public funds, Charter School shall provide the same all-risk coverage.

**EXCESS/UMBRELLA INSURANCE:**

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

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

**ADDITIONAL INSURED:**

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

Regarding Additional Insured status under the General Liability policy, the State of Oregon requires additional insured status with respect to liability arising out of ongoing operations and completed operations, but only with respect to Charter School's activities to be performed under this Agreement. The Additional Insured endorsement with respect to liability arising out of Charter School's ongoing operations must be on or at least as broad as ISO Form CG 20 10 and the Additional Insured endorsement with respect to completed operations must be on or at least as broad as ISO form CG 20 37.

**WAIVER OF SUBROGATION:**

Charter School shall waive rights of subrogation which Charter School or any insurer of Charter School may acquire against ODE or State of Oregon by virtue of the payment of any loss. Charter School will obtain any endorsement that may be necessary to affect this waiver of subrogation, but this provision applies regardless of whether or not ODE has received a waiver of subrogation endorsement from the Charter School or the Charter School's insurer(s).

**CONTINUOUS CLAIMS MADE COVERAGE:**

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

- i. Charter School 's completion and ODE's acceptance of all requirements under the Agreement, or
- ii. ODE's or Charter School's termination of this Agreement, or
- iii. The expiration of all warranty periods, if applicable, provided under this Agreement.

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

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

**NOTICE OF CHANGE OR CANCELLATION:**

The Charter School or its insurer must provide at least 30 calendar day's written notice to ODE before cancellation of, material change to, potential exhaustion of aggregate limits of, or non-renewal of the required insurance coverage(s).

**INSURANCE REQUIREMENT REVIEW:**

Charter School agrees to periodic review of insurance requirements by ODE under this Agreement and to provide updated requirements as mutually agreed upon by Charter School and ODE.

**STATE ACCEPTANCE:**

~~All insurance providers are subject to ODE acceptance, whose acceptance or rejection will be based on reasonable standards for insurance.~~ If requested by ODE, Charter School shall provide complete copies of insurance policies, endorsements, self-insurance documents and related insurance documents to ODE's representatives responsible for verification of the insurance coverages required under this Exhibit C.

# Oregon State Board of Education

June 15, 2023

AGENDA ITEM: 3.C.

<p><b>SUBJECT:</b> <a href="#">581-021-0077</a> <a href="#">Compulsory Attendance Notices and Citation</a></p> <p><b>STAFF NAME &amp; OFFICE:</b> Maggie Mashia, Office of Education Innovation and Improvement Marnie Jewell, Office of Education Innovation and Improvement</p> <p>Prior to 2021, families could be cited with a Class C Violation penalty for a student's unexcused attendance. The citation process is outlined in OAR 581-021-0077. Senate Bill 817 removed the Class C Violation penalty, and the attendance OAR needs to be updated to reflect the violation removal.</p> <p>New Rule <input checked="" type="checkbox"/> Amend Existing Rule <input type="checkbox"/> Repeal Rule</p>	<p><b>First Reading</b> Presentation 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

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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?  
Senate Bill 817, passed in 2021, removed the Class C Violation penalty from the attendance process for students and families. This legislation was passed without input or knowledge of ODE. This update removes the language that gives specificity for following the citation process, while also keeping the concept of families receiving information in their native language. This update removes language from OAR (581-021-0077) that refers to the citation process.
- b. What is the current requirement in rule or statute?  
Current rule provides the process for superintendents to issue a citation when a student's absences are severe. The process outlined in rule is no longer in alignment with SB 817, which removed the citation requirement for school superintendents.
- c. Why is this rule being brought forward right now?  
This rule is brought forward to ensure alignment of OAR with legislative action.

### 2. Purpose

- a. What function does the current rule hold?  
The rule is focused on outlining regular attendance and providing a penalty for parents who fail to ensure that their students are maintaining regular attendance. Process for issuing a citation is outlined (Class C Violation) for the school district and superintendent.

### 3. How long has the rule been in place?

The current rule was outlined in 1993, with the latest update being in 2015.

# Oregon State Board of Education

June 15, 2023

AGENDA ITEM: 3.C.

4. 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.

This change mirrors statute.

5. Stakeholder voice/input (individual and collective i.e., groups)
  - a. Who was involved in bringing this to the Board?

The Oregon Department of Education's Every Day Matters team, specifically Maggie Mashia (Director of Programs & Practices), Dany Douglas (Program Analyst), Saskia Dresler (Operations and Policy Analyst), Ange Matian, (Education Specialist), and Marnie Jewell (Education Specialist) were responsible for developing these rule changes and bringing them to the Board. Feedback from previous student and family engagement sessions were considered, as well as feedback from the Rules Advisory Committee.

The current proposed rule update seeks to align with statute. However, a more in-depth update is planned for the 2023-2024 school year to outline a clearer and more supportive process to engage students and families and address root causes of attendance barriers. This comprehensive rule update will go through engagement with students, families, school and community organization staff.

- b. What did engagement in this process entail?

Engagement with students and families included in-person meetings around the state just prior to COVID. These listening sessions focused on mental health absences and student/family experiences with unexcused absences responses from schools. Additional engagement opportunities have included OSBA collaboration (several meetings), and the Rules Advisory Committee (presentation and questions). Questions have also been posed to the department by a judge as well as school district and regional support personnel seeking clarity.

- c. Who may be affected by this?

Positive impact for families is anticipated by this rule change. Focal students are disproportionately experiencing chronic absenteeism at higher rates than white students and the state average rate, therefore would be experiencing citations at a higher rate. Removal of the citation process will ensure that families with the fewest material resources are not fiscally penalized.

What we have learned and heard from our communities is that the systemic barriers to student engagement are not remedied through financial penalties.

- d. Whose voice is missing?

We did not conduct current engagement with students, but have current work underway to engage with students around the topics of belonging, engagement, and attendance barriers. The team also welcomed feedback from the Student Advisors on the Rules Advisory Committee.

# Oregon State Board of Education

June 15, 2023

AGENDA ITEM: 3.C.

- e. What additional information does the Board need prior to moving forward?

No additional areas have been identified by the team; however Board input on any information needed is welcomed.

## SUMMARY OF PREVIOUS BOARD ACTION

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

This rule was presented at the May SBE. Discussion by the board prompted small changes to language.

## HAS THE RULE CHANGED SINCE LAST BOARD MEETING?

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No; same as last month

Yes – As follows:

Based upon SBE feedback and RAC input, there were 2 changes:

- 1. Written notice language was changed from “native” language to “home” language, and
- 2. 504 plan was included with IEP language based on SBE input.

Additionally, the team recognized the opportunity to provide more consistency between statute (ORS 339.010) and other rule language (OAR 581-021-0081), and changed the definition of “student” to ages 6-18.

## POLICY ISSUE OR CONCERNS

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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. Partners
  - a. How have you intentionally involved partners who are also members of communities affected by this rule?

We have intentionally connected with focal student groups around the state both pre-COVID and currently. We continue to seek collaboration opportunities with OSBA and COSA.

- b. Who are the historically underserved groups affected?

At the core of all of our work is focal student groups, and it is anticipated that the removal of the financial citation when students are experiencing barriers or a lack of engagement in school will have a positive impact on student belonging and engagement. It is anticipated that the families of focal student groups will be able to more fully engage in meaningful collaboration with schools and districts to identify the barriers to student engagement and attendance, as well as co-create the solutions that support students’ engagement in school.

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AGENDA ITEM: 3.C.

- c. Has there been consultation or collaboration with tribes in this rule change or policy decision?

There has been ongoing consultation with the Office of Indian Education, related to supports needed by families and those supporting attendance and removing barriers for students and families.

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

The rule change seeks to keep the portion of the rule that addresses language needs of communities, by intentionally retaining language associated with communication to families.

## 2. Negative/Positive Effects

- a. What is the impact on the population most affected by this rule that the board should consider?

Focal students are disproportionately navigating chronic absenteeism, and thus families of focal students were more likely to disproportionately receive citations. The citation process involved families with the court system. Removing the citation process has the potential to mitigate harm and distrust between families and schools, as the court process can be isolating, stigmatizing and punitive.

- b. What possible opportunities, assets or access could this rule provide?

This initial rule update aligns rule with statute to eliminate the citation and court process for families of students experiencing chronic absenteeism. In its place, districts can co-develop reengagement strategies with families and community education partners to address immediate barriers to student engagement and attendance, as well as address root causes of chronic absenteeism, such as (but not limited to) school climate and culture and culturally sustaining pedagogy.

To develop a statewide, guiding process for addressing student absenteeism, the ODE team will facilitate and support engagement sessions in the next school year. This statewide process will be proposed in rule, and districts can build upon its foundation to individualize it to their community's contexts.

- c. What is the impact on eliminating the opportunity or achievement gap?

Student engagement, belonging and attendance all impact students' experiences and outcomes of learning. The rule update supports eliminating the opportunity and achievement gap.

- d. Have all the potential unintended consequences been considered?

Yes.

- e. Does this rule advance the ESSA goals?

Yes. The proposed updates and new rule to the EDM rule set are in direct alignment with ESSA's goals.

# Oregon State Board of Education

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AGENDA ITEM: 3.C.

3. What are the barriers to more equitable outcomes, either:
  - a. State or federally mandated?  
None identified
  - b. Political?  
A perception has been raised that, by not providing a financial penalty, there are no longer any “teeth” to the compulsory attendance laws.
  - c. Emotional?  
It is anticipated that families experiencing poverty in addition to attendance barriers will feel less ostracized and burdened by a system that has historically impacted our families experiencing poverty.
  - d. Financial?  
Families will not have the additional financial burden of penalties related to student attendance, which further compounds family stressors and feelings of belonging to the school community
  - e. Programmatic?  
School districts that previously used the citation process as a component of building student engagement and belonging related to improving attendance have been needing to design new processes.
  - f. Language?  
None identified
  - g. Geography?  
None identified
  - h. Size?  
none identified

## **EQUITY IMPACT ANALYSIS**

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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.

● A: there are no adverse unintended consequences currently identified as a result in this change in rule.

● B: In Oregon, students who experience the highest rates of absenteeism are American Indian/Alaska Native students (51.5%), Native Hawaiian/Pacific Islander students (54.6%), Black/African American

# Oregon State Board of Education

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AGENDA ITEM: 3.C.

students (44.4%), Hispanic/Latino students (44.2%), students with disabilities (43.8%), and students experiencing houselessness (60.8%). This means that the families of students, many of whom are economically disadvantaged, have been disproportionately affected by this law.

C. 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. As outlined above, this rule is expected to provide an atmosphere of collaboration with communities historically marginalized by the education system, rather than a punitive approach when students and families experience barriers to attendance.

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

The rule change came about through the legislative process unbeknownst to ODE personnel. It is believed that the intention behind this rule change was designed to create a more collaborative, welcoming and inclusive environment for students historically marginalized by the system when families and students experience life circumstances which make school attendance difficult.

## FISCAL ANALYSIS

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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?

There is no anticipated fiscal impact to most of the Agency. ODE's Every Day Matters team may be called upon with the greater resource of time regarding consultation, research and publication of best practices, providing support both in-person or by correspondence to districts, regions and families, as we already do.

2. How does the proposed rule change impact school districts and ESDs?

Prior to the citation removal, some districts used the citation process, others did not. Districts and ESDs that used the citation as a "last resort" to address students' chronic absenteeism will need to identify other processes for student and family engagement. There are systems in place at the ESDs to support districts in their regions as they develop these new processes. Additionally, ODE's Every Day Matters team continues to provide support to regions and districts in the area of attendance practices.

3. How does the proposed rule change impact schools and other educational institutions?

We anticipate schools and other educational institutions to be impacted to varying levels. School districts that relied heavily on the citation process will need to find new ways to re-engage families and their students into the learning environment. For those districts who have not relied on the citation process as a tool for addressing irregular attendance, there will not be a perceived impact.

# Oregon State Board of Education

June 15, 2023

AGENDA ITEM: 3.C.

4. Does the proposed rule change impact other stakeholders?  
Judicial systems may experience an impact to their internal systems, as well as the communities they serve related to time spent developing new practices and supports for students and families.

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

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

The Board's approval will allow ODE to be in alignment with the statute. A vote of "no" would necessitate more planning as well as a second return to the board to align OAR with the current Statute.

## STAFF RECOMMENDATION

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

## ATTACHMENTS

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Attachment 1:

[Updated OAR](#)

[DRAFT Guidance for districts and regions](#)

[581-021-0077](#)

[Compulsory Attendance Notices and Citation](#)

**581-021-0077**

**Compulsory Attendance Notices ~~and Citation~~**

(1) Definitions for purposes of this rule:

(a) "Parent" means parent, guardian or other person having control of a minor child who has not completed the 12th grade or is not otherwise legally exempt from compulsory attendance under ORS 339.030.

(b) "Student" means a minor between the ages of 7 6 and 18 who has not completed the 12th grade, and who is not exempt from compulsory attendance under ORS 339.030.

(c) "Superintendent" means the superintendent of a public school district or the superintendent's designee.

(d) "Attendance supervisor" means an official appointed under ORS 339.040.

(e) "Regular attendance" means attendance which does not include more than eight unexcused one-half day absences, or the equivalent thereof, in any four-week period in which the school is in session.

(2) Notice of Attendance Supervisor. When an attendance supervisor determines a parent has failed to enroll his or her child and to maintain such child in regular attendance at a public school, the attendance supervisor shall give written notification to the parent within 24 hours of being informed of the failure. The notice may be served personally or by certified mail.

(a) The notice shall state that the student must appear at the public school on the next school day following receipt of the notice and maintain regular attendance for the remainder of the school year.

(b) The notice shall state that the parent has the right to request, for a child who does not have an Individualized Education Program [or 504 plan](#), an evaluation to determine if the child should have an Individualized Education Program [or 504 plan](#); or for a child who has an Individualized

**Commented [1]:** Compulsory attendance is for ages 6-18; adjusted to reflect other OARs: 581-021-0081 (b) "Student" means a minor between the ages of 6 and 18 who has not completed the 12th grade, and who is not exempt from compulsory attendance under ORS 339.030. <https://secure.sos.state.or.us/oard/viewSingleRule.action?ruleVrsnRsn=274654>

ORS 339.010 School attendance required. [https://www.oregonlegislature.gov/bills\\_laws/ors/ors339.html](https://www.oregonlegislature.gov/bills_laws/ors/ors339.html)

Education Program or 504 plan, a review of the Individualized Education Program or 504 plan to ensure that the accommodations remain appropriate to the student's needs.

(c) The notice shall be written in the home native language of the parent or guardian of the student.

(d) The attendance officer, at the time the notice is served to the parent, shall notify the district superintendent, principal or other appropriate school official.

(3) Notice of Superintendent. If the parent receiving the notice of the attendance supervisor does not comply with that notice, the attendance officer, within three days of knowledge of such noncompliance, shall notify the superintendent. Upon notification by the attendance officer, the superintendent may issue a citation as set forth in Attachment A of this rule.

(4) Prior to issuing the citation set forth in Attachment A, the superintendent, by personal service or certified mail, shall serve the parent written notification that:

(a) States that the student is required to regularly attend a full-time school;

(b) Explains that the failure to send the student and to maintain the student in regular attendance is a Class C violation;

(c) States that the superintendent may issue a citation;

(d) Requires the parent and the student to attend a conference with a designated school official; and

(e) States that the parent has the right to request for a child who does not have an Individualized Education Program, an evaluation to determine if the child should have an Individualized Education Program; or for a child who has an Individualized Education Program, a review of the Individualized Education Program.

(f) Is written in the native language of the parent or guardian of the student.

(5) The superintendent shall schedule the conference described in section (4)(d) of this rule. A conference may not be scheduled until after any evaluations or reviews described in subsections 2(b) and 4(e) of this rule have been completed. If the parent does not attend the conference or fails to send the child to public school after the conference, the superintendent

may issue a citation provided by the Department of Education in the form set forth as Attachment A which is incorporated by reference into this rule. **The citation shall be served in person.**

[ED. NOTE: Attachments referenced are available from the agency.]

# Oregon State Board of Education

June 15, 2023

AGENDA ITEM: 3.D.

<p><b>SUBJECT:</b> 581-xxx-xxxx: Federal ESEA Program Appeals Process (Temp Rule) <b>STAFF NAME &amp; OFFICE:</b> Liz Ross, Director Federal Systems, Office of Teaching, Learning, and Assessment</p> <p>The Oregon Department of Education (the Department) Federal Systems Team administers formula and competitive federal programs under the Every Student Succeeds Act, the Bipartisan Safer Communities Act, and the American Rescue Plan-Homeless Children and Youth programs. Federal law requires that ODE provide grant recipients who are aggrieved by the Department’s final action under its administration of these programs 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"/> <b>First Reading</b> <input type="checkbox"/> Presentation <input type="checkbox"/> No Presentation</p> <p><input checked="" type="checkbox"/> <b>Action</b> <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 formula and competitive federal programs under the Elementary and Secondary Education Act, including:

- Title I, Part A (Improving the Academic Achievement of the Disadvantaged)
- Title I, Part D (Prevention and Intervention Programs for Neglected, Delinquent or At Risk Youth), Subpart 2,
- Title II, Part A (Improving Teacher Quality),
- Title IV, Part A (Student Success and Academic Achievement),
- Title IV, Part B (Nita M. Lowey’s 21st Century Community Learning Centers and After School Safety and Enrichment for Teens Programs)
- Title V, Part B (Rural Low Income Schools),
- McKinney-Vento Homeless Education and,
- Foster Care Student Educational Stability.

In addition to the grants administered under ESEA, Oregon administers the Stronger Connections Grant authorized under the Bipartisan Safer Communities Act, and the American

# Oregon State Board of Education

June 15, 2023

AGENDA ITEM: 3.D.

Rescue Plan-Homeless Children and Youth programs. As a result, the programs listed above are 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 federal grants 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

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1. Has this been before the board before? No.

## HAS THE RULE CHANGED SINCE LAST BOARD MEETING?

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

## POLICY ISSUE OR CONCERNS

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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

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Any final action taken by the Department against an LEA as part of its administration of the Federal Education Program will have a direct impact on the students and families served by that LEA. The Department strives always to ensure its actions advance equity and opportunity for historically underserved populations. The hearing process established by this temp rule affords LEAs administering a local or regional program funded through these programs 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

# Oregon State Board of Education

June 15, 2023

AGENDA ITEM: 3.D.

administration of Oregon’s Federal Education Program under ESEA, Bipartisan Safer Communities Act, and the ARP-HCY programs.

## FISCAL ANALYSIS

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What is the fiscal impact of the proposed rule changes to the Department of Education, school districts, education service districts or schools? Should an LEA exercise its right to request a hearing under the process established by this temp rule, these costs would be borne by the specific Title Program that is aggrieved within the Federal Systems Team in the Office of Teaching, Learning, and Assessment. Costs would be covered using general funds.

LEAs choosing to exercise their right to request a hearing under this temp rule would be responsible for bearing the associated costs.

## EFFECT OF A “YES” OR “NO” VOTE

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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 Federal 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

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Approve  Approve next month  No recommendation at this time  
**Prompted by:**  State law changes  Federal law changes  other (*out of compliance with existing federal law*)

## ATTACHMENTS

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Draft rules

# Oregon State Board of Education

June 15, 2023

AGENDA ITEM: 3.D.

OAR XXX-XXX-XXXX

- (1) The appeal procedures required by this rule apply to appeals of Department of Education decisions affecting local education agencies participating in the following federal programs:
- a. Title I, Part A of the Elementary and Secondary Education Act
  - b. Title I, Part D, Subpart 2, of the Elementary and Secondary Education Act
  - c. Title II, Part A of the Elementary and Secondary Education Act
  - d. Title IV, Part A of the Elementary and Secondary Education Act
  - e. Title IV, Part B of the Elementary and Secondary Education Act
  - f. Title V, Part B of the Elementary and Secondary Education Act
  - g. McKinney-Vento Homeless Education,
  - h. Stronger Connections Grant authorized under the Bipartisan Safer Communities Act
  - i. American Rescue Plan-Homeless Children Youth Programs I and II

- (2) A local education agency subject to these rules may appeal the following:

- (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.

(3) 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.

(4) The Department shall notify the local education agency (Appellant) in writing of the grounds upon which the Department based its action identified in subsection (1) of this rule. The notice must also 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 or 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.

(5) A request for appeal of an action identified in subsection (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 for appeal must allege in pleadings, affidavits, and supporting documents that the Department violated State or Federal law, rules, regulations, or guidelines governing the federal title

# Oregon State Board of Education

June 15, 2023

AGENDA ITEM: 3.D.

program. The Department shall deny any request for appeal that fails to allege that the Department violated State or Federal law, rules, regulations, or guidelines governing the federal Education Program.

(6) For appeals under sections 2(a) and 2(b) of this rule, a hearing on the record will be conducted by an impartial panel designated by the Oregon Department of Education. The impartial panel will conduct the hearing entirely on the basis of documentation submitted unless:

- (a) The impartial panel determines, after reviewing all appropriate submissions, that an evidentiary hearing is needed to resolve a material factual issue in dispute.
- (b) The impartial panel determines, after reviewing all appropriate submissions, that oral argument is needed to clarify the issues in the case.
- (c) At the party's request—if after consultation with the parties—the impartial panel determines that an evidentiary hearing or an oral argument is needed.
- (d) The procedures described in section (3) of this rule do not apply to the review conducted by the impartial panel under this section.

(7) For appeals under sections 2(c), 2(d), 2(e), and 2(f) of this rule, 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 of receipt by the Department of 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.

(a) The Appellant bears the burden of proof to show that the Department's action identified in subsection (1) of this rule constitutes a violation of State or Federal law, rules, regulations, or guidelines governing the Federal Education Program.

(b) 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.

(c) As soon as practicable after the hearing, but in no case later than five calendar days after the hearing, the Administrative Law Judge shall prepare a proposed order and serve the proposed order on the Department and the Appellant.

(d) No later than ten calendar days after the hearing, the Department shall either adopt the proposed order or prepare a new final order.

20 USC 1231b-2  
34 CFR 76.401

# Oregon State Board of Education

June 15, 2023

AGENDA ITEM: Oregon Trail & Sisters School Districts Supplemental Plans

<p><b>SUBJECT:</b> Oregon Trail &amp; Sisters School Districts Supplemental Plans <b>STAFF NAME &amp; OFFICE:</b> Brock Dittus, Pupil Transportation &amp; Fingerprinting</p> <p>Two School Districts have submitted a new supplemental plan for board approval. This will change the areas in which transportation will be provided / required for students who live within the statutory minimum for transportation.</p>	<p><input type="checkbox"/> Informational Presentation</p> <p><input checked="" type="checkbox"/> Written Report</p>
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## BACKGROUND

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In 1991 the Oregon Legislature added a mandate, and funding, to provide transportation to school students who live a certain distance from their elementary or secondary school, where previously districts elected to provide transportation as they saw fit. The distances established coincide to the previous limit at which students were required to attend school prior to Oregon’s Compulsory School Law.

The legislature also recognized that students who live closer than these prescribed limits may also require transportation due to health or safety reasons, so ORS 327.043 allows for a “supplemental plan” that must be approved by the State Board of Education.

Other than the legislative guidance that the transportation must be for “health or safety” reasons, the State Board has traditionally allowed local school districts to determine areas within their district that require transportation within the distance limits.

In 1992, many districts submitted supplemental plans for approval from the State Board, and all were adopted. Having an approved supplemental plan does two things:

1. It allows a school district to be reimbursed as part of the transportation grant of the state school fund; and
2. It requires transportation to be provided by the district. In other words, the district can’t stop providing this transportation without the approval of a new plan.

The State Board does have the discretion to approve or not approve supplemental plans. The Pupil Transportation Unit does ensure that plans presented to the board present a health or safety reason for the plan.

A supplemental plan must be approved by the local school board prior to presentation to the State Board for approval. The Grants Pass School District Board approved this supplemental plan at their meeting on October 11, 2022 and submitted the plan to ODE for approval thereafter.

The supplemental plan submitted by Oregon Trail School District accounts for updated conditions within the no-transport area, and at this time will affect approximately 168 students. Proponents and opponents of the submitted plan had the opportunity to be heard at the local level. This amendment replaces the previously approved version of the plan.

# Oregon State Board of Education

**June 15, 2023**

AGENDA ITEM: Oregon Trail & Sisters School Districts Supplemental Plans

The supplemental plan submitted by Sisters School District accounts for updated conditions within the no-transport area, and at this time will affect approximately 10-15 new students. Proponents and opponents of the submitted plan had the opportunity to be heard at the local level. This amendment updates the previously approved version of the plan.

## **SUMMARY OF PREVIOUS BOARD ACTION**

---

The State Board approved Oregon Trail School District's original supplemental plan in 1992, with no revisions on record since that time.

The State Board approved Sisters School District's original supplemental plan in 1992, with revisions in 2000 and 2015.

## **POLICY ISSUE OR CONCERNS**

---

Both school districts submitted their supplemental plans for State Board approval after the local school boards adopted them during a session open to the public. ODE does not engage with stakeholders regarding these plan revisions separate from the district's public process.

In both cases, districts are accounting for students who would otherwise be required to walk in dangerous conditions due to speed and/or volume of vehicle traffic, width and condition of street, lack of shoulders or sidewalks suitable to walking, poor visibility, and dangerous crossings or intersections.

## **EQUITY IMPACT ANALYSIS**

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ODE does not conduct a separate analysis of a supplemental plan adopted by a local school board except to verify that the supplemental plan is being submitted for health or safety reasons as required by statute.

## **FISCAL ANALYSIS**

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There is no fiscal analysis because supplemental plans do not usually have a significant impact on agency funds. There is no requirement for ODE to act as a result of this action. There may be a very small change in impact to the State School Fund Transportation Grant as a result of providing this transportation; however, in most cases the buses / routes that will be transporting these students will pick them up on their way in from other mandated transportation areas around the district.

Adoption of these plans will not have an effect on any other school districts, and will allow the concerned school districts to be reimbursed at their current rate for the transportation of these students as part of their transportation grant.

## **ATTACHMENTS**

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Attachment 1: Oregon Trail Revised Supplemental Plan

Attachment 2: Sisters SD Revised Supplemental Plan

**OREGON TRAIL SCHOOL DISTRICT 46  
SUPPLEMENTAL PLAN FOR HOME TO SCHOOL TRANSPORTATION**

WHEREAS, ORS 581-023-0040 does not allow state school fund (SSF) reimbursement of home to school transportation costs within 1 mile of grade k-8 schools, and 1.5 miles of grade 9-12 schools (i.e. limitation areas);

WHEREAS, ORS 581-023-0040 (g) allows school boards to approve a supplemental transportation plan to identify routes within these limitation areas that may be eligible for SSF reimbursement do to specific conditions;


WHEREAS, the follow specific hazardous conditions exit on roads identified within the limitation areas:

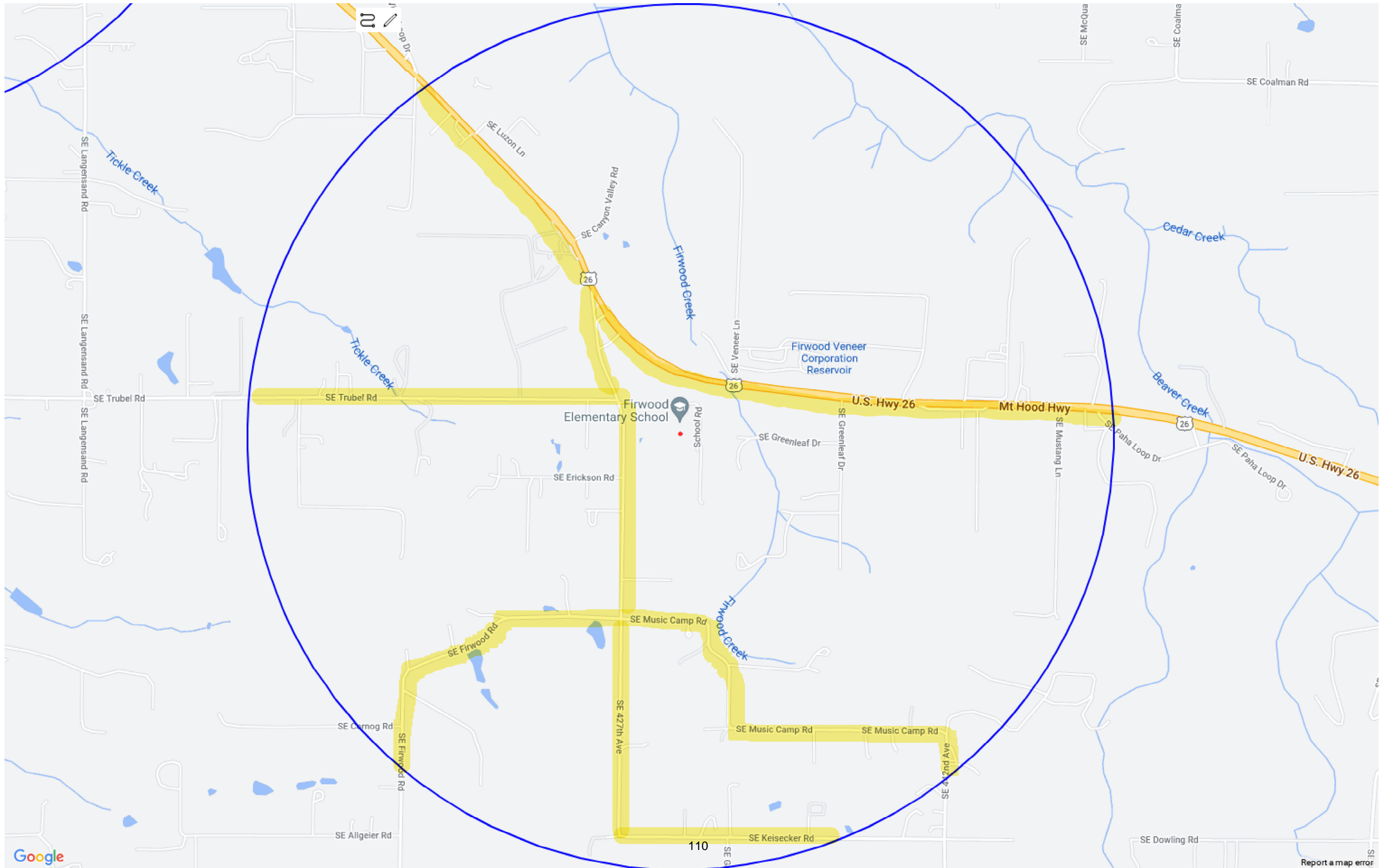
- Roads do not have sufficient shoulder for safe (away from traffic) student pedestrian access to school.
- Roads with minimally sufficient pedestrian shoulders have high rural traffic speed limits.
- Roads do not have sufficient, or any, marked pedestrian crossings.
- Pedestrian routes require K-8 students to cross high traffic state hi-ways.
- Student with specialized needs under Individual Education Plans (IEPs) or Section 504 plans live with the limitation areas.
- A significant number of students are affected within the limitation areas; approximately 168- grades K-8, and 67 - grades 9-12.

BE IT THEREFORE RESOLVED that the Board of Directors for Oregon Trail School District 46 does hereby approve a supplemental plan allowing transportation on the streets per exhibits (1 through 8) attached, for the reasons as stated.

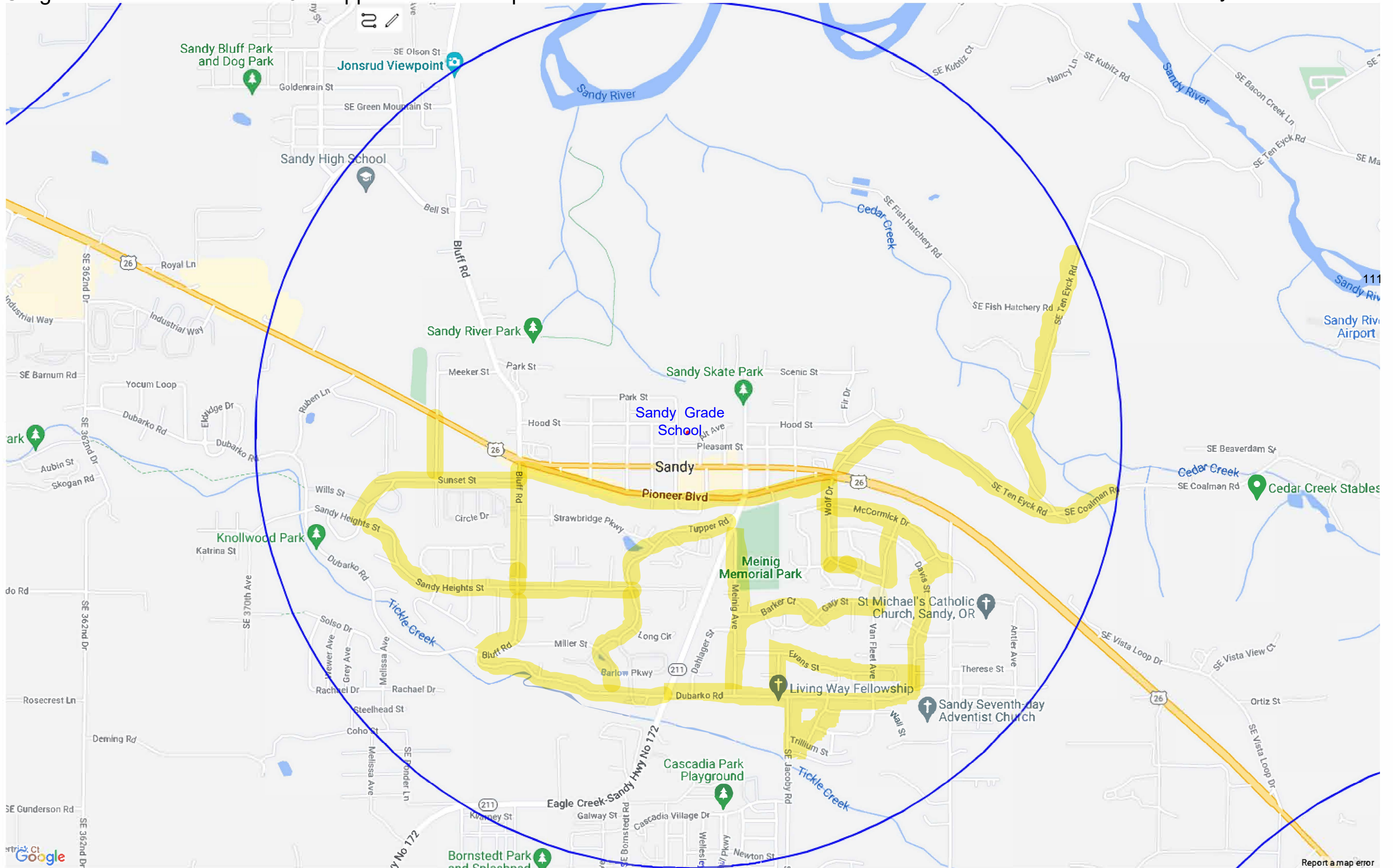
Approved by the Oregon Trail School District 46 Board of Directors this 12<sup>th</sup> day of June 2023.

  
\_\_\_\_\_  
Randy Carmony, Board Chair

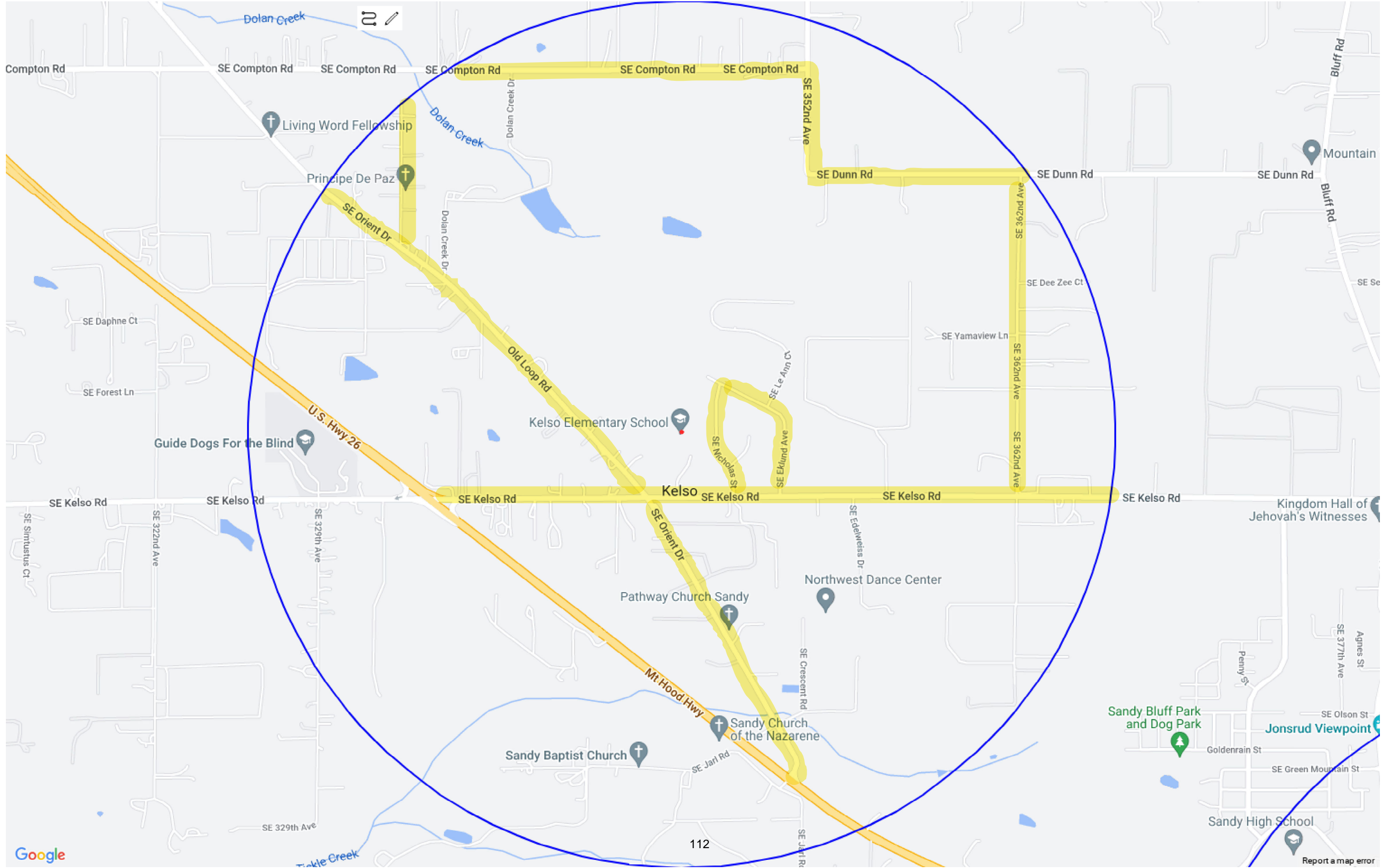
  
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Aaron Bayer, Superintendent/Clerk



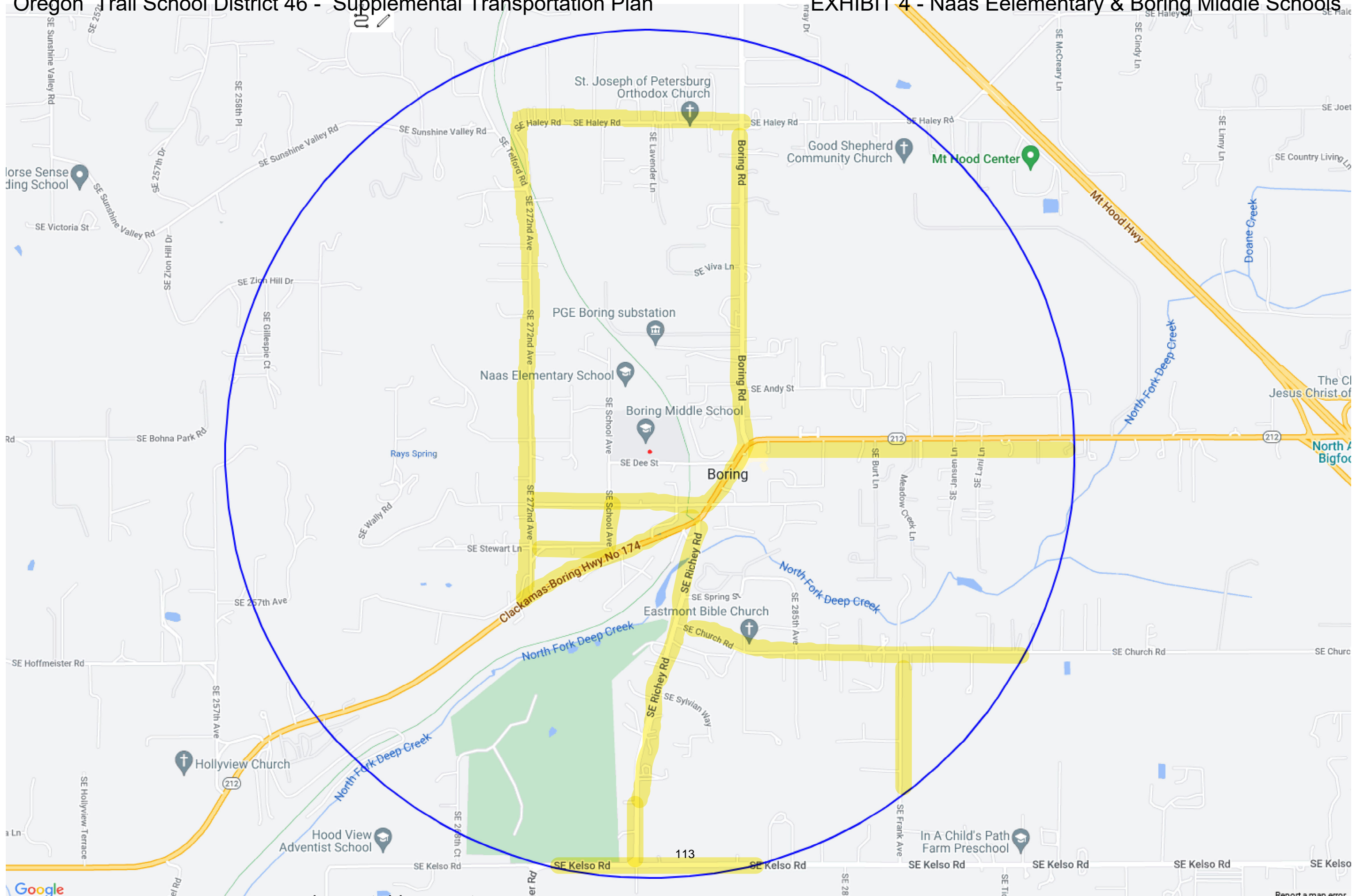
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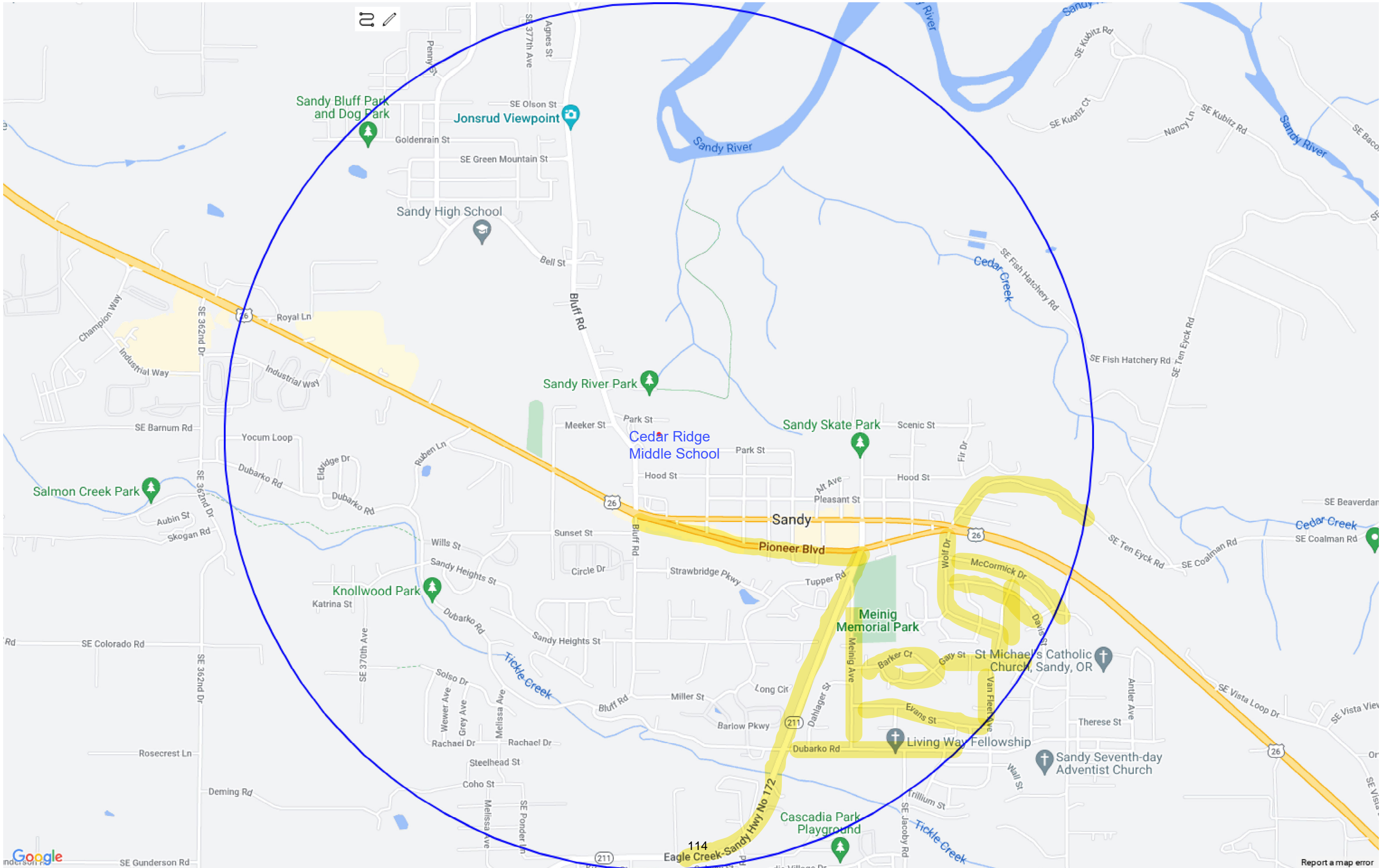
 = supplemental bus routes



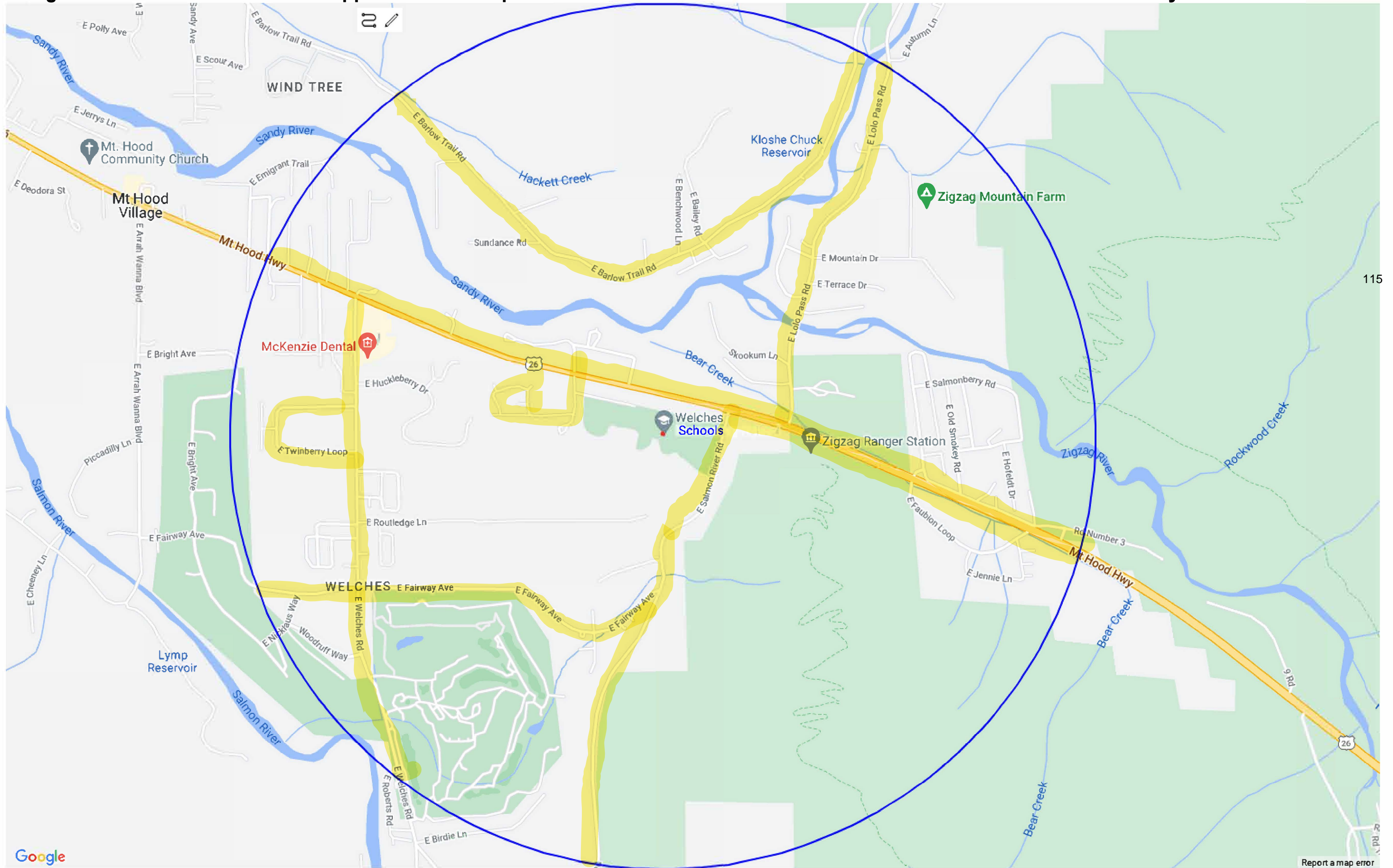
 = supplemental bus routes



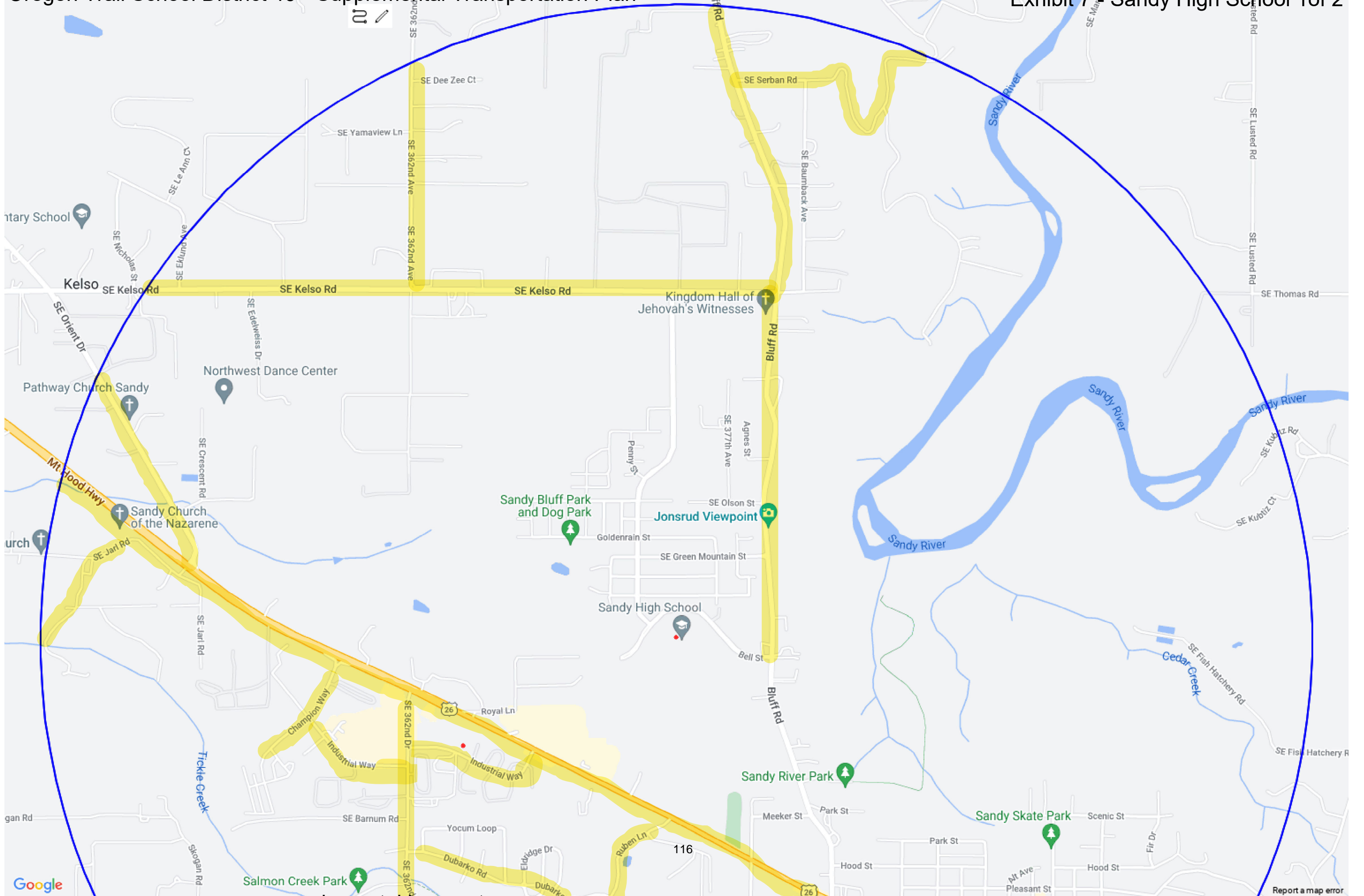
 = supplemental bus routes



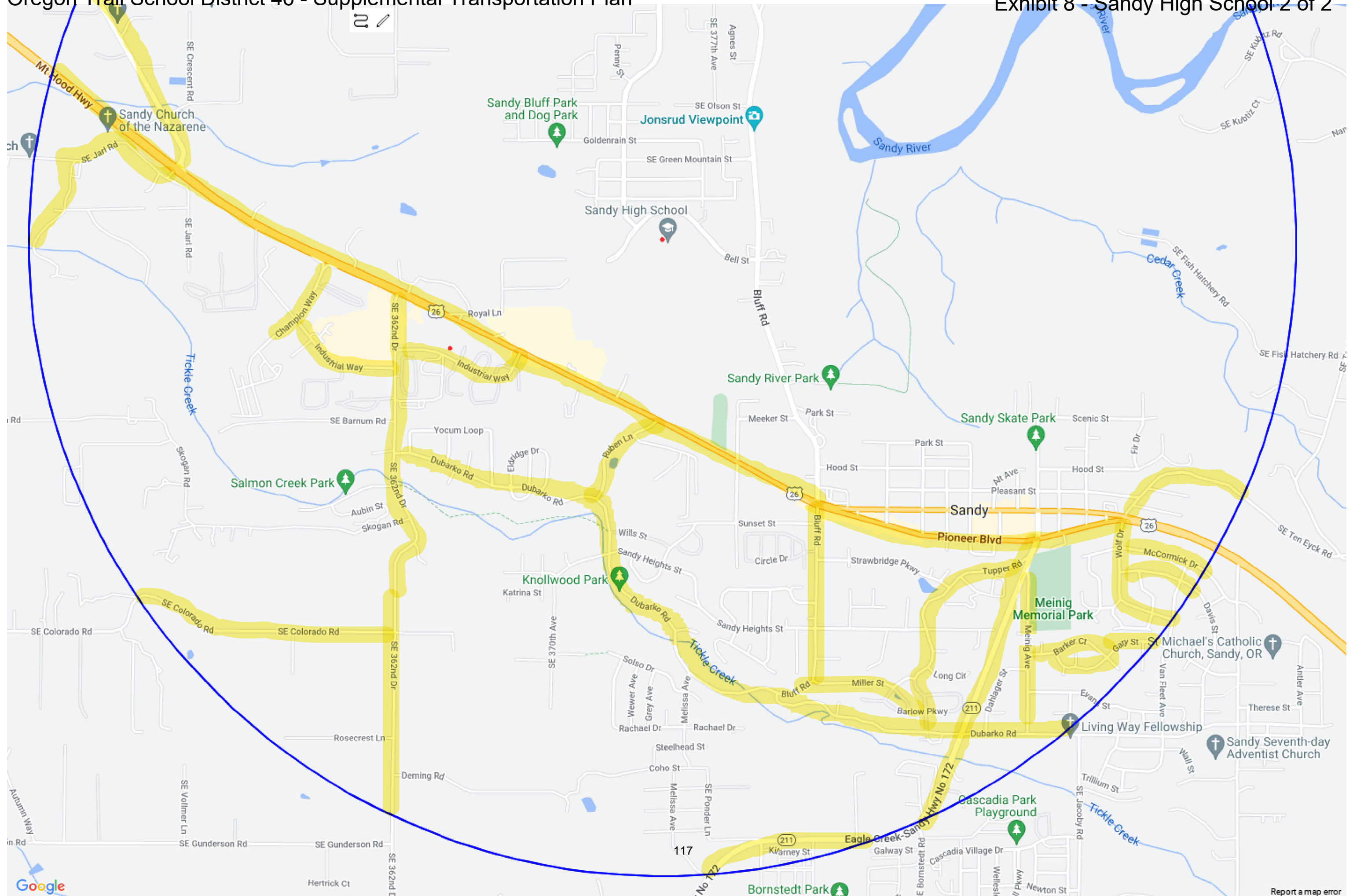
 = supplemental bus routes



 = supplemental bus routes



 = supplemental bus routes



 = supplemental bus route

# Oregon State Board of Education

June 15, 2023

AGENDA ITEM: Oregon Trail & Sisters School Districts Supplemental Plans

<p><b>SUBJECT:</b> Oregon Trail &amp; Sisters School Districts Supplemental Plans <b>STAFF NAME &amp; OFFICE:</b> Brock Dittus, Pupil Transportation &amp; Fingerprinting</p> <p>Two School Districts have submitted a new supplemental plan for board approval. This will change the areas in which transportation will be provided / required for students who live within the statutory minimum for transportation.</p>	<p><input type="checkbox"/> Informational Presentation</p> <p><input checked="" type="checkbox"/> Written Report</p>
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## BACKGROUND

---

In 1991 the Oregon Legislature added a mandate, and funding, to provide transportation to school students who live a certain distance from their elementary or secondary school, where previously districts elected to provide transportation as they saw fit. The distances established coincide to the previous limit at which students were required to attend school prior to Oregon’s Compulsory School Law.

The legislature also recognized that students who live closer than these prescribed limits may also require transportation due to health or safety reasons, so ORS 327.043 allows for a “supplemental plan” that must be approved by the State Board of Education.

Other than the legislative guidance that the transportation must be for “health or safety” reasons, the State Board has traditionally allowed local school districts to determine areas within their district that require transportation within the distance limits.

In 1992, many districts submitted supplemental plans for approval from the State Board, and all were adopted. Having an approved supplemental plan does two things:

1. It allows a school district to be reimbursed as part of the transportation grant of the state school fund; and
2. It requires transportation to be provided by the district. In other words, the district can’t stop providing this transportation without the approval of a new plan.

The State Board does have the discretion to approve or not approve supplemental plans. The Pupil Transportation Unit does ensure that plans presented to the board present a health or safety reason for the plan.

A supplemental plan must be approved by the local school board prior to presentation to the State Board for approval. The Grants Pass School District Board approved this supplemental plan at their meeting on October 11, 2022 and submitted the plan to ODE for approval thereafter.

The supplemental plan submitted by Oregon Trail School District accounts for updated conditions within the no-transport area, and at this time will affect approximately 168 students. Proponents and opponents of the submitted plan had the opportunity to be heard at the local level. This amendment replaces the previously approved version of the plan.

# Oregon State Board of Education

**June 15, 2023**

AGENDA ITEM: Oregon Trail & Sisters School Districts Supplemental Plans

The supplemental plan submitted by Sisters School District accounts for updated conditions within the no-transport area, and at this time will affect approximately 10-15 new students. Proponents and opponents of the submitted plan had the opportunity to be heard at the local level. This amendment updates the previously approved version of the plan.

## **SUMMARY OF PREVIOUS BOARD ACTION**

---

The State Board approved Oregon Trail School District's original supplemental plan in 1992, with no revisions on record since that time.

The State Board approved Sisters School District's original supplemental plan in 1992, with revisions in 2000 and 2015.

## **POLICY ISSUE OR CONCERNS**

---

Both school districts submitted their supplemental plans for State Board approval after the local school boards adopted them during a session open to the public. ODE does not engage with stakeholders regarding these plan revisions separate from the district's public process.

In both cases, districts are accounting for students who would otherwise be required to walk in dangerous conditions due to speed and/or volume of vehicle traffic, width and condition of street, lack of shoulders or sidewalks suitable to walking, poor visibility, and dangerous crossings or intersections.

## **EQUITY IMPACT ANALYSIS**

---

ODE does not conduct a separate analysis of a supplemental plan adopted by a local school board except to verify that the supplemental plan is being submitted for health or safety reasons as required by statute.

## **FISCAL ANALYSIS**

---

There is no fiscal analysis because supplemental plans do not usually have a significant impact on agency funds. There is no requirement for ODE to act as a result of this action. There may be a very small change in impact to the State School Fund Transportation Grant as a result of providing this transportation; however, in most cases the buses / routes that will be transporting these students will pick them up on their way in from other mandated transportation areas around the district.

Adoption of these plans will not have an effect on any other school districts, and will allow the concerned school districts to be reimbursed at their current rate for the transportation of these students as part of their transportation grant.

## **ATTACHMENTS**

---

Attachment 1: Oregon Trail Revised Supplemental Plan

Attachment 2: Sisters SD Revised Supplemental Plan

The area within the yellow outline represents the area affected by the request. The green area represents 1 radius mile, from Sisters Elementary School. Elementary students living within that area cross South Locust Street when walking to and from school. South Locust street does not have a safe controlled crossing.

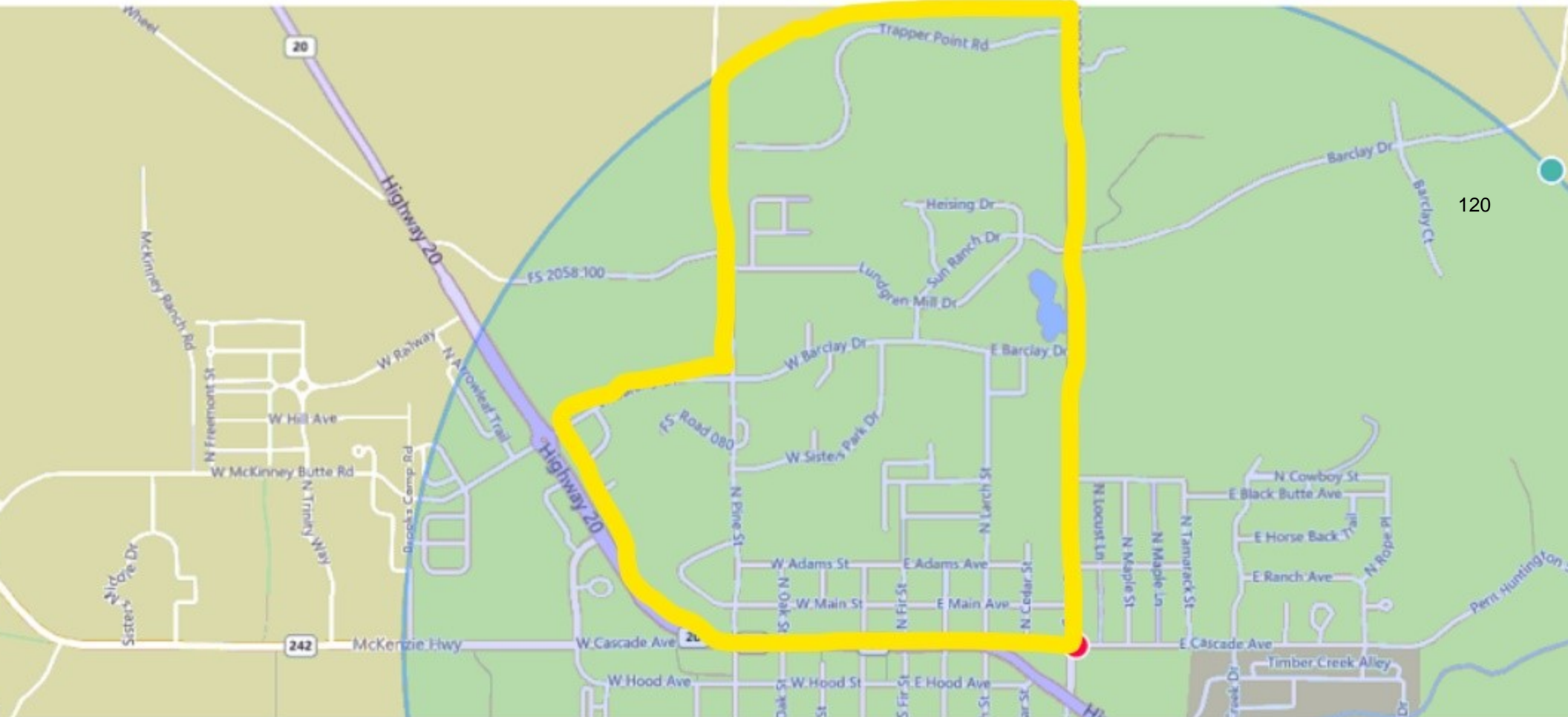
LATOR

School Sisters oregon

Search

Radius: 1609 m | 1.61 km | 1.00 mi | 5279 ft  
Circle Area: 8133210 m<sup>2</sup> | 8.13 km<sup>2</sup> | 3.14 mi<sup>2</sup> | 87545144 ft<sup>2</sup>

Draw a Circle 1 mi





# Sisters School District

“Home of the Outlaws”

---

Ryan Stock  
Director of Operations

August 11, 2022

Brock Dittus  
Program Analyst  
Pupil Transportation and Fingerprinting  
Office of Finance and Administration  
255 Capitol St. NE  
Salem, OR 97310

Re: Request to change the 2015 Supplemental Transportation Plan

Dear Mr. Dittus:

The Sisters School District #6 currently has a Supplemental Transportation Plan that is outdated and does not include students who reside on the West side of South Locust ST and live within one mile of the elementary school.

WE are requesting a Supplemental Transportation Plan change to include students who live within one mile of the elementary school who have to cross South Locust St. Currently there is no controlled crosswalk to allow children to cross South Locust St safely. Since the 2015 Supplemental Transportation Plan vehicle traffic has increased dramatically and presents an increased safety concern for students walking to and from school. This plan would include approximately 10 to 15 elementary school students.

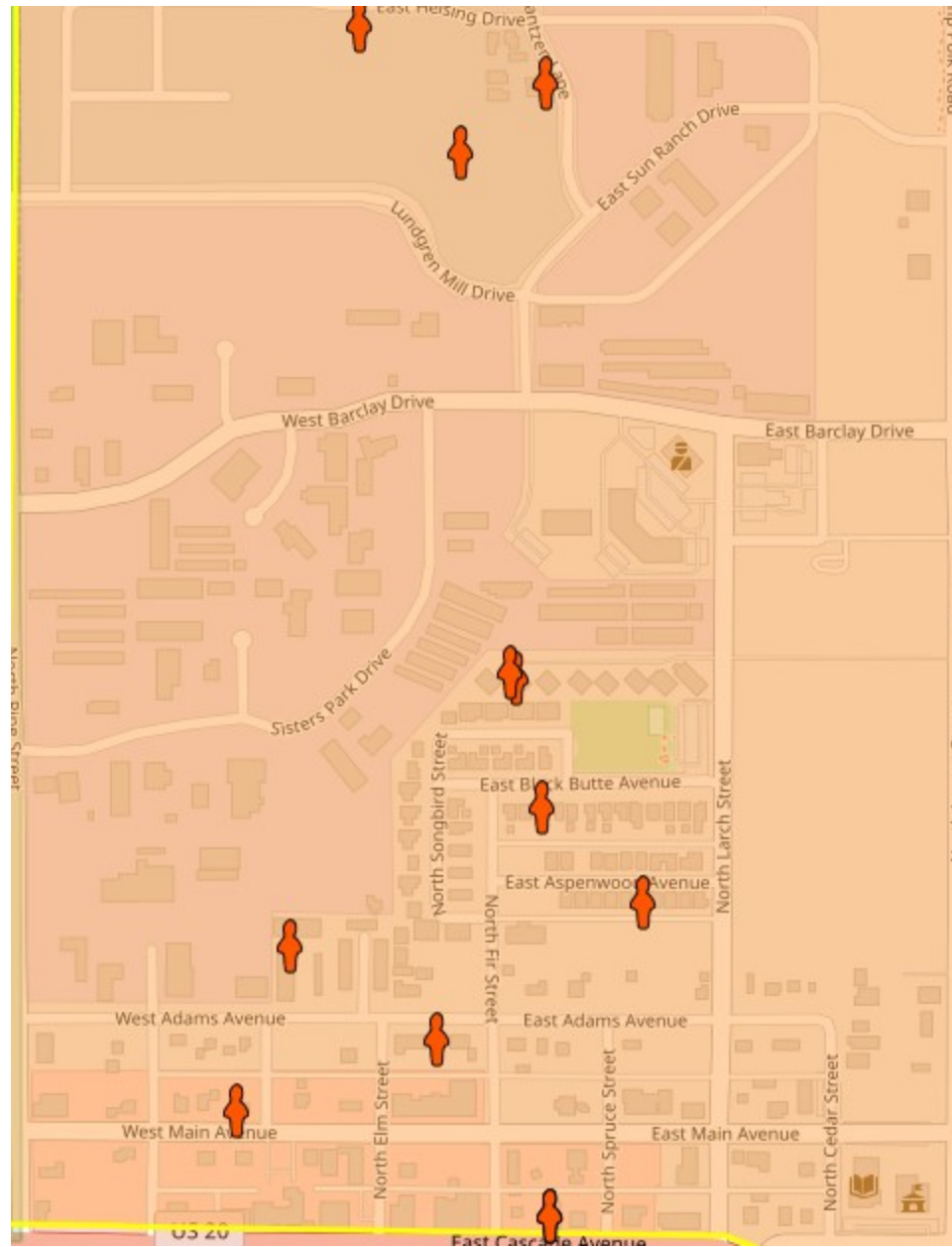
We ask that you would consider the safety of the children and grant the Sisters School District Supplemental Transportation Plan change as requested to help these children get to and from school safely.

Sincerely,

*Ryan Stock*

Ryan Stock  
Director of Operations

The individuals on this map represent elementary students that have an unsafe crossing at South Locust street walking to and from school.





# Sisters School District

“Home of the Outlaws”

Board of Directors Meeting  
Sisters District Office  
September 7, 2022  
6:00 p.m.

6:00pm

## MEETING MINUTES

### ATTENDEES:

**Board:** Asa Sarver, Jeff Smith (Zoom), David Thorsett, Edie Jones, Jenica Cogdill

**Superintendent:** Curt Scholl

**Supervisors:** Sherry Joseph

### CALL TO ORDER / FLAG SALUTE

David Thorsett called the meeting to order at 6:00 p.m. and led the flag salute.

### ADDITIONS, DELETION, AMENDMENTS TO THE AGENDA/ ADOPTION OF AGENDA

Amendments

Board Transportation Letter is now an Action Item.

**Edie Jones moved and David Thorsett seconded that the board adopt the September 7, 2022 agenda with the above revisions. Vote was unanimous in favor, motion passed 5-0.**

### COMMUNITY COMMENTS

N/A

### BUSINESS/FINANCE REPORT

Sherry Joseph informed the board that there wasn't much to report on in regards to revenue and expenditures due to the school year just beginning. However, there is a correction to the June Resolution #21-22-02. ODE found she had combined the transfers and debt service into one line item, Sherry corrected the resolution and is asking the board to re adopt the amended resolution.

**Edie Jones moved and Asa Sarver seconded that the board adopt Resolution #21-22-02 with the above revisions. Vote was unanimous in favor, motion passed 5-0.**

### ADMINISTRATORS REPORT

#### Lorna Van Geem ~ Special Programs

Lorna reported that the Special Programs department has been busy with meetings and programing to make sure they are meeting student needs. Several move in students with complex needs, focus on support. The Transition Center Building has been relocated to the High School. Purchased new reading material and program to help with transition for graduating students to learn new transition skills. A sensory room has been built at the Elementary School for students to help with sensory breaks, routine based, 15 minute long to help regulate demand of academics. Help to decrease some behavior issues and

increase progress for learning. Three hour training with Occupational Therapist, Office Specialist and Speech Pathologist to work with Para Professionals and Kindergarten teachers to help with strategies for high needs students. Working with Tim and creating a space for complex needs students at the Middle School. Added intervention curriculum at the Middle School to help with needs. Para Professional position still available.

### **Joan Warburg ~ Elementary School**

Great start to the school year. Students started yesterday with the exception of pre-k and kindergartners. Assessed kindergarten students on Tues and Wed this week and are ready for Monday start. Kindergartners had their stop and drop to meet teachers, see classrooms and get a feel for the school. Pre-K will start on Tuesday with all spots filled (18). Joan had a nice shout out to the two custodians and the construction team for their help with moving spaces. Pre – K to Library and Library to modular bldg. Grateful for her team and the effort to get the building ready for students and how her teacher have created a beautiful space for students. The stop and drop for students last week was successful with a 95% turnout. All are excited.

### **Tim Roth ~ Middle School**

Tim reported that the Middle School wrapped up Summer School with finishing the mural next to the stage. A Hike and Read Camp in the woods and focused on Literacy work. Web Day – all 5<sup>th</sup> grade and new students spent the day with student leaders that gave them an orientation about the culture and what makes Sisters School District so awesome. They were able to go through their schedule and meet teachers. Open house was great – good attendance. Didn't do a head count but all the burgers and hot dogs were gone at the end. This was a great time with student families. David Thorsett gave a compliment from a parent that Tim has great energy and they are excited about the new school year and the move here. Students received their schedules and were able to meet teachers and roam the building. The first full day went smoothly and three sports started; cross country, football and volleyball.

### **Steve Stancliff ~ High School**

Wrapped up Summer School with a great finish. The IE program helped Mr. Runco design a gear trailer. Steve reported that they had a great in-service week with teachers and instructional assistants focusing on belonging from last year and meeting where the kids are at. Prepared for 22/23 and asked staff what does Sisters High School look like – process and feedback? Refreshed staff on evaluation process and time to transition to the new 3/5 schedule and to understand the logistics and the amount of work that goes into it. The first day of orientation for 9<sup>th</sup> grade was an awesome day. Connected 9<sup>th</sup> grade students to upper classman to help them connect and get a feel for the campus. Hoping to do more as mentors during the school year. Athletics off to great start, good energy and seeing faces is a great start. “Eddie complimented on “leveraging what they bring” empowering for students to know this.

### **SUPERINTENDENT REPORT**

- **Enrollment Report** – Curtiss reported that the original report was off by ten (the formula rolled over incorrectly and Lynne fixed it) Real numbers as of 9/2/22 are 1149, feels good and the highest the enrollment has been since he has been here. (will confirm) A more

accurate reading will be next month after the 10 day drops, changes, etc. take place. Largest opening numbers since COVID.

- **Bond Report** – Moving forward, Transition Center out, bus turnout and construction site for ES. Final bid documents, supply chain issues, trying to open in 2023 is nearly impossible. Completion set for the end of April 2024. Start with student's fall of 2024 with students in the new building.  
Haven't confirmed an opening ceremony as of yet but looking at October 2024.
- **University of Oregon** – Curt met with them today and board approved for Curt to partner with them for support. Strategic planning with U of O students, City Planning and Parks and Rec Division. They will be here October 7<sup>th</sup> to view the grounds and study what they need to move forward with the partnership. This is to work on best optimizing our assets for the City of Sisters. Focusing on Administration Property, Transportation and Grade School. Looking forward to this partnership and what it has to offer.

## **BOARD BUSINESS**

- **Transportation Letter** – If you live within a mile of a school there is not a requirement for busing and they will not reimburse you for it. In our district we have had a waiver because of Cascade Ave. running through town.
- The letter to the state by Ryan Stock is asking for supplemental transportation plan that would affect 10-15 elementary students. This is an Action Item.

**Jenica Cogdill moved and Edie Jones seconded the Board approve the Transportation Letter. The vote was unanimous in favor, motion carried 5-0.**

Board discussed the following 1<sup>st</sup> reading policies:

- JEA – Compulsory Attendance
- JECAC/GBH – Staff/Student/Parent Relations
- JHFE – Suspected Abuse of a Child Reporting Requirements
- JHHA - Crisis Prevention and Response
- JO/IGBAB – Education Records/Records of Students with Disabilities
- KGBB – Firearms Prohibited
- KL – Public Complaints

Board discussed the following policies for 2<sup>nd</sup> reading:

- IGBA – Students with Disabilities
- JB – Equal Education Opportunity
- JBAA – Section 504 – Students
- JECB – Admission of Nonresident Students
- JFC - Student Conduct and Discipline
- JFCF – Hazing/Harassment/Intimidation/Menacing/Bullying/Cyberbullying/Teen Dating Violence/Domestic Violence – Student

- JFCI – Substance/Drug Abuse
- JFCJ – Weapons at School
- JFCM – Threats of Violence
- JGA – Corporal Punishment
- JGDA/JGEA – Discipline of Disabled Students
- JGEA – Alternative Education Programs Following Expulsion
- JHCC – Communicable Diseases
- JHFF/GBNAA – Reporting Requirements for Suspected Sexual Conduct with Students
- JOA – Directory Information
- JOB – Personally Identifiable Information
- KAB – Parental Rights
- KBA – Public Records
- KG – Community Use of District Facilities
- KGE – Public Responsibility for Facility Usage
- KN – Relations with Law Enforcement Agency
- LBE – Public Charter Schools

**David Thorsett motioned and Edie Jones seconded the Board approve the 2<sup>nd</sup> reading policies with changes. The vote was unanimous in favor, motion carried 5-0.**

**CONSENT AGENDA:**

**Edie Jones moved and Asa Sarver seconded the Board approve the 09/07/22 consent agenda. The vote was unanimous in favor, motion carried 5-0.**

**ANNOUNCEMENTS**

<u>Date</u>	<u>Event</u>	<u>Time</u>	<u>Location</u>
10/05/22	Regular School Board Meeting	6:00pm	DO

**ADJOURNMENT**

The meeting was adjourned at 7:00 p.m.

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David Thorsett, Chairman

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Jane Ashley, Board Secretary



# Sisters School District

“Home of the Outlaws”

Board of Directors Meeting  
 Sisters School District Administrative Office  
 September 7, 2022 6:00 p.m.

## School Board Agenda

<u>Order of Meeting</u>	<u>Presenter</u>	<u>Action</u>	<u>Tab</u>
<b>Call to Order</b>	<b>David Thorsett</b>		
<b>Pledge of Allegiance</b>	<b>David Thorsett</b>		
<b>Additions or Revisions to Agenda</b>	<b>David Thorsett</b>		
<b>Adoption of Agenda</b>	<b>David Thorsett</b>	Action	
<b>Community Comments</b>			
<i>Opportunity for district citizens to speak on agenda or non-agenda item</i>			
<b>Business/Finance Report</b>	<b>Sherry Joseph</b>	Report	Tab H
➤ Revenue/Expenditures			
➤ Resolution #21-22-02 Correction			Tab H
<b>Administrator/Building Reports</b>			
➤ SES	<b>Joan Warburg</b>	Report	
➤ SMS	<b>Tim Roth</b>	Report	
➤ SHS	<b>Steve Stancliff</b>	Report	
➤ Special Programs	<b>Lorna Van Geem</b>	Report	
<b>Superintendent Report</b>	<b>Curt Scholl</b>	Report	
➤ Enrollment Update			Tab D
➤ Bond Update			
<b>Board Business</b>	<b>David Thorsett</b>		
➤ Transportation Letter		Report	Tab G
➤ 1 <sup>st</sup> Reading Policies		Report	Tab L
○ JEA – Compulsory Attendance			
○ JECAC/GBH – Staff/Student/Parent Relations			
○ JHFE – Suspected Abuse of a Child Reporting Requirements			
○ JHHA - Crisis Prevention and Response			
○ JO/IGBAB – Education Records/Records of Students with Disabilities			
○ KGBB – Firearms Prohibited			
○ KL – Public Complaints			



# Sisters School District

“Home of the Outlaws”

Curtiss Scholl  
Superintendent

- |  |        |       |
|--|--------|-------|
| ➤ 2 <sup>nd</sup> Reading Policies   | Action | Tab M |
| ○ IGBA – Students with Disabilities  |        |       |
| ○ JB – Equal Education Opportunity   |        |       |
| ○ JBAA – Section 504 – Students  |        |       |
| ○ JECB – Admission of Nonresident Students   |        |       |
| ○ JFC – Student Conduct and Discipline   |        |       |
| ○ JFCF – Hazing/Harassment/Intimidation/Menacing/Bullying/Cyberbullying/Teen Dating Violence/Domestic Violence – Student |        |       |
| ○ JFCI – Substance/Drug Abuse  |        |       |
| ○ JFCJ – Weapons at School   |        |       |
| ○ JFCM – Threats of Violence   |        |       |
| ○ JGA – Corporal Punishment  |        |       |
| ○ JGDA/JGEA – Discipline of Disabled Students  |        |       |
| ○ JGEA – Alternative Education Programs Following Expulsion  |        |       |
| ○ JHCC – Communicable Diseases   |        |       |
| ○ JHFF/GBNAA – Reporting Requirements for Suspected Sexual Conduct with Students   |        |       |
| ○ JOA – Directory Information  |        |       |
| ○ JOB – Personally Identifiable Information  |        |       |
| ○ KAB – Parental Rights  |        |       |
| ○ KBA – Public Records   |        |       |
| ○ KG – Community Use of District Facilities  |        |       |
| ○ KGE – Public Responsibility for Facility Usage   |        |       |
| ○ KN – Relations with Law Enforcement Agency   |        |       |
| ○ LBE – Public Charter Schools   |        |       |

- |   |                       |        |       |
|---|-----------------------|--------|-------|
| <b>Consent Agenda</b>                             | <b>David Thorsett</b> | Action |       |
| ➤ Aug 18, 2022 Board Work Session Meeting Minutes |                       |        | Tab K |
| ➤ Aug 18, 2022 Board Meeting Minutes              |                       |        | Tab K |
| ➤ New Hire Melissa Smith, SSD ELL Teacher         |                       |        | Tab J |

## Announcements

<u>Date</u>	<u>Event</u>	<u>Time</u>	<u>Location</u>
10/05/2022	Regular Board Meeting	6:00pm	DO

## Adjourn

# Oregon State Board of Education

June 15, 2023

AGENDA ITEM: 3.G.

<p><b>SUBJECT:</b> State Board of Education Board Leadership <b>STAFF NAME &amp; OFFICE:</b> Corey Rosenberg, SBE Administration</p> <p>Election of State Board of Education Chair, Vice Chair, &amp; 2<sup>nd</sup> Vice Chair. to serve July 1, 2023 – June 30, 2024</p> <p><input type="checkbox"/> New Rule <input type="checkbox"/> Amend Existing Rule <input type="checkbox"/> Repeal Rule</p>	<p><input type="checkbox"/> <b>First Reading</b> <input type="checkbox"/> Presentation <input type="checkbox"/> No Presentation</p> <p><input checked="" type="checkbox"/> <b>Action</b> <input type="checkbox"/> Temp Rule <input type="checkbox"/> Presentation <input checked="" type="checkbox"/> No Presentation</p>
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## BACKGROUND

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The State Board of Education Procedures & Policy Manual states in Policy Number 101 that each year, the board will elect their Chair, Vice Chair, 2<sup>nd</sup> Vice Chair. The Board is to create a committee of two to three Board members to nominate Board leadership. This year, George Russell and Kimberly Howard Wade were the nominating committee. They make the following nominations:

**Chair:** Guadalupe Martinez-Zapata

Duties of the Chair:

- Sets agenda.
- Presides at meetings.
- Ensures fairness and impartiality.
- Enforces parliamentary procedure.
- Acts as the primary spokesperson to the press for the board.
- Performs other duties as may be required by law or action of the board.
- Names members for board subcommittees and liaisons, unless a majority of the board votes otherwise.
- Serves as an ex-officio member on board subcommittees.
- Calls special meetings not on board's adopted calendar.

**Vice-Chair:** Jennifer Scurlock

Duties of the Vice Chair:

- Presides at meetings in the event of an absence of the Chair.
- Performs other duties as directed by the Chair or the vote of the board.

**2<sup>nd</sup> Vice-Chair:** Shimiko Montgomery

Duties of the Second Vice Chair:

- Presides at meetings in the event of an absence of the Chair and Vice Chair.
- Performs other duties as directed by the Chair or the vote of the board.

# Oregon State Board of Education

June 15, 2023

AGENDA ITEM: 3.G.

## SUMMARY OF PREVIOUS BOARD ACTION

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Previously, Guadalupe Martinez-Zapata served as Chair, Jennifer Scurlock served as Vice-Chair, and Bridgett Wheeler served as 2<sup>nd</sup> Vice-Chair. According to the State Board Procedures and Policy Manual, an individual serving as Chair may do so for up to two consecutive years, pending renomination and board approval. Guadalupe Martinez-Zapata is therefore eligible to serve as Chair for an additional year. There are no limits on the number of terms a member may serve in the Vice-Chair or 2<sup>nd</sup> Vice-Chair positions.

## HAS THE RULE CHANGED SINCE LAST BOARD MEETING?

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

## POLICY ISSUE OR CONCERNS

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The State Board of Education has clear guidelines to select their Board leadership. The Board administrator is asked to create a nominating committee comprised of two to three Board members. However, the Board administrator removes themselves from nominating committee discussions. Once the nominating committee discusses Board leadership, they alert the Board administrator of their nominations after they speak to the nominees. Board administrator then presents the nominations to the full Board as a first reading. The first reading alerts the public that the Board is considering these Board members for leadership positions and allows for public comments on these recommendations. The full Board will take action in June of 2023.

## EQUITY IMPACT ANALYSIS

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Since the Board's Policy & Procedures manual describes a process of nominating Board leadership, outside educational stakeholders, school districts, or advisory groups are not included in the nomination committee deliberations. The opportunity to provide feedback on Board leadership is open during the first reading in May and action in June.

The Board of Education is focused on equity, diversity, and inclusion. The nominating committee took into account not only professional experience but also background coupled with experience on the board.

## FISCAL ANALYSIS

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This will not have fiscal impact on the Board, the Department of Education or school districts.

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

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# Oregon State Board of Education

June 15, 2023

AGENDA ITEM: 3.G.

A rejection of the nominating committee recommendations would trigger a Board conversation about who will be part of Board leadership. Accepting the recommendations of the nominating committee, would mean that the current nominees would serve as Chair, Vice-Chair and 2<sup>nd</sup> Vice-Chair for the State Board of Education for the period of July 1, 2023 to June 30, 2024.

## STAFF RECOMMENDATION

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

## ATTACHMENTS

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None

# 2023/24 State Board of Education Calendar

August 2023						
Su	Mo	Tu	We	Th	Fr	Sa
		1	2	3	4	5
6	7	8	9	10	11	12
13	14	15	16	17	18	19
20	21	22*	23*	24	25	26
27	28	29	30	31		

September 2023						
Su	Mo	Tu	We	Th	Fr	Sa
					1	2
3	4	5	6	7	8	9
10	11	12	13	14	15	16
17	18	19	20	21	22	23
24	25	26	27	28	29	30

October 2023						
Su	Mo	Tu	We	Th	Fr	Sa
1	2	3	4	5	6	7
8	9	10	11	12	13	14
15	16	17	18	19	20	21
22	23	24	25	26	27	28
29	30	31				

November 2023						
Su	Mo	Tu	We	Th	Fr	Sa
			1	2	3	4
5	6	7	8	9	10	11
12	13	14	15	16	17	18
19	20	21	22	23	24	25
26	27	28	29	30		

December 2023						
Su	Mo	Tu	We	Th	Fr	Sa
					1	2
3	4	5	6	7	8	9
10	11	12	13	14	15	16
17	18	19	20	21	22	23
24	25	26	27	28	29	30
31						

January 2024						
Su	Mo	Tu	We	Th	Fr	Sa
	1	2	3	4	5	6
7	8	9	10	11	12	13
14	15	16	17	18	19	20
21	22	23	24	25	26	27
28	29	30	31			

February 2024						
Su	Mo	Tu	We	Th	Fr	Sa
				1	2	3
4	5	6	7	8	9	10
11	12	13	14	15	16	17
18	19	20	21	22	23	24
25	26	27	28	29		

March 2024						
Su	Mo	Tu	We	Th	Fr	Sa
					1	2
3	4	5	6	7	8	9
10	11	12	13	14	15	16
17	18	19	20	21	22	23
24	25	26	27	28	29	30
31						

April 2024						
Su	Mo	Tu	We	Th	Fr	Sa
	1	2	3	4	5	6
7	8	9	10	11	12	13
14	15	16	17	18	19	20
21	22	23	24	25	26	27
28	29	30				

May 2024						
Su	Mo	Tu	We	Th	Fr	Sa
			1	2	3	4
5	6	7	8	9	10	11
12	13	14	15	16	17	18
19	20	21	22	23	24	25
26	27	28	29	30	31	

June 2024						
Su	Mo	Tu	We	Th	Fr	Sa
						1
2	3	4	5	6	7	8
9	10	11	12	13	14	15
16	17	18	19	20	21	22
23	24	25	26	27	28	29
30						

July 2024						
Su	Mo	Tu	We	Th	Fr	Sa
	1	2	3	4	5	6
7	8	9	10	11	12	13
14	15	16	17	18	19	20
21	22	23	24	25	26	27
28	29	30	31			

\* Board Retreat  
 Dates in **Blue** are prioritized in-person  
 Dates in **Red** are hybrid

# Oregon State Board of Education

June 15, 2023

AGENDA ITEM: 4.A.

<p><b>SUBJECT:</b> OAR 581-022-2220</p> <p><b>STAFF NAME &amp; OFFICE:</b> Kati Moseley and Haedon Brunelle, Office of the Director</p> <p>This rule revision updates health services standards for public schools. The rule's proposed updates aligns findings from recent independent evaluation of Oregon's public health response to COVID-19. The revisions help schools invest in comprehensive emergency preparedness, continues to invest in partnerships between the education and public health sectors, emergency operations efficiency and timeliness, defines roles and expectations involved in public health responses, supports disease investigation training and resources to respond to communicable diseases, and coordinates messages across public health and education organizations.</p> <p><input type="checkbox"/> New Rule <input checked="" type="checkbox"/> Amend Existing Rule <input type="checkbox"/> Repeal Rule</p>	<p><input type="checkbox"/> <b>First Reading</b> <input type="checkbox"/> Presentation <input type="checkbox"/> No Presentation</p> <p><input checked="" type="checkbox"/> <b>Action</b> <input type="checkbox"/> Temp Rule <input type="checkbox"/> Presentation <input checked="" type="checkbox"/> No Presentation</p>
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## BACKGROUND

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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. 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 promulgated in rule, nursing-to-student ratios are established, as well as first aid certified staff-to-student ratios are established.
    - ii. ODE has undertaken this update 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. The COVID-19 pandemic shed 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.
    - iii. This rule has not been updated since 1996. This rule currently references outdated rules and statutes. This update reflects current OAR and statutes.

# Oregon State Board of Education

June 15, 2023

AGENDA ITEM: 4.A.

- 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?
    - 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

# Oregon State Board of Education

June 15, 2023

AGENDA ITEM: 4.A.

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
  - 9. ODE held a public comment on this rule on May 5, 2023.
- c. Who may be affected by this?
  - i. Youth who attend public school districts, public charter schools or programs offered by Education Service Districts.
  - ii. School district superintendents, and public charter school administrators, as well as principals, school nurses, and other school staff that will be assigned roles relating health services planning and delivery, as well as communicable disease management.
  - iii. 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.
  - ii. This rule update does not change expectations for schools, it has added clarity to expectations that exist in statute.

## SUMMARY OF PREVIOUS BOARD ACTION

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- 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.
  - b. This OAR is following up a first reading from the April 20, 2023 Board meeting.

## HAS THE RULE CHANGED SINCE LAST BOARD MEETING?

---

# Oregon State Board of Education

June 15, 2023

AGENDA ITEM: 4.A.

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

## POLICY ISSUE OR CONCERNS

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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. 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

# Oregon State Board of Education

June 15, 2023

AGENDA ITEM: 4.A.

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 students

Staff 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.
  - 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.

# Oregon State Board of Education

June 15, 2023

AGENDA ITEM: 4.A.

- 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 with this updated OAR will continue to receive dedicated attention from ODE staff. 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

# Oregon State Board of Education

June 15, 2023

AGENDA ITEM: 4.A.

guidance. The goal is to ensure an efficient guidance drafting process for smaller and medium districts.

## EQUITY IMPACT ANALYSIS

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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

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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?

# Oregon State Board of Education

June 15, 2023

AGENDA ITEM: 4.A.

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

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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.

## STAFF RECOMMENDATION

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

## ATTACHMENTS

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Attachment 1:

Draft Health Services Rule

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) Dental, vision and hearing 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.

(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

# Oregon State Board of Education

## MEETING DATE

AGENDA ITEM: Adoption of Oregon’s Transformative SEL Framework & Standards

<p><b>SUBJECT:</b> Adoption of Oregon’s Transformative Social Emotional Learning (SEL) Framework &amp; Standards</p> <p><b>STAFF NAME &amp; OFFICE:</b></p> <ul style="list-style-type: none"><li>● Alexa Pearson, Office of Teaching, Learning and Assessment</li><li>● Vanessa Martinez, Office of Teaching, Learning and Assessment</li><li>● Beth Wigham, Office of Teaching, Learning and Assessment</li></ul>	<p><input checked="" type="checkbox"/> <b>Adoption</b></p>
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### BACKGROUND

[ORS 329.045](#) was passed by the Oregon Legislature in 2021, with support from the Governor’s Racial Justice Council, community-based organizations, and the Oregon Department of Education (ODE). Section 4 of the bill directs ODE to convene an advisory group to propose to the State Board of Education (SBE): a) recommendations for standards for social emotional learning (SEL); and b) a recommended framework for SEL.

The first step in this process was the facilitation of the Phase 1 SEL Advisory Group to develop a report, “[Preliminary Description of the Proposed Social Emotional Learning Standards Framework: HB 2166.](#)” This report was presented to the State Board of Education on September 22, 2022 as an informational report. HB 2166 further requires the SBE to consider this report when adopting the SEL framework and standards for K-12 public school students.

The second step in this process was for ODE to facilitate the Phase 2 SEL Advisory Group that included 26 members from across the state and from a variety of roles: 7 TOSAS, 2 principals, 5 District admin, 2 Social Workers, 3 counselors, 5 teachers, 1 ESD Director, 1 Title VI Program Manager. The Advisory Group’s charge was to build from the recommendations in the preliminary report and develop Oregon’s Transformative SEL Framework with K-12 Student Standards. HB 2166 requires ODE to present the SEL framework and standards to the SBE for adoption no later than September 15, 2023 and for districts to implement no later than July 1, 2024.

During the development of the framework and standards, ODE hosted numerous feedback listening sessions where the SEL Framework and Standards were shared:

- Counseling Leadership Network (January 5, 2023)
- Oregon Association of Central Office Administrators Winter Conference (January 26, 2023)
- Youth ERA (March 20, 2023)
- OHA Statewide Youth Health Council (March 21, 2023)
- LGBTQ2SIA+, Latinx/Indigenous, American Indian/Alaska Native, African American/Black Student Success Groups, SACSE, & English Learner Groups (March 21, 22, and 23, 2023)
- OAESD SEL/SEB Collaborative (April 21, 2023)
- LGBTQ2SIA+ Student Success Group (May 2, 2023)

# Oregon State Board of Education

## MEETING DATE

AGENDA ITEM: Adoption of Oregon's Transformative SEL Framework & Standards

A state-wide survey (590 respondents) was also open from March 17 - April 7 to get feedback on the draft of the standards. The survey included likert scale and qualitative questions for each of the standards on:

- Clarity: How clearly the standard describes what students need to know and be able to do
- Implementation: How easily they can see teaching and/or using this standard with students in the classroom, school, district, and community.
- Equity Impact: How might this standard cause unintended consequences to historically underserved student populations (i.e. students underserved because of disabilities, gender identity and expression, sexual orientation, and/or racial, cultural, or linguistic backgrounds)?

Throughout engagement, a variety of themes surfaced:

- Youth Engagement Listening Sessions (Youth Era & OHA Statewide Youth Health Council):
  - There is currently not enough focus on SEL in schools
  - Stand-alone SEL lessons are ineffective
  - Adults need to model SEL
  - Appreciate when SEL is integrated across all content areas and contexts of the school day
  - SEL should focus on developing skills in the areas of relationships, empathy, and communication
- Engagement Listening Sessions and State-wide survey:
  - What resonated:
    - Over 72% of respondents agreed/strongly agreed that all the standards were clear
    - 80% of respondents agreed/strongly agreed that they could see teaching and/or using all the standards with students in the classroom, school, district, and community
    - All adults are SEL teachers
    - The framework is grounded in adult & systemic SEL approaches
    - The whole school and district culture needs to embody Transformative SEL
    - Transformative SEL recognizes SEL must be culturally & linguistically responsive.
  - What Needs & Concerns surfaced:
    - Educators will need support with implementation and opportunities to collaborate
    - Professional learning will be necessary to mitigate bias
    - Indicators for each standard would be helpful
    - Measuring standards is problematic because of the role bias can play
    - Educators will need curriculum and instructional materials to support
    - Adult SEL training and implementation should come before implementation of the SEL standards with students
    - Some respondents do not believe SEL should be taught in schools and that schools should focus on reading, writing, and math

The Phase 2 SEL Advisory Group considered and incorporated feedback throughout the development and revision process of the Transformative SEL Framework and Standards.

## SUMMARY OF PREVIOUS BOARD ACTION

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# Oregon State Board of Education

## MEETING DATE

AGENDA ITEM: Adoption of Oregon’s Transformative SEL Framework & Standards

The State Board of Education received an informational update on the implementation of HB 2166 along with the [“Preliminary Description of the Proposed Social Emotional Learning Standards Framework: HB 2166”](#) report at the June 16, 2022 and the September 22, 2022 meetings. At that time, it was shared that HB 2166 requires this report to be considered when adopting the SEL Framework and Standards.

The State Board of Education received a first read of Oregon’s Transformative SEL Framework and Standards at the May 18th, 2023 meeting.

### HAS THE ITEM CHANGED SINCE LAST BOARD MEETING?

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

After the first reading at the May State Board meeting, there were no public comments received. The Phase 2 SEL Advisory Group met again on June 1st to finalize the draft initially shared with the Board. The changes include:

- Changed “House Bill 2166” to “ORS” language throughout the document.
- In Component 3: Transformative Adult SEL:
  - Prioritize adult well-being: Added a sentence on compassion fatigue, vicarious trauma and educator burnout.
  - Embed Transformative SEL Standards & Practices: Changed the header from “Embed Transformative SEL in Professional Learning” to “Embed Transformative SEL Standards & Practices” to broaden the scope and places where Transformative SEL can be integrated.
- Changed the wording from “Transformative SEL K-12 Student Standards” to “Transformative SEL Standards” to reflect the intention that the standards be used alongside adults.
- Included a title page for the “Transformative SEL Standards.”
- Formatted the standards so they each fit on one page.
- Added glossary definitions for: positionality, intersectionality, regulation, dysregulation
- Clarified and adapted language in the “identity” glossary definition to be more expansive to LGBTQ2SIA+ communities.

### POLICY ISSUE OR CONCERNS

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In 2011, a meta-analysis on SEL found that when students have supportive relationships and opportunities to develop and practice social, emotional, and cognitive skills across many different contexts, their academic learning accelerates (Durlak et al., 2011). There are hundreds of studies that offer consistent evidence that SEL bolsters academic performance. It is, however, important to consider that if SEL Standards are implemented incorrectly, it could cause systemic and racial inequities, deficit-based approaches, and further trauma and harm to students and families.

#### Positive Effects

# Oregon State Board of Education

## MEETING DATE

AGENDA ITEM: Adoption of Oregon's Transformative SEL Framework & Standards

While SEL supports academic outcomes, the benefits of SEL transcend academic achievement and can lead to a more just, vibrant, and inclusive society. In order to achieve this vision for SEL, schools need to understand how inequity causes harm and examine how the conditions within schools “cause, exacerbate, or perpetuate trauma” (Venet, 2021). SEL provides an intentional approach to building student assets, creating a sense of belonging, and developing agency and identity. SEL supports education equity in multiple ways such as promoting whole-child development, elevating the social and interconnected nature of learning, advancing the belief that all children can learn, developing young people's skills to navigate across social contexts, and providing ways for improving relationships between students and adults.

SEL is intertwined with academic learning because all learning is social and emotional. It is critical for schools and districts to create culturally and racially affirming SEL practices that center equity and acknowledge students' lived experiences within a socio-political context so every student can thrive.

SEL provides opportunities for all students to learn and build on skills that will support their academic development and build student agency. It helps create an inclusive and affirming school environment where everyone belongs. This can result in the reduction of overrepresentation in Special Education identification and exclusionary discipline practices, and an improvement to students' sense of belonging and graduation rates.

There has been an ongoing partnership with the Teacher Standards and Practices Commission (TSPC) who has also developed a [Transformative SEL Framework and Standards](#) for pre-service educator programs. The alignment between TSPC and ODE will support adults in Educator Prep Programs and those participating in Student Teacher Practicum placements with current Transformative SEL practices. This ensures that the future educator workforce will be trained in how to integrate Transformative SEL into their classroom and school community.

Oregon's Transformative SEL Framework and Standards will also build on the foundation of [Oregon's Early Learning and Kindergarten Guidelines](#) to continue to develop students' social and emotional learning and support adults with a systemic and integrated approach to implementation of SEL across K-12 settings. This is an area to continue to align and build from in our implementation phase of the work.

Finally, the pillars of ODE's [Integrated Model for Mental Health](#) are embedded across Oregon's Transformative SEL Framework and Standards to reinforce the overall health of the learning community that is essential for creating the conditions for students to learn, teachers to teach, and individuals to thrive.

### **Negative Effects/Barriers**

Members of the Phase 1 and 2 SEL Advisory Groups had many conversations regarding the potential unintended consequences of only focusing on Student Standards and they recognized the importance of creating a systemic approach to SEL that supports the whole school and district community and that involves and includes adults.

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Potential barriers include the possibility of the initiative not being adequately funded or supported, and ongoing implementation efforts and professional learning not being continuous and sustainable. Likewise, if SEL is implemented with a focus solely on addressing discrete student skills, without attention to addressing adult and systemic SEL approaches, SEL implementation may fail and cause harm. Student standards alone without explicit attention to the role adults and systems play have the potential to promote a deficit mindset related to student behaviors and abilities. SEL, without being grounded in racial equity, may perpetuate inequities through adults’ implicit bias.

Furthermore, SEL has recently been misunderstood and mischaracterized in some highly visible media spaces which has impacted public perception and led to removing these intentional supports from schools. For these reasons, it remains important to clearly describe, define, and communicate that SEL is an integral component of teaching and learning in classrooms across Oregon, from kindergarten classrooms to high school.

Another key consideration is that there are districts and ESDs across Oregon that have already adopted social emotional standards, and most have developed those from CASEL’s five competency areas (self-awareness, self-management, social awareness, relationship skills, and responsible decision-making). These districts and ESDs have spent money, resources, FTE, and time on instructional materials. The new Transformative SEL student standards are rooted in equity because they braid CASEL’s five competency areas with CASEL’s five focal constructs (identity, agency, belonging, collaborative problem-solving, and curiosity). They will likely require a pivot in order to fully actualize the new SEL framework and standards in 2024. By contrast, districts who have not yet taken action will benefit from state supported SEL standards, professional learning opportunities, and instructional materials. This could feel as though the policy is penalizing early adopters of SEL practices, thereby creating implementation challenges.

### Mitigation

Oregon’s Transformative SEL Framework and Standards incorporate and address key barriers as a way to mitigate unintended consequences and create a vision for a systemic approach to SEL. This includes:

1. **The Guiding Principles** are the values and beliefs designed to guide decisions and implementation efforts that are grounded in culturally and community responsive values, prioritize student strengths, and consider how environments and practices need to be trauma-informed and seen through a lens of neuroscience and the science of learning.
2. **The Conditions for Learning and Thriving** describe the ways to cultivate SEL across systems, policies, practices, and environments. This places the onus on system level shifts that need to happen so that the focus is not on student deficits or discrete skills alone. This is achieved through cultivating authentic partnerships, adopting equitable policies, and creating thriving learning environments.
3. **Adult SEL** considers the resources, supports, and conditions that adults need to nurture their wellbeing so that they can in turn support students with their Transformative SEL development. Their role in co-constructing learning environments and seeking feedback from students is foundational to creating conditions that support learning and thriving. When educators are supported in their own self-care and support one another, this allows them to show up for students where they can model and coach SEL alongside their students. The need for ongoing professional learning opportunities is essential to supporting educators with the

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implementation of Transformative SEL, as is exploring one’s biases and how to integrate SEL into the day-to-day functioning of the school community.

4. **Student SEL** recognizes that the K-12 Standards need to be integrated into every content area and context in the school day. The standards are created in a way to be nimble and flexible enough to be used by any adult and as individual and communal practices to cultivate and nurture Transformative SEL across the system. It is not a curriculum or program, but rather an approach to how adults and students show up for each other. Oregon’s Transformative SEL Framework describes how the standards are designed to be used as a formative way for adults to create opportunities for reciprocal feedback that includes dialogue, reflection, goal-setting and increasing individual and collective awareness and growth.

Some of the ways ODE is planning to support the implementation of Transformative SEL are to:

- Identify, and create where needed, supplemental instructional materials to support Transformative SEL practices through open and free resources
- Provide professional learning that supports pedagogical approaches to Transformative SEL.
- Create opportunities for districts to network and share promising practices during implementation

### EQUITY IMPACT ANALYSIS

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Oregon’s Transformative SEL Framework and Standards have been developed to live into the definition of Transformative SEL:

“Transformative SEL is a process whereby young people and adults build strong, respectful, and lasting, relationships that facilitate co-learning to critically examine root causes of inequity, and to develop collaborative solutions that lead to personal, community, and societal well-being. This form of SEL is aimed at redistributing power to more fully engage young people and adults in working toward just and equitable schools and communities. It emphasizes the development of identity, agency, belonging, curiosity, and collaborative problem-solving.” (CASEL).

The Phase 2 SEL Advisory Group was committed to developing a framework and standards that advance educational equity and excellence for every student. Oregon’s Transformative SEL Framework provides a **systemic approach to helping address various forms of inequity and empower young people and adults to co-create thriving schools and contribute to safe, healthy, and just communities.**

The framework and standards intentionally incorporate essential elements from ODE’s culturally specific [Student Success Plans](#) to support a Transformative approach to SEL with a **focus on historically and currently underserved communities.** Transformative SEL supports education equity in multiple ways such as promoting whole-child development, elevating the social and interconnected nature of learning, advancing the belief that all children can learn, developing young peoples’ skills to navigate across social contexts, and providing ways for improving relationships between students and adults that are grounded in authenticity.

SEL instruction cannot reach students unless **an understanding of the cultural contexts** in which students are raised exists. A Transformative approach moves away from SEL that elevates or privileges norms and values of individualistic cultures, which are dominant in the United States. We know that this can marginalize students from collectivistic cultures, deepening existing racial, ethnic, class, and gender

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disparities. To create the conditions for social, emotional, and academic development of students, a focus needs to be on the adults (school staff and parents) and the climate and culture of schools.

As Oregon’s Transformative SEL Framework is implemented and supported at the state level, it will be necessary to support districts in identifying and partnering with culturally specific organizations that are culturally responsive to the unique needs of local communities. ODE, in partnership with districts, will have much to learn from communities and families as we move forward together.

### FISCAL ANALYSIS

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Full implementation of Oregon’s Transformative SEL Framework and Standards at the student and system level will take strategic and substantial investment in time, resources, collaboration, and leadership support at all levels of the education system. This will mean a systemic approach to implementation that involves everyone from district and school leaders to community partners and families. There could be additional fiscal costs to districts and ESDs as they support the new SEL Framework and Standards (professional learning, bringing teams together to collaborate, and additional FTE to support district level implementation).

Engagement and feedback has continued to elevate the need for a thoughtful implementation plan that considers what adequate resources and supports students, educators, caregivers, and community partners will require. Given that Transformative Social Emotional Learning is new in concept and there is **currently no aligned curriculum** to match the Transformative Standards (braiding the CASEL competencies with the focal constructs), implementation will require a heavy lift in developing resources and materials that support the new approach to SEL. To support the new Transformative SEL standards there will need to be **intentional focus on the processes, systems, and structures at the classroom, school, and district level** that create the conditions for learning and thriving (as opposed to lessons that support student SEL skills).

### EFFECT OF A “YES” OR “NO” VOTE

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A “Yes” vote means Oregon’s Transformative SEL Framework and Standards will be adopted and implemented in districts.

A “No” vote means Oregon’s Transformative SEL Framework and Standards will not be adopted by the September 15, 2023 deadline written in HB2166.

### STAFF RECOMMENDATION

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Approve  Approve next month  No recommendation at this time

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

### REFERENCES

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# Oregon State Board of Education

## MEETING DATE

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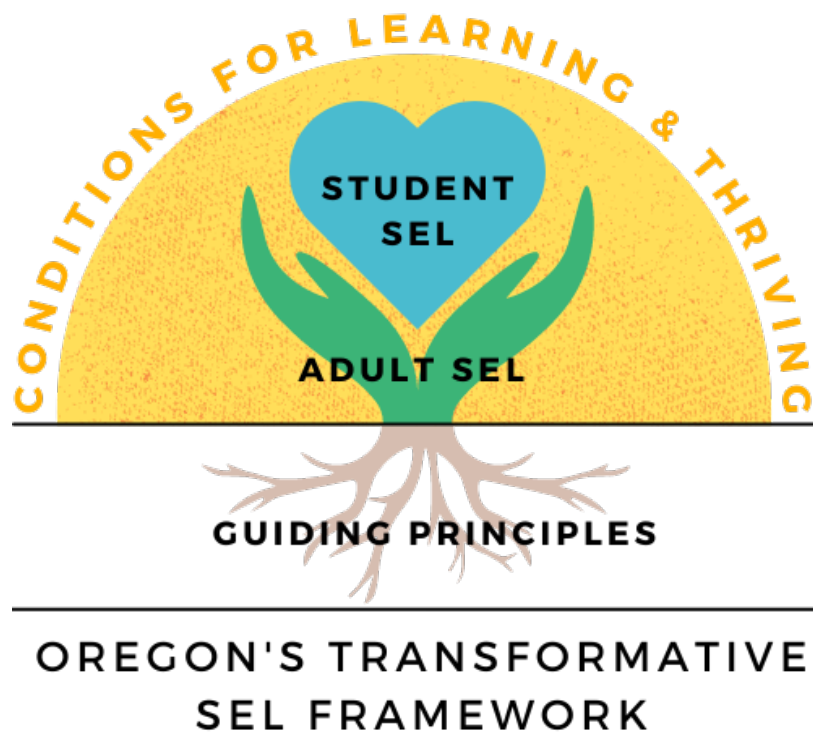
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## ATTACHMENTS

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- Attachment 1: Final draft of [Oregon’s Transformative SEL Framework & Standards](#) by the Phase 2 SEL Advisory Group
- Attachment 2: “[Preliminary Description of the Proposed Social Emotional Learning Standards Framework: HB 2166](#)” by the Phase 1 SEL Advisory Group

# Oregon's Transformative Social and Emotional Learning Framework & Standards



**June 2023**

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Oregon’s Transformative Social and Emotional Learning (SEL) Framework and Standards were developed by ODE’s Phase 2 SEL Advisory Group.

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## Introduction

Social and Emotional Learning (SEL) is at the center of how humans learn and thrive. At its core, SEL is about recognizing learning as a social and emotional process. While there are many definitions for SEL, the one most cited in the research is from the Collaborative for Academic, Social, and Emotional Learning (CASEL):

[SEL is] an integral part of education and human development. SEL is the process through which all young people and adults acquire and apply the knowledge, skills, and attitudes to develop healthy identities, manage emotions and achieve personal and collective goals, feel and show empathy for others, establish and maintain supportive relationships, and make responsible and caring decisions. (CASEL, n.d.)

SEL is already a key component of teaching and learning in many places across Oregon, from kindergarten classrooms to high school. Some of the ways SEL is integrated with academic learning in classrooms is through:

- Empathizing with a protagonist’s emotions when reading allows students to interpret narrative texts;
- Collaborating with fellow students on research projects applies social skills for academic success;
- Ethical deliberations that balance technical knowledge as students make scientific discoveries or learn about current events;
- Physical activity which nurtures mental and emotional well-being as students develop healthy practices to last a lifetime;
- Learning how to navigate social settings with confidence and respect develops students’ interpersonal and employability skills.

Oregon’s vision for SEL builds on these existing efforts by providing intentional focus on the social and emotional elements of learning, teaching, and cultivating affirming school cultures through a transformative approach. Oregon’s Transformative SEL Standards help provide a well-rounded education that teaches to the whole child, builds on their strengths, perspectives, and contributions, and guides the interactions

“Social emotional learning is about how to healthily interact with others and take care of yourself and your emotions.”  
- Oregon Student

This quotation comes from student engagement with the Oregon Health Authority Statewide Youth Health Council and Youth Era.

and relationships between students and adults. SEL equips students with the skills needed for college, career, and life.

## Purpose

Oregon’s Transformative SEL Framework is intended to enact [ORS 329.045](#) and help build capacity for strengthening equity-focused school cultures that support student and adult well-being. A focus on Transformative SEL enables students and adults to be affirmed in their identities, where they can develop a sense of agency and belonging, engage in collaborative problem-solving, and deepen their curiosity about the kind of society they want to make a reality.

The purpose of the Framework is to:

1. Create statewide coherence and clarity;
2. Fulfill the intention of [ORS 329.045](#) and the [Preliminary Description of the Proposed Social Emotional Learning Standards Framework for Oregon](#) to develop a vision of Transformative SEL in Oregon;
3. Build on the foundation of [Oregon's Early Learning and Kindergarten Guidelines](#) to continue to develop students’ social and emotional learning across K-12 settings;
4. Expand on the SEL pillar of ODE’s [Integrated Model for Mental Health](#);
5. Describe the necessary [components and conditions](#) to create a Transformative SEL ecosystem in schools and districts; and
6. Define [Oregon’s Transformative SEL Standards](#) that will be taught, modeled, coached, and nurtured in schools and districts.

Oregon’s Transformative SEL Framework describes the conditions that transform learning environments to support whole child approaches in meeting the full scope of students’ social, emotional, and academic needs. These conditions include partnerships, policies, and practices that support both Adult and Student SEL. The conditions and Oregon’s Transformative SEL Standards are reciprocal and dynamic; the more everyone in the system develops and enhances their social and emotional competence, the more capable they are of cultivating conditions for learning and thriving.

“Classrooms can be places of hope, where students and teachers gain glimpses of the kind of society we could live in where students learn the academic and critical skills needed to make it a reality” (Au et al., 2007).

## Audience

Each partner in the learning community plays a role in supporting Transformative SEL and contributing to the overall well-being of the learning community.

**Families and Caregivers** are a child’s first teacher and play a primary role in supporting social and emotional development. Families and caregivers are experts about their children. This makes them critical partners in supporting social and emotional learning efforts at home and in the learning community. When schools and families work together, they generate a circle of support for the child and strengthen their sense of belonging, agency, and capacity to co-create equitable learning environments.

**Students** are at the heart of Oregon’s Transformative SEL Framework and supported by the entire learning community. Students have the right to learn in environments that honor their whole selves, including their aspirations, their interests, and their cultural and linguistic assets. Each student brings tremendous strengths and unique ways of being that contribute to a vibrant learning community, where they help create the conditions to support each other in their learning. When adults support students to develop agency, follow their curiosity, and affirm their developing identities, students are empowered to develop important life skills that lead to meaningful lives after graduation.

**Educators** (all adults working and volunteering with students) are vital to the creation of caring and equitable education environments where everyone can take risks with their learning. Because all learning is social and emotional, everyone in the educational system plays a role in supporting and developing student and adult SEL. When educators view themselves as reciprocal learners alongside students and families, they can better guide and facilitate learning that feels responsive, inclusive, and engaging. Educators’ own critical awareness and identity development can be a lever for supporting students more equitably and holistically.

**Educational Leaders** are uniquely poised to prioritize, integrate, and build capacity for Transformative SEL for both adults and students because of their role in decision-making at a systems level. Leaders can guide and align instructional efforts and initiatives to build coherence in supporting the whole child by creating equitable systems, embedding Transformative SEL in ongoing professional learning and creating a culture of collaboration and well-being for all members of the school community. They are also in a position to humanize systems so that each student, family, and educator can access their potential.

## Oregon’s Shift to Transformative SEL

Schools often reflect the values and worldviews of the dominant culture; these in turn influence the behaviors of students and adults and the relationships and interactions between them (Milner, 2017). Historically, SEL has been based on white, middle-class, American values (Hoffman, 2009) with a focus on emotions as individual states separate from the influences of culture (Mesquita, 2022), the social inequities in society, or the climate of the learning environment. This has led to a focus on adult control and student compliance grounded in a belief that emotions need to be managed and interventions need to target issues that are within the child and not within their school environment or larger society (McCall et al., 2022). These traditional approaches to SEL have been used against students who are not members of the dominant culture as a way to reinforce the social, cultural, linguistic, and behavioral norms of the dominant culture (Allen et al., 2013; Jagers et al., 2019).

In order for SEL to be transformative, our policies, practices, and approaches will need intentional focus on how we create equitable learning environments that support students’ personal and collective well-being. This entails more than following a curriculum or adding a program, but actually embedding SEL approaches into every content area and school interaction throughout the day.

This includes a shift in systems and a commitment to using:

- **Integrated learning opportunities** that are modeled, nurtured, and practiced in every context.
- **Culturally responsive practices** that affirm and honor students’ ways of being, skill development in understanding cultural differences, and honoring students’ unique strengths, perspectives, and contributions.
- **Systemic approaches** that consider the role and impact of the broader society and the learning environment on students’ behavior and how this impacts the ways students view themselves.
- **Social justice** approaches that provide students with opportunities to reflect upon and understand the root cause of emotions related to our biases, stereotypes, prejudices, and discrimination.
- **Student agency and voice** (including non-verbal ways to communicate) become valued and necessary parts of the educational process, supporting students to take actions that challenge and change systems.

To fully actualize Transformative SEL in Oregon, there is a shift away from approaches limited to personal responsibility or student participation in a stand-alone curriculum. A Transformative

SEL approach focuses on developing the skills to participate, improve, and change institutions and systems in a way that promotes equitable outcomes (Jagers et al., 2019; Westheimer & Kahne, 2004).



**Figure 1** - The shift from personally responsible and participatory SEL to a Transformative SEL approach. (CASEL, n.d.)

## Oregon’s Transformative SEL Framework

Oregon’s Transformative SEL Framework utilizes the Collaborative for Academic Social and Emotional Learning (CASEL)’s definition of Transformative SEL. This approach extends SEL beyond personal development to help students and adults understand themselves in the context of a society, with all its inequities and possibilities for change. Oregon’s vision for Transformative SEL is built on this definition. Transformative SEL is about:

“Transformative Social Emotional Learning is a **process** whereby young people and adults build strong, respectful, and lasting, relationships that facilitate **co-learning** to **critically examine** root causes of inequity, and to develop **collaborative solutions** that lead to personal, community, and societal well-being” (CASEL, n.d.).

- **The process.** A transformative approach to SEL is not confined to a single person, lesson, or specific time of the day, or a one-size fits all program or curriculum. Instead, it’s an ongoing process and practice of how adults and students show up for one another. When Transformative SEL is embedded throughout the day, it has the potential to

humanize the learning environment by honoring students' and adults' lived realities of race, class, culture, and other intersectional identities.

- **Facilitating co-learning.** A transformative approach to SEL values how adults and students can learn with and from one another. When there is shared learning and decision-making, and when educators take a purposefully curious approach that is guided by the lived experiences and collective wisdom of the community, then student engagement, collaboration, and creative problem-solving thrives.
- **Critically examining root causes of inequity.** A transformative approach to SEL provides ways for adults and students to increase their awareness of the systems and structures that influence their attitudes, beliefs, behaviors and interactions. It empowers them to critique, challenge and change the systems that lead to inequities through civic action.
- **Developing collaborative solutions.** A transformative approach to SEL harnesses students' sense of agency through intentional partnerships that lead to improving systems and cultures in their schools and communities.

Oregon's Transformative SEL Framework depicts an ecosystem of four components that are interrelated to provide a holistic approach for supporting human growth, development and well-being: Guiding Principles, Conditions for Learning and Thriving, Adult Transformative SEL, and Student Transformative SEL. In nature, optimal growth and renewal requires a harmonious balance of environmental elements: sunshine, water, nutrients, a healthy atmosphere, and care come together to nurture plants to flower and bear fruit. Similar relationships exist in a school system where it is necessary to create, develop, and sustain an inclusive, affirming, and equitable learning environment where every student and adult can show up as their best, authentic self.

## Oregon's Transformative SEL Framework Components

Oregon's SEL Framework is grounded by four components that are essential to creating an ecosystem for Transformative SEL to thrive in classrooms, schools, and communities:

1. **Guiding Principles:** Serve as the foundational values and beliefs that are woven throughout the framework to guide decisions about how the Transformative SEL Standards are implemented.
2. **Conditions for Learning & Thriving:** Describes how partnerships, policies, and practices cultivate an ecosystem of Transformative SEL.
3. **Adult Transformative SEL:** Focuses on improving adult well-being, creating a positive work environment, and increasing competence so that adults can teach, model, coach, and nurture SEL with their students.
4. **Student Transformative SEL:** Fosters opportunities for students to develop and practice their knowledge, skills, habits, and dispositions. Oregon's Transformative SEL Standards are a pathway to nurturing Student SEL.

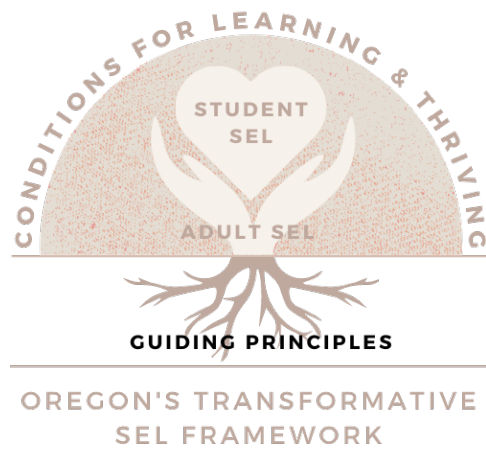


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**Figure 2** - Oregon Transformative SEL Framework: The structure, connection, and relationship of the 4 components: Guiding Principles, Conditions for Learning and Thriving, Adult Transformative SEL, and

All of the components are necessary to support the success of Transformative SEL in schools and districts. Each component intentionally complements and reinforces the others in a reciprocal and dynamic way.

## Component 1: Guiding Principles



*What are the foundational values and beliefs that will inform and guide decisions about how the Transformative SEL Standards are implemented and supported?*

Oregon has taken an intentional approach to Transformative SEL that engages the entire school community (students, families & caregivers, educators, and community partners) and is anchored in five guiding principles that are foundational when implementing Transformative SEL. The Guiding Principles are vital in an SEL ecosystem as they are the values that will help guide decision-making and successful implementation of Transformative SEL.

**The following Guiding Principles are dynamic, interdependent, and critical for successfully implementing Transformative SEL:**



### Culturally Responsive

A culturally responsive approach to Transformative SEL means the implicit recognition and incorporation of the cultural knowledge, experience, and ways of being and knowing of students in teaching, learning, and assessment. This includes identifying, valuing, and maintaining a high commitment to students’ cultural assets in instruction and assessment, as well as their diverse frames of reference that correspond to multifaceted cultural perspectives/experiences, and finally the classroom behaviors which can differ from White-centered cultural views of what qualifies as achievement or success. **This means creating a climate that values and integrates linguistic and cultural ways of knowing and being so all students feel seen, affirmed, and valued.**



### Community Responsive

A community responsive approach to Transformative SEL centers a community’s context and variety of lived experiences. It is inherently mindful of what writer Chimamanda Ngoza Adichie (TED, 2009) describes as, “The Danger of a Single Story,” which contributes to generalizations and assumptions about focal groups wherein culture is often conflated with and essentialized around race. Community refers to the cultural, political, social, spiritual, and economic spaces and places that shape student, staff, and family

realities. **A community responsive approach to Transformative SEL is equity-centered and, by default, culturally responsive and grounded in the particular needs and interests of the community it serves.**



### Strengths-Based

A strengths-based approach to Transformative SEL affirms all forms of identities and abilities through honoring individual and community backgrounds such as race, culture, language, lived experiences and equity in access to education for students experiencing disabilities. A strengths-based approach focuses on individual and systemic protective factors that enhance and promote health and well-being rather than emphasizing what is not working or needs to be “fixed.” Using a strengths-based approach does not focus on identifying and remedying problems, or on attempts to fix kids, because such approaches imply that kids are broken. Instead, a strengths-based approach addresses the conditions, systems, and structures that can harm students (Venet, 2021). **This means showing unconditional positive regard and high expectations for students through scaffolded support, relationship-building, compassionate communication, and community-building.**



### Trauma-Informed

A trauma-informed approach to Transformative SEL recognizes that all forms of oppression cause traumatic stress and that relationships, when navigated with care, can mitigate harm and maximize opportunities for individual and collective healing and wellness. Trauma-informed principles and care practices recognize behavior as communication and coping; they seek to understand the *why* behind behaviors. It also recognizes that individuals are not defined by their traumatic experiences or responses to them: people are more than the trauma they have experienced. **Predictable, consistent, positive, and healthy social and physical environments and relationships help our brains learn, develop, and grow by strengthening neural pathways that regulate our nervous systems and prime our brains, minds, and bodies for regulation and new learning** (Perry, 2009; Hammond, 2015; Hansen, 2018; Burke Harris, 2018).



### Grounded in Neuroscience and the Science of Learning

**A neuroscience approach to Transformative SEL ensures structures, policies, programs, practices, interactions, and physical learning environments are informed by and align with the most up-to-date learning and unlearning** (e.g., neuromyths) in Mind, Brain, & Education (MBE) science. MBE is the field that brings together neuroscience, psychology, and education. Examples include, but are not limited to, understanding:

a) how the brain's neuroplasticity facilitates all learning, unlearning, relearning, growth, and healing (Dweck, 2006, 2016; Hansen, 2018; Tokuhamas-Espinosa, 2018; Boaler, 2019). This is the process of how the brain continuously adapts, grows, rewires, and reorganizes during learning.

b) how neurodiversity acknowledges that every human brain is different and unique in order to help us appreciate and respect our differences and human potential (Armstrong, 2010; Prat, 2022; Ellis, Kirby, & Osborne, 2023).

c) how the prevalence of neuromyths (the misunderstandings or misconceptions about the brain and how it functions) can cause harm and limit human potential, recognizing that educators' beliefs in neuromyths are "...one of the greatest, if not *the* greatest, barriers to improving education" according to *MBE* experts (Tokuhamas-Espinosa, 2018).

## Component 2: Conditions for Learning & Thriving



*How might we intentionally humanize systems, policies, and practices to support Transformative SEL?*

To support, implement, and facilitate Transformative SEL across the educational ecosystem, it is essential to create conditions for learning and thriving across social contexts, systems, and learning environments. A Transformative SEL approach moves away from focusing on student deficits, and moves towards the changes that need to happen within the school and district environment itself. Creating equitable environments where students and adults can learn and thrive means creating intentional

alignment across partnerships, policies, and practices. Designing a Transformative SEL Framework for Oregon that serves everyone within and across the education system means it is the responsibility of everyone in the system.

SEL is critical to learning, to human connection, and to creating caring, just, inclusive, and healthy schools. In Alex Venet’s book, *Equity-Centered Trauma Informed Education* (2021), she suggests that schools need to understand how inequity causes harm and examine how the conditions within schools “cause, exacerbate, or perpetuate or trauma” (Venet, 2021, p. xviii). Her research advocates for shifting away from solely addressing the impact of trauma in students to addressing the causes of trauma by finding solutions in transformed structures and systems. A comprehensive SEL framework encompasses changes on the levels of school policy and culture, recognizing that student actions and attitudes are influenced by their contexts and not their individual choices alone.

“SEL is understanding the environment around you and your own emotions, and how to deal with it and help others.”  
- Oregon Student

This quotation comes from student engagement with the Oregon Health Authority Statewide Youth Health Council and Youth Era.

SEL instruction that focuses solely on individual students, and not the social systems around them, can in fact exacerbate inequities and cause further harm to students. For these reasons, it is critical for us to “[e]xamine and interrogate how SEL frameworks have been weaponized against Black and Brown young people in schools,” and “[i]dentify if there are ways that SEL might be used in [the] classroom, school, or workplace with punitive and disciplinary measures,”

notes the Communities for Just Schools Fund (2020, p. 48). In order to mitigate these inequities and injustices, a Transformative SEL approach that is comprehensive and systemic can enact changes at the district and school culture and policy level by recognizing that student actions and attitudes are influenced by their contexts and not their individual choices alone.

To intentionally focus on historically and currently underserved communities, ODE's culturally specific [Student Success Plans](#) were reviewed and analyzed to help identify the essential elements that would support a Transformative approach to SEL. Three themes emerged as systemic approaches to promote the necessary conditions for learning and thriving where every students' social, emotional, and academic needs can be met: cultivate authentic partnerships; adopt equitable practices; and create thriving learning environments.

### Cultivate Authentic Partnerships

Transformative SEL can help address various forms of inequity and empower students and adults to co-create thriving schools. Students, families/caregivers, community organizations and schools learn together to create a dynamic, mutually reinforcing, and an ever-changing environment that supports the development and maintenance of healthy school communities. School communities benefit when there are two-way communication channels, shared decision-making, and a commitment to being responsive to the needs and aspirations of students and adults in the education system. Identifying power dynamics, creating trusting relationships and co-constructing an environment that cultivates community health and well-being is essential to the conditions where students, families, and school staff can thrive.

### Adopt Equitable Policies

To lead transformational change in district and school systems, leaders can create policies that prioritize student and adult safety, belonging, agency, and well-being. This means addressing key policy areas that impact employment practices, diversity in candidates, and retention efforts. It is important to create discipline policies which support practices that meet student needs, help repair harm, promote community healing, and collaborate on problem-solving to honor a sense of connectedness and belonging to the school community. Continuous improvement efforts that incorporate routine engagement and involvement, disaggregated data collection, and root cause analysis, can support policies that improve learning environments and practices that are humanizing, and healing.

### Create Thriving Learning Environments

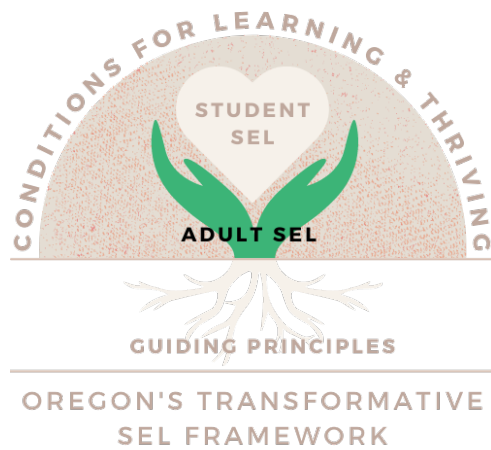
It's important to consider how students and adults experience learning in order to create meaningful environments, engaging learning opportunities, and nurturing relationships where

every person can thrive. In a Transformative SEL approach, adults build community and facilitate routines and rituals that promote healing and belonging. In these environments, students have opportunities for reflection, input and feedback about their learning experiences in classrooms and schools that support their sense of agency and affirm their personal, cultural, racial and academic identities. If students and adults work together to co-construct the classroom and school community, where everyone's stories, cultures, history and voices are represented, then everyone is empowered to create an equitable learning environment where all can thrive.

"It's the environment that matters."  
- Oregon Student

This quotation comes from student engagement with the Oregon Health Authority Statewide Youth Health Council and Youth Era.

## Component 3: Adult Transformative SEL



*What resources, supports, and conditions do adults need to nurture their own well-being while teaching, modeling, coaching, and nurturing student Transformative SEL?*

Adult beliefs, mindsets, and behaviors are essential preconditions for achieving equitable student outcomes. Implementing Transformative SEL includes prioritizing adult learning, critical reflection, ongoing support, and robust resources that nurture transformative communities of practice.

### Prioritize Adult SEL & Well-being

Regulated adults help students better regulate themselves. People co-regulate using mirroring neurons to attune to people around us (Blaustein & Kinniburgh, 2018; Perry, 2019). The same mechanisms that support student learning also support adult well-being. Focusing on the social and emotional competence of adults can improve adult well-being, create positive work environments, increase feelings of competence, and support adults in embodying, modeling, coaching, and nurturing Transformative SEL for students. The Transformative SEL Standards are created in a way that they can be used to support adult reflection, growth and development.

Transformative SEL centers our shared humanity and seeks to be responsive instead of trying to fix everything. It is an ongoing practice that helps us navigate life's complex pathways and transform systems to be more humanizing. District and school level actions that support a culture of well-being include providing structures for adult connection, collaboration, and self/community-care. When the educational system intentionally strives for equity and provides educators with social and emotional support (i.e., affinity groups, opportunities to pause and reflect, 1:1 check-ins, wrap-around services, trust and autonomy to build agency) this can reduce feelings of isolation, demoralization, burnout, compassion fatigue and vicarious trauma.

### Embed Transformative SEL Standards & Practices

Professional learning opportunities should prioritize the role Transformative SEL plays in day-to-day functioning and how it impacts interactions, relationships, behaviors, and equitable learning environments for students and adults. Integrating Oregon's Transformative SEL Standards and

practices at the district and building-level creates structures and routines in different spaces (e.g., Professional Learning Communities/Data Teams, Student Intervention Teams/Student Support Teams, Site Councils, Parent Teacher Association meetings, Parent-Teacher Conferences, Hiring Practices, etc.) that support intentional relationship-building and deepen a sense of community and collaboration to humanize our processes and ways of being with each other.

### Build on Oregon’s Transformative SEL Standards in Educator Preparation Programs

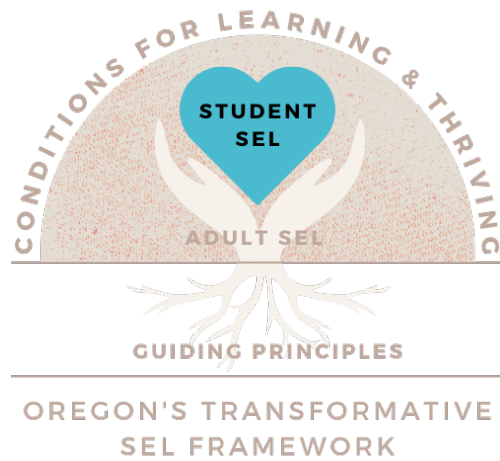
School districts can support and enhance pre-service teachers’ understanding of Transformative SEL by ensuring cooperating teachers and mentors are also supported in their Transformative SEL development. Transformative SEL informs the deep school systems to support this learning and implementation for the newest professionals.

As of 2023, pre-service teachers participating in an Oregon educator preparation program are introduced to Transformative SEL through modeled and embedded competencies within their coursework. Every educator preparation program in Oregon is required to align their program to [OAR 584-410-0075 Social and Emotional Development to Promote Equity](#). A guide to these standards can be found on the [TSPC Website](#)

“SEL is the idea of learning how to “human” (for lack of a better way to phrase it) by example from your teachers and other school staff, because you don’t ever stop developing your brain.”  
-Oregon student

This quotation comes from student engagement with the Oregon Health Authority Statewide Youth Health Council and Youth Era.

## Component 4: Student Transformative SEL



*What do students need to know and be able to do to develop and grow in their Transformative SEL?*

Student Transformative SEL is intentionally nested within the other components of the framework because student success rests upon the local school’s commitment to all four interconnected components. Student Transformative SEL relies upon learning environments that embody the guiding principles, cultivating Transformative SEL for adults, and creating equitable conditions for learning and thriving within classrooms, schools, and across the educational experience.

Oregon’s Transformative SEL Standards support local schools in ensuring Student Transformative SEL. The five standards were developed by braiding CASEL’s descriptors for each of the five competencies (Self-Awareness, Self-Management, Social Awareness, Relationship Skills, and Responsible Decision-Making) with the five transformative SEL focal constructs (Identity, Agency, Belonging, Collaborative Problem-Solving, and Curiosity) as shown in Figure 3.



**Figure 3** - CASEL’s Five SEL Competencies Braided with CASEL’s Five SEL Transformative Focal Constructs.

The five standards include a combination of competencies, processes, dispositions, skills, and abilities that help students understand, prevent or mitigate toxic stress, trauma, and its impacts. They also provide

guidance for adults about what to consider when creating equitable environments where every student can learn and thrive.

## Integrated Approach

SEL approaches not only provide benefits to a student’s social emotional skills, but these approaches also provide benefits to student academic success. While there have been several studies on this topic, one of the largest studies was a 2011 meta-analysis that reviewed findings from 213 school-based SEL programs and involved over 270,00 students in total (Durlak et al., 2011). One of the key findings from that meta-analysis was that compared to the control groups, the students who participated in SEL “...demonstrated significantly improved social and emotional skills, attitudes, behavior, and academic performance that reflected an 11-percentile-point gain in achievement” (Durlak et al., 2011, p. 405). Additionally, strong SEL abilities are associated with long-term outcomes such as increased graduation rates, greater college completion, and ability to obtain stable employment (Jones et al., 2015). It is clear that relationships and context matter, as evidence continues to show that supporting SEL in the academic context improves learning.

“Schools seem to be more focused on what they are teaching rather than who they are teaching.”  
- Oregon Student

This quotation comes from student engagement with the Oregon Health Authority Statewide Youth Health Council and Youth Era.

Oregon’s Transformative SEL Standards, with related practices and growth indicators, find balance between being broad enough to be flexible and specific enough to be useful for adults and students across all contexts. They can be useful when explicitly presented and discussed, when integrated across curricula and school/community processes, when implemented universally with students, and when utilized with expanded methods of support for students with diverse learning or instructional needs. While the standards are developed for students, Oregon’s Transformative SEL Standards are life-long and essential employability skills that do not end after 12th grade. Adults can use the Transformative SEL standards to design learning environments and opportunities for students, as well as to embody, model, teach, and coach the standards.

## Developmentally and Culturally Responsive

All students should be able to access the standards, regardless of where they are in their Transformative SEL development. This includes understanding that stress, toxic stress and traumatic stress (racism, oppression, and microaggressions are forms of toxic stress and trauma) can impact students’ SEL. To be culturally responsive while meeting the standards and benchmarks, additional indicators may need to be included and adapted to be responsive to individual learning contexts, cultures, populations of students, and communities.

Oregon’s Transformative SEL Standards consider the developmental progression of students. The National Association for the Education of Young Children describes this concept as follows:

Building on each child’s strengths—and taking care not to harm any aspect of each child’s physical, cognitive, social, or emotional well-being—educators design and implement learning environments to help all children achieve their full potential across all domains of development and all content areas. Developmentally appropriate practice recognizes and supports each individual as a valued learning community member. As a result, to be developmentally appropriate, practices must also be culturally, linguistically, and ability appropriate for each child. (NAEYC, n.d.)

Oregon’s Transformative SEL Standards were created with this definition and lens in mind so that there is flexibility in being responsive to students’ strengths and needs. The standards are written in such a way that depending on any given moment, or within any context or environment, everyone can show up differently along the progression. **For this reason, the standards are intentionally not written in grade bands, as this may contradict developmentally appropriate practices.**

## Role of Curriculum and Assessment

Oregon’s Transformative SEL Standards support educational equity in multiple ways, such as promoting whole-child development, elevating the social and interconnected nature of learning, advancing the belief that all children can learn, developing young people’s skills to navigate across social contexts, and providing ways to improve relationships between students and adults.

Oregon’s Transformative SEL Standards are not a way to test or identify student deficits, and they are not a one-size-fits-all curriculum or an additional program that is added on top of everything else. Rather, the intention of Oregon’s Transformative SEL Standards is to provide an intentional approach that builds on student assets, creates a sense of belonging, and

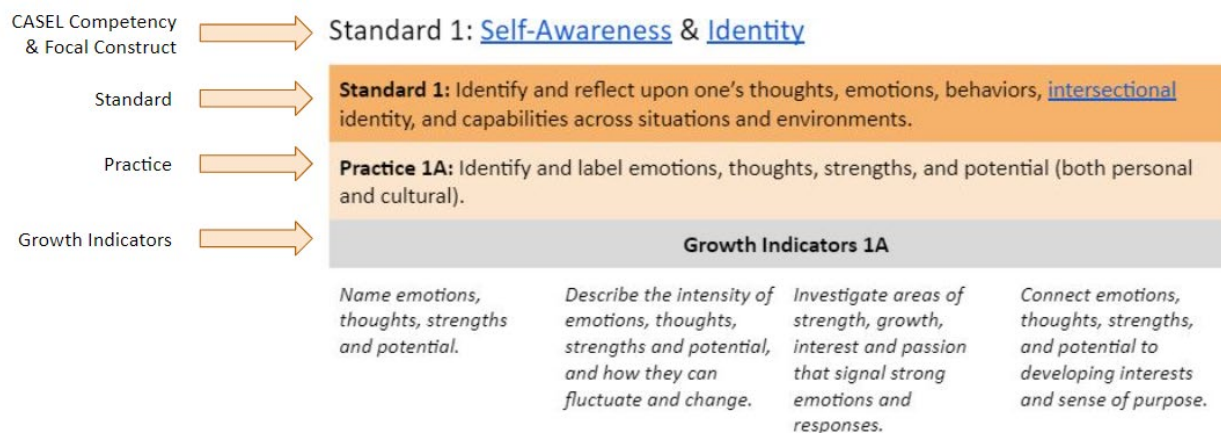
develops agency and identity. The standards are not meant to decide appropriate behavior or as a means for identifying, tracking, or excluding students in ways that have historically led to disproportionate outcomes for students. In partnership with families and caregivers, the standards provide ongoing formative opportunities for reciprocal feedback that includes dialogue, reflection, goal-setting and increasing individual and collective awareness and growth.



# **Oregon's Transformative Social and Emotional Learning Standards**

## Standards, Practices and Growth Indicators

While HB 2166 (2021) required ODE to create student standards, in order to fully actualize Transformative SEL, there is equal emphasis on creating supportive conditions and practices to optimize learning and growth of all individuals within the educational system. The approach taken to these standards involves both individual and communal practices that cultivate and nurture Transformative SEL across the system. The standards, practices, and growth indicators start with verbs so that the phrase, “I can...” and “We can...” could be used individually and collectively, as aspirational for a learning community. This honors cultural backgrounds, collectivist values, and the belief that throughout life, everyone is continuously developing and practicing their social and emotional skills. This values everyone in the educational system as responsible for creating the conditions and the opportunities to model, teach, coach, and practice Transformative SEL.



**Figure 4 - Elements of Oregon’s Transformative SEL Standards**

Oregon’s Transformative SEL Standards describe what a person needs to know, understand, and be able to do when it comes to Transformative SEL. Each standard includes 3-4 practices that demonstrate progression towards meeting the standard with more focused knowledge and skill. Each practice also includes a set of four growth indicators organized by Webb’s Depth of Knowledge (Webb, 1997, 1999), providing guidance on what these may look like in action and indicate growth towards the practice and standard. The growth indicators are also intended to help guide adults in making decisions about what learning opportunities are most appropriate for use with individual students and the learning community as they learn, practice, and reflect on how they are making progress towards the standards. The growth indicators serve as a useful guide for implementation and are an optional resource.

## Standard 1: [Self-Awareness](#) & [Identity](#)

**Standard 1:** Identify and reflect upon one’s thoughts, emotions, behaviors, [intersectional](#) identity, and capabilities across situations and environments.

**Practice 1A:** Identify and label emotions, thoughts, strengths, and potential (both personal and cultural).

### Growth Indicators 1A

*Name emotions, thoughts, strengths and potential.*

*Describe the intensity of emotions, thoughts, strengths and potential, and how they can fluctuate and change.*

*Investigate areas of strength, growth, interest and passion that signal strong emotions and responses.*

*Connect emotions, thoughts, strengths, and potential to developing interests and sense of purpose.*

**Practice 1B:** Understand the stress response system ([regulation](#) and [dysregulation](#)) and what environments and experiences activate those responses.

### Growth Indicators 1B

*Identify physiological cues related to the stress response system and what they look like, feel like, and sound like.*

*Interpret environmental and experiential cues for dysregulation that activate the stress response system, and what environments or experiences support regulation.*

*Draw conclusions about what stress response state that one is experiencing based on the identified cues.*

*Apply concepts of the stress response system to identify tools to help regulate across situations and environments.*

**Practice 1C:** Reflect on and evaluate how one’s emotions, thoughts, and perspectives (including values, biases, and prejudices) can influence behavior.

### Growth Indicators 1C

*Identify one’s emotions, thoughts, perspectives, and behaviors.*

*Infer causes of one’s emotions, thoughts, perspectives, and behaviors.*

*Assess consequences of behaviors based on one’s emotions, thoughts, and perspectives.*

*Analyze patterns of behavior based on one’s emotions, thoughts, and perspectives over time.*

**Practice 1D:** Analyze personal and social intersectional identities and [positionality](#), and how they relate to one's interests, purpose, and sense of belonging.

### Growth Indicators 1D

*Define and ask questions about one’s personal and social intersectional identity and positionality.*

*Describe one’s personal and social intersectional identity and positionality.*

*Assess one’s personal assets related to intersectional identity and how they relate to a sense of purpose.*

*Analyze how one’s intersectional identity impacts the perspectives of self and others, and how this is connected to one’s sense of belonging.*

## Standard 2: [Self-Management](#) & [Agency](#)

**Standard 2:** Use management strategies to build personal and collective agency that lead to achieving goals and aspirations.

**Practices 2A:** Manage and express thoughts, emotions, impulses, and stressors in ways that affirm one’s identity.

### Growth Indicators 2A

<i>Notice and label thoughts, emotions, impulses, and stressors.</i>	<i>Recognize the cause and effect relationship of expressing thoughts, emotions, impulses, and stressors across situations and environments.</i>	<i>Compare and utilize different strategies and skills to manage and express thoughts, emotions, impulses, and stressors.</i>	<i>Analyze thoughts, emotions, impulses, and stressors, how they are internalized and externalized, and the impact these have on oneself and others.</i>
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**Practices 2B:** Use management strategies while recognizing that various situations and environments may require different approaches for achieving personal and collective goals and aspirations in ways that affirm one’s identity.

### Growth Indicators 2B

<i>Name a variety of management strategies and skills.</i>	<i>Identify which management strategy to use across situations and environments.</i>	<i>Assess how the management strategies were used across situations and environments.</i>	<i>Analyze how management strategies and skills impact oneself, others, and the community.</i>
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**Practices 2C:** Plan, evaluate, and achieve personal and collective goals and aspirations.

### Growth Indicators 2C

<i>Identify personal and collective goals and aspirations.</i>	<i>Construct a plan to meet personal and collective goals and aspirations.</i>	<i>Assess and evaluate one’s actions to achieve personal and collective goals and aspirations.</i>	<i>Analyze the impact of achieving personal and collective goals and aspirations and make adjustments as necessary.</i>
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**Practices 2D:** Develop personal and collective agency by using various forms of communication (i.e. verbal, body language, written, etc.) to make choices and take initiative.

### Growth Indicators 2D

<i>Define personal and collective agency, and name the skills needed in order to take initiative.</i>	<i>Apply personal and collective agency by showing courage and taking initiative.</i>	<i>Assess the impact of personal and collective agency while identifying barriers that contribute to or restrict agency.</i>	<i>Critique and remove barriers that restrict personal and collective agency.</i>
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## Standard 3: [Social-Awareness](#) & [Belonging](#)

**Standard 3:** Develop social awareness that fosters a sense of belonging and leads to co-constructing equitable, thriving communities and a vibrant society.

**Practice 3A:** Demonstrate awareness and understanding of the similarities and differences that define, influence, and affirm personal and collective identities.

### Growth Indicators 3A

*Recognize and identify factors that define and influence personal and collective identities.*

*Distinguish between similarities and differences that define and influence personal and collective identities.*

*Formulate and assess strategies used to affirm personal and collective identities.*

*Analyze and critique why factors influence personal and collective identities.*

**Practice 3B:** Apply social skills (i.e., empathy, compassion, etc.) to develop and maintain healthy relationships that collectively achieve mutual goals while affirming identities and perspectives.

### Growth Indicators 3B

*Identify the social skills necessary for healthy relationships and achieving goals.*

*Recognize in oneself and others how social skills affect relationships and achieving goals.*

*Use social skills to collectively achieve mutual goals that affirm identities and perspectives.*

*Analyze and critique the health of relationships and whether they affirm identities and perspectives.*

**Practice 3C:** Foster a sense of belonging that cultivates acceptance, support, inclusion, and encouragement of others within a diverse community, while addressing the impact of systemic injustices across situations and environments.

### Growth Indicators 3C

*Identify and define the qualities of belonging within a diverse community.*

*Distinguish how systemic injustices across situations and environments affect a sense of belonging.*

*Demonstrate qualities that foster a sense of belonging in a diverse community.*

*Evaluate how one’s responses to situations and environments can impact systemic injustices and foster a sense of belonging.*

## Standard 4: [Relationship Skills](#) & [Collaborative Problem-Solving](#)

**Standard 4:** Establish and maintain healthy, supportive relationships and effectively navigate diverse settings in order to collaboratively solve problems.

**Practice 4A:** Form authentic relationships that encourage autonomy while building cultural awareness and empathy through various forms of communication.

### Growth Indicators 4A

<i>Identify how backgrounds can be similar and different and recognize that people may experience situations differently.</i>	<i>Use strategies for accepting, respecting, and supporting similarities and differences between oneself and others.</i>	<i>Assess communication skills to highlight the personal strengths and unique contributions of relationships with others.</i>	<i>Demonstrate empathy through various forms of communication to work collaboratively with others.</i>
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**Practice 4B:** Demonstrate empathy and affirm other’s perspectives during teamwork and collaborative problem solving.

### Growth Indicators 4B

<i>Understand the needs and emotions of others, and identify ways others are similar and different from oneself.</i>	<i>Recognize how to respond to the various social, verbal, physical, and situational cues of others while practicing personal and collective agency.</i>	<i>Adapt strategies for accepting, respecting, and supporting similarities and differences between oneself and others.</i>	<i>Connect how one’s communication and cultural identity influence perspectives and how it might differ from others.</i>
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**Practice 4C:** Recognize and acknowledge when there is harm to self and others and identify when support, agency, and practices to repair and restore are needed.

### Growth Indicators 4C

<i>Identify when someone is experiencing harm or when there is a conflict that needs to be resolved.</i>	<i>Recognize when a conflict is able to be resolved between peers and when to seek outside support.</i>	<i>Repair and restore relationships with individuals and to communities where harm has occurred.</i>	<i>Reflect on participation in practices that repair and restore harm to individuals or community groups.</i>
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**Practice 4D:** Restore relationships through actively engaging with others, working collaboratively, and affirming cultural and social perspectives.

### Growth Indicators 4D

<i>Identify ways to solve a problem that is culturally sensitive to the perspective of those involved.</i>	<i>Use collaborative problem solving skills to resolve conflict in a way that is culturally responsive to those involved.</i>	<i>Understand the context and perspective from which others are making decisions and actively use collaborative approaches to problem solving.</i>	<i>Analyze the impact of working together to strengthen relationships by affirming cultural and social perspectives.</i>
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## Standard 5: [Responsible Decision-Making](#) & [Curiosity](#)

**Standard 5:** Demonstrate [curiosity](#) and analysis of oneself and society in order to make caring choices that impact personal, social, and collective well-being across situations and environments.

**Practice 5A:** Demonstrate curiosity and open-mindedness while using critical thinking skills across various situations and environments.

### Growth Indicators 5A

*Define and recognize curiosity, open-mindedness, and critical thinking.*

*Show, interpret, and make observations of curiosity, open-mindedness, and critical thinking across situations and environments.*

*Develop, explain and investigate opportunities to be curious, open-minded, and think critically across situations and environments.*

*Apply the concepts of curiosity, open-mindedness, and critical thinking to make choices and understand the impact across situations and environments.*

**Practice 5B:** Make informed choices and identify solutions for personal and social injustices after analyzing all types of information.

### Growth Indicators 5B

*Use information, data, and/or facts to define, and recognize choices and solutions for personal and social injustices.*

*Interpret, and make observations about information, data, and/or facts to construct choices and solutions for personal and social injustices.*

*Cite information, data, and/or facts to develop informed choices and solutions for personal and social problems.*

*Design solutions for personal and social injustices based on information, data, and/or facts, and analyze the impact of choices.*

**Practice 5C:** Anticipate, reflect and evaluate the impacts of one’s choices and contributions in promoting personal, family, and community well-being.

### Growth Indicators 5C

*Identify, define and recognize choices and contributions in promoting personal, family, and community well-being.*

*Make observations and show how choices and contributions promote personal, family, and community well-being.*

*Anticipate and explain how choices and contributions promote personal, family, and community well-being.*

*Reflect and evaluate the impact of choices and contributions in promoting personal, family, and community well-being.*

## Appendices

### Transformative SEL Standards Glossary

#### Agency

Agency confers the wherewithal to impact positively on this psychological and social reality. It reflects hope and self-direction. Agency is focal among self-management competencies and signifies perceived and actual capacity to effect change through purposeful action. This may include having a voice and making choices about learning and career goals, overcoming personal challenges, and engaging in collaborative problem solving. Agency is key to young adults' success, allowing them to take intentional actions to shape the course of their lives. Agency also includes collective efficacy, which has been shown to improve teachers' abilities to improve school outcomes for students from under-resourced communities and to increase coordinated actions among adolescents and adults that contribute positively to civic life (CASEL, n.d.).

#### Belonging

Belonging suggests the sense of connectedness and trust needed to engage in co-constructing an equitable, thriving local community and vibrant civil society. It enhances self-worth. Belonging is focal among social awareness competencies and connotes experiences of acceptance, respect, and inclusion within a group or community. It implies not only feeling recognized but also being fully involved in relationship-building and co-creating learning spaces. Having a

sense of belonging is critical to students' and adults' cognitive, social, and emotional well-being, as well as school and work satisfaction and academic motivation and achievement (CASEL, n.d.).

#### Collaborative Problem-Solving

Collaborative problem-solving (not the Collaborative Problem Solving program) acknowledges and helps realize the collective rights and responsibilities of full citizenship in local, national, and global community contexts. It is a critical feature of efforts to pursue equity and excellence. Collaborative problem-solving is focal among relationship skills' competencies and reflects a complex skill set in high demand in our increasingly multifaceted local, national, and global contexts. Distinct from collaborative learning and collaborative decision-making, collaborative problem-solving is defined as the capacity of an individual to effectively engage in a process whereby two or more people attempt to solve a problem by sharing the understanding and effort required to come to a solution and pooling their knowledge, skills, and efforts to reach that solution (CASEL, n.d.).

#### Curiosity

Curiosity reflects the deep need to continuously surface and curate information about oneself in relation to others and the physical world. It prioritizes informed decision-making based on

open-minded investigation that sparks self-development and careful social analysis. Curiosity is focal among responsible decision-making competencies and can animate critical self- and social-analysis and action. Curiosity has both cognitive and affective elements that contribute to an enduring tendency to pursue knowledge and new experiences. As such, it appears to be essential to attention, engagement, and learning (CASEL, n.d.).

#### Dysregulation

Patterns of emotional experience or expression that interfere with goal directed activity (Thompson, 2019).

#### Identity(ies)

Identity implies understandings and sensibilities associated with multifaceted personal and social group statuses (often discussed in terms of intersectionality and positionality). Identity is focal among self-awareness competencies and refers to how students (and adults) view themselves. Identity can also be attributed onto others without consent or choice due to positionality, perception, and biases. Identity has many dimensions which intersect and influence one another (e.g., race/ethnicity, socioeconomic status, gender identity, sexual orientation, disability, language, religion, values, interests, etc.), with each dimension having a level of importance and emotional tenor that may change over time in accordance with access to

## Oregon’s Transformative SEL Framework and Standards

supportive, affirming, and culturally sustaining communities and treatment by others. Having a healthy sense of identity is important developmentally across the lifespan because it buffers against negative or traumatic experiences (e.g., stereotype threat or discrimination) and when supported and affirmed, contributes to positive academic, social, mental health, and emotional outcomes (adapted from CASEL, n.d.).

### Intersectionality

The complex, cumulative way in which the effects of multiple forms of discrimination (such as racism, sexism, and classism) combine, overlap, or intersect, especially in the experiences of marginalized individuals or groups. Kimberlé Crenshaw introduced the theory of intersectionality, the idea that when it comes to thinking about how inequalities persist, categories like gender, race, and class are best understood as overlapping and mutually constitutive rather than isolated and distinct (Merriam-Webster, n.d.).

### Positionality

Positionality refers to how differences in social position and power shape identities and access in society. This affects teaching, learning, leading, and common interactions (Adapted from

[University of British Columbia’s Center for Teaching and Learning](#), n.d.).

### Regulation

Generally used to describe a person’s ability to effectively manage and respond to an emotional experience ([Cornell Research Program on Self Injury and Recovery](#), n.d.).

### Relationship Skills

Relationship skills are the abilities to establish and maintain healthy and supportive relationships and to effectively navigate settings with diverse individuals and groups. This includes the capacities to communicate clearly, listen actively, cooperate, work collaboratively to problem solve and negotiate conflict constructively, navigate settings with differing social and cultural demands and opportunities, provide leadership, and seek or offer help when needed (CASEL, n.d.).

### Responsible Decision-Making

The abilities to make caring and constructive choices about personal behavior and social interactions across diverse situations is known as responsible decision-making. This includes the capacity to consider ethical standards and safety concerns, and to evaluate

the benefits and consequences of various actions for personal, social, and collective well-being (CASEL, n.d.).

### Self-Awareness

Self-awareness centers around the ability to understand one’s own emotions, thoughts, and values and how they influence behavior across contexts. This includes the capacity to recognize one’s strengths and limitations with a well-grounded sense of confidence and purpose (CASEL, n.d.).

### Self-Management

Self-management is the ability to manage one’s emotions, thoughts, and behaviors effectively in different situations and to achieve goals and aspirations. This includes the capacity to delay gratification, manage stress, and feel motivation and agency to accomplish personal and collective goals (CASEL, n.d.).

### Social-Awareness

The ability to understand the perspectives of and empathize with others, including those from diverse backgrounds, cultures, and contexts is known as self-awareness. This includes the capacity to feel compassion for others, understand broader historical and social norms for behavior in different settings, and recognize family, school, and community resources and supports (CASEL, n.d.).

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# Oregon's Transformative Social Emotional Learning (SEL) Framework & Student Standards

2nd Read/Adoption

June 15, 2023

# Purpose

1. Final revisions to Oregon's Transformative SEL Framework & Standards
2. Recent data on the benefits of Social and Emotional Learning
3. Contributions to Oregon's SEL Framework & Standards

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# Final Revisions to Oregon's Transformative Framework & Standards

- Formatting
- Revised some of the wording
- Additional definitions in the glossary
- Expanded on concepts in Component 3:  
Transformative Adult SEL



# Recent Data on Benefits of Social & Emotional learning



- Improving students' academic achievement with higher levels of “school functioning”
- Contributing to healthy well-being and safe schools
- Developing skills that promote future readiness
- Demonstrating that focusing on educator social and emotional competence can also improve teacher well-being.

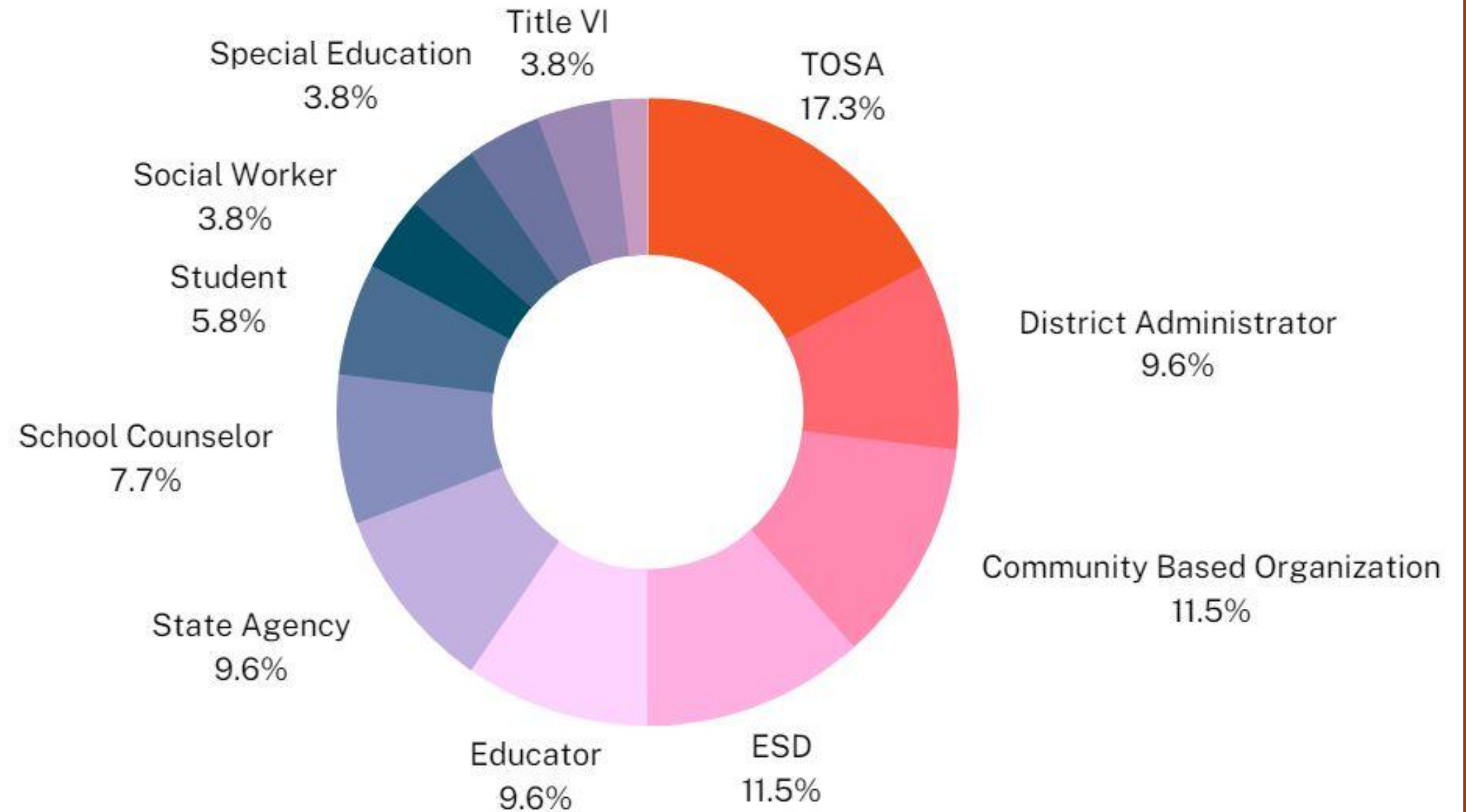


# Contributions to Oregon's SEL Framework and Standards

# Role Representation

**55** Advisory Group members

**90** Hours of meetings and work session

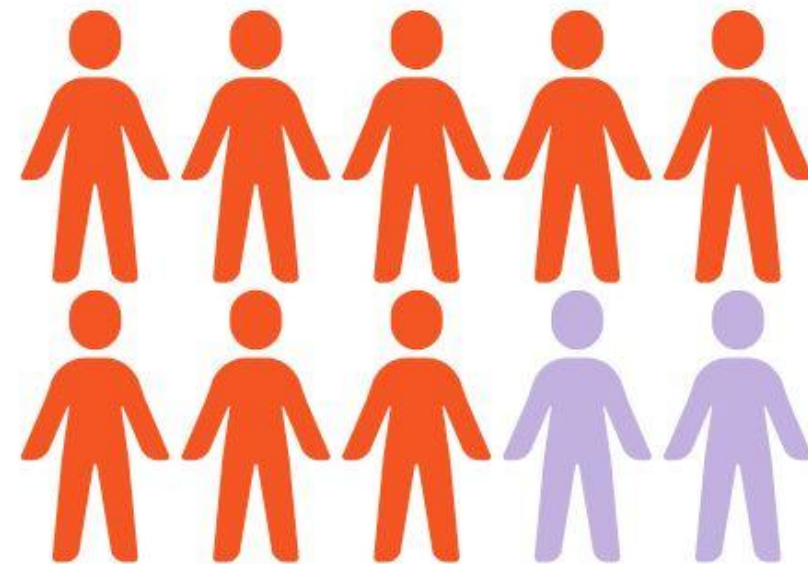




# Engagement

**17** Engagement sessions

**590** Respondents in statewide survey



**8 out of 10** Survey respondents **agreed/strongly agreed** teaching and/or using the standards with students in the classroom, school, district, and community.

# Gratitude







## **Resolution Protecting Schools from Gun Violence and Prioritizing Student Health**

**WHEREAS**, the Oregon State Board of Education has witnessed a 23% increase in gun violence across the nation between 2019 and 2021; and

**WHEREAS**, the Oregon State Board of Education has witnessed a 50% increase in the number of children and teens killed by gun violence across the nation between 2019 and 2021; and

**WHEREAS**, since 2020, gun violence has been the leading cause of death for children in this nation, surpassing car accidents, cancer, suffocation, and poisoning; and

**WHEREAS**, the Oregon State Board of Education has dedicated itself to sharing responsibility for the academic and lifelong success of every student in our state; and

**WHEREAS**, in an average year, 544 Oregonians are killed by gun violence, with over 80% lost to suicide; and

**WHEREAS**, since 1982, there have been at least 24 instances of gun violence affecting Oregon schools; and

**WHEREAS**, between 2017 and 2021, gun violence has taken the lives of 162 children in Oregon, with over 60% lost to suicide; and

**WHEREAS**, children, school employees, and families attend school in fear of gun violence, both within and outside the school setting; and

**WHEREAS**, the Oregon State Board of Education has committed to cooperation on joint priorities that promote student inclusion, safety, belonging, and holistic wellness in Oregon's school systems, and advocates for community engagement and a focus on equity when discussing safety in Oregon's school systems; and

**WHEREAS**, the Oregon State Board of Education believes that gun violence adversely affects the mental health and well-being of children, school employees, and families, often leading to increased rates of depression and anxiety; and

**WHEREAS**, every child, school employee, and family should be able to expect a safe school environment; and

**WHEREAS**, the Oregon State Legislature, the Governor, the Oregon Department of Education, the State Board of Education, the Oregon Health Authority and all other education agencies and agencies dedicated to a child's health and well-being have all declared their conviction to child wellness and safety through previous bills, laws, regulations, rules, and standards.

**THEREFORE BE IT RESOLVED** that the Oregon State Board of Education:

- (1) Calls upon the Oregon State Legislature, the Governor, and the Oregon Department of Education to take immediate actions to reduce gun violence in this state and protect the children, school employees, and families that participate in Oregon's school systems; and
- (2) Calls upon the Oregon State Legislature, the Governor, and the Oregon Department of Education to solicit and center the voices of students and school employees when considering the impacts of gun violence on Oregon's school systems; and
- (3) Urgently requests increased collaboration amongst state agencies that serve the health and education needs of Oregon's students and contribute to developing a welcoming, inclusive, and safe climate for Oregon's school systems, including the Oregon Department of Education and the Oregon Health Authority; and
- (4) Calls on the Oregon Department of Education, Oregon's 197 school districts, and Oregon's 19 Education Service Districts to collaboratively work together to ensure that each school has access to a culturally responsive, linguistically representative, gender and sexuality affirming, and anti-racist Behavioral Safety Assessment team, providing Behavioral Safety Assessments based on the full identity of each youth; and

(5) Urgently requests that these Behavior Safety Assessment teams enact practices and processes committed to transformative justice, trauma informed response, and mental health supports to meet the needs of the individual youth, their family, and their community in order to provide wrap around care and support to interrupt and end violence in our school; and

(6) Strongly supports efforts by the Oregon State Legislature to provide permanent funding for the School Safety and Emergency Management program, which allows the Oregon Department of Education to support the development and implementation of emergency operations plans in schools across the state.

<p><b>SUBJECT:</b> Oregon’s Graduation Requirements (OAR 581-022-2115)</p> <p><b>STAFF NAME &amp; OFFICE:</b> Dan Farley, Office of Research, Assessment, Data, Accountability, and Reporting</p> <p>ODE published two determinations and eight recommendations on graduation requirements on September 1, 2022, pursuant to the requirements established by <a href="#">Senate Bill 744</a>. Senate Bill 744 suspends the assessment of Essential Skills requirements for Oregon’s students through the 2023-24 school year. The legislature has not taken any action to address ODE’s recommendation to replace the assessment of essential skills requirement with an alternative accountability measure(s).</p> <p>This adoption presentation will ask the board to continue the extension of the suspension of the assessment of essential skills policy through the 2027-28 school year to allow for legislative and state board action. This requires another modification to OAR 581-022-2115.</p>	<p><b>Second Read</b></p> <p><b>Written Report</b></p>
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**BACKGROUND**

1. History:

October 2008: Oregon Administrative Rule ([OAR](#) 581-022-2115: *Assessment of Essential Skills*) states that, “school districts and public charter schools shall require students to demonstrate proficiency in the Essential Skills listed in Section 16(a)–(c)”. There are nine Essential Skills:

- 1) Read and comprehend a variety of test;**
- 2) Write clearly and accurately;**
- 3) Apply mathematics in a variety of settings;**
- 4) Listen actively and speak clearly and coherently;
- 5) Think critically and analytically;
- 6) Use technology to live, learn, and work;
- 7) Demonstrate civic and community engagement;
- 8) Demonstrate global literacy; and,

9) Demonstrate personal management and teamwork skills.

The initial design and intention of the nine Essential Skills is to require demonstrated proficiency in all areas. Since their implementation, however, the primary statewide focus has been around the first three Essential Skills. The remaining six have been evaluated locally; without statewide data there is little known or understood about student performance in these six domains at a systems level. The complete nine essential skills are rarely emphasized holistically, despite their importance of developing the whole child and ensuring that all Oregon students receive a well-rounded education.

OAR 581-022-2115 regulation states that students are required to demonstrate proficiency in the Essential Skills to receive a Regular or Modified Diploma. The State Board of Education has approved four categories of assessments by which students may demonstrate proficiency in the required Essential Skills:

1. Oregon Statewide Summative Assessment
2. Other Standardized Assessment\*
3. Work Samples (six required; two for writing, two for reading and two for mathematics)
4. Local Assessment Option

*\*Other Standardized Assessment Option recommendations are made through ODE and presented to the Assessment of Essential Skills Review Panel (AESRP). AESRP reviews and recommends additions or changes to the list of approved assessment options based, in part, on technical documentation for the assessment and on evaluating student score data. AESRP's recommendations are provided to the State Board of Education and must be adopted by the State Board of Education before they can be included as an approved assessment for the Essential Skills.*

Due to the COVID-19 pandemic, the U.S. Department of Education suspended all summative tests for schools in spring of 2020. In spring of 2021, Oregon requested a waiver from the federal government to substantially reduce the number of assessments students were required to take due again to the impact of the COVID-19 pandemic. Collectively, this meant that student's primary means of demonstrating proficiency in reading, writing, and mathematics were not consistently available to them and therefore the State Board of Education suspended the Assessment of Essential Skills for 2019-2020 and 2020-2021.

a. What prompted this update to the board?

During the 2021 Oregon Legislative Session the Oregon Legislative Assembly passed [SB 744](#) which directed the Oregon Department of Education to review state requirements for high school diploma options, as well as to review state requirements related to demonstrations of proficiency in Essential Skills. SB 744 applies to the assessment of Essential Skills requirements for receiving a Regular or Modified Diploma.

SB 744 required that a final report be submitted to the State Board and to the interim committees of the Legislative Assembly, with recommendations, by September 1, 2022. The report had to include:

“... an analysis of the effectiveness of requiring students to demonstrate proficiency in Essential Learning Skills and an explanation of the reasons the department concludes that requirements related to demonstrations of proficiency in Essential Learning Skills should be retained, modified

or eliminated. If the department concludes that demonstrations of proficiency of Essential Learning Skills should be retained, the department shall provide recommendations for alternative methods for students to demonstrate proficiency in skills or academic content areas that are not related to career and technical education.”

The [Community-Informed Recommendations for Equitable Graduation Outcomes](#) report was published on September 1, 2022. Recommendation five states the following, “Recommendation 5: Maintain focus on demonstrating 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.”

This update to the board is prompted by the need to ensure that students who are currently being served in Oregon’s education system are able to plan for any changes that might be made to Oregon’s graduation requirements. Students plan their high school courses well in advance in order to pursue their postsecondary goals and deserve to know what the requirements will be before they enter high school. There is also precedent set within the current OAR to this effect, wherein students were notified by March of their 8<sup>th</sup> grade year if changes to the assessment of essential skills approved tests were made.

## 2. Purpose

The purpose of this presentation is to provide a single, adoption read regarding the extension of the Assessment of Essential Skills through the 2026-27 school year.

### a. What function does this policy or update hold?

The policy under review at OAR 581-022-2115 establishes the assessment of essential skills graduation requirements. ODE is recommending that the State Board extend the suspension of the assessment of essential skills through the 2026-27 academic year. This will allow for students to be prepared for any changes to graduation requirements.

### i. How long has this policy in place?

The Oregon State Board of Education identified the Assessment of Essential Skills requirements in July 1, 2008.

## 3. Does the board have any areas of discretion on this policy and/or update?

The State Board established the historical rule that set the requirements at OAR 581-022-2115.

## 4. Education and Community Partners voice/input (individual and collective i.e., groups)

1. Who was involved in bringing this to the Board? The Oregon Department of Education brought this information to the Oregon State Board of Education to inform the board of legislative actions included in SB 744 and the direct and potential impacts on board decision making.
2. What did engagement in this process entail? The Oregon Legislature held public comment during the 2021 legislative session. Substantial education and

- community partner engagement was conducted in 2021-22, as directed in the bill. ODE heard from over 3,500 Oregonians during the engagement process.
3. Who may be affected by this? As described in SB 744, Oregon students will not be required to show proficiency via an assessment in Essential Skills as a condition of receiving a high school diploma during the 2021-2022, 2022-2023, and 2023-2024 school years. This request extends that suspension through the 2026-27 academic year. While the Essential Skills Assessment will not be required, teaching reading, writing, and mathematics standards will remain a requirement. Furthermore, students will still be required to obtain 24 credits to graduate, which remains a high bar when compared to other state graduation requirements. ODE made recommendations to the Legislature and State Board, outlining options for a graduation process that we believe are equitable, accessible, and inclusive. Continuing this suspension is needed while we await legislative action in this area.
  4. Whose voice is missing? It is unknown which historically marginalized groups were included in the public comment testimony or the engagement process legislation conducted outside of the public comment legislative process. The Senate Bill 744 Implementation Team partnered with Oregon's Kitchen Table to intentionally engage over 3,500 education and community partners who have historically been and continue to be underserved by our education systems as evidenced by graduation rates, including: students who are members/citizens of Tribes that reside in Oregon, Indigenous and Native students, students experiencing disabilities, students who are emerging bilinguals, African American/Black students, Latino/a/x students, and students of color.
  5. What more information does the Board need prior to moving forward? We believe that all required information has been made available.

## **SUMMARY OF PREVIOUS BOARD ACTION**

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

Yes, The Oregon State Board of Education has previously suspended the assessment of Essential Skills during the 2019 - 20 and 2020 - 21 academic calendars.

- On June 11, 2020 at 11:30 AM the Oregon State Board of Education adopted 3.D. Administrative rules to implement guidance issued pursuant to Executive Order 20-20. ([Docket - temporary rules to implement EO 20-20 and the Department's guidance](#))
  - Graduation Pathways 2020 - Suspend all Essential Skills and Personalized Learning requirements for seniors (Career Related Learning Experiences, Extended Application, and Education Plan and Profile).
- On January 13, 2021 at 3:55 PM the Oregon State Board of Education adopted 3.A. Administrative rules to implement Ready Schools Safe Learners and Executive Order 20-29. ([January 2021 Docket - Administrative rules to implement RSSL and EO 20-29](#))
  - 581-022-0104 State Standards for the 2020-21 School Year - The rule specifies that for the 2020-21 school year, all division 22 standards are in effect unless waived by this rule. The following standards are waived for 2020-21: Essential Skills graduation requirements and local performance assessment requirements for grades 3 – 8 and high school.

- On March 17, 2022 at 10:05 AM the Oregon State Board of Education adopted 3.F Administrative rules to comply with the requirements made in Senate Bill 744 ([March 2022 Docket – Senate Bill 744 Implementation: OAR 581-022-2215](#))

## **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. Education and Community Partners**

- a. How have you intentionally involved stakeholders who are also members of communities affected by this rule?

As mentioned above, the Senate Bill 744 Implementation Team engaged over 3,500 Oregon education and community partners who have historically been and continue to be underserved by our education systems.

- b. Who are the historically underserved groups affected?

The groups outlined in the bill include the following: students experiencing disabilities, students who are emerging bilinguals, students who are immigrants or refugees, youth-led organizations, communities of color, and students who are Tribal members/citizens. ODE is soliciting feedback from youth beyond these requirements, as well, including youth who identify as LGBTQ2SIA+, are migrant, or are incarcerated.

- c. Has there been consultation or collaboration with Tribes in this rule change or policy decision?

Consultation and collaboration with Tribes and citizens of Tribes within Oregon was a critical aspect of the engagement plan.

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

The terms of the bill are established by statute; the expected outcome of making recommendations about graduation policies that are equitable, accessible, and inclusive, as well as the required engagement, hopefully enhances the information available to the State Board in making policy decisions to address the needs of students historically underserved by the system.

### **2. Negative/Positive Effects**

- a. What is the impact on the population most affected by this rule that the board should consider?

Summative test results in Oregon have been a tool for system accountability, bringing important focus in policy and resource distribution to students historically underserved

by the system. It is critical to evaluate the ways in which students demonstrate proficiency in core content in Oregon, as there are vast disparities in the percentages of students of color, students who are emerging bilinguals and students who experience disability who graduate by demonstrating proficiency via work samples or with modified diplomas.

Students will continue to be held accountable for all of Oregon's other graduation requirements, but will not be required to participate in an additional graduation validation process defined by state-approved assessment options, which removes this shared point of reference and high-level system accountability. While course requirements, credit requirements, and proficiency in reading, writing, and mathematics all remain requirements, the standards by which proficiency will be determined will live at the local level and will not be standardized or validated.

b. What possible opportunities, assets or access could this rule provide?

The bill presented an opportunity to reconsider and possibly redesign the Oregon Diploma to ensure innovation, visionary commitment to learning, equity, access and inclusive values. It has been fourteen years since we have revisited graduation requirements in Oregon. Graduating from high school represents a significant achievement for every student and should also serve as the fulfillment of our promise to students related to the opportunity they have had over thirteen years to develop, deepen, and extend their learning, knowledge base, and critical thinking skills across multiple content areas.

c. What is the impact on eliminating the opportunity or achievement gap?

The opportunity to graduate is one that has not been equitably experienced by Oregon's students who have been historically underserved. Identifying and recommending practices that are more equitable, accessible, and inclusive can help to reduce this opportunity gap. The social and educational systems in which these opportunity gaps are sourced remain, however, and will continue to influence what is feasible.

d. Have all the potential unintended consequences been considered?

Continuing the suspension of the Assessment of Essential Skills requirement will result in more local control of graduation decisions, but that may also result in less student accessibility, public transparency, and comparability.

e. Does this rule advance the ESSA goals?

The use of assessment within state graduation requirements is beyond the scope of ESSA, though the commitment to equity, accessibility, and inclusion are maintained in both policies.

3. What are the barriers to more equitable outcomes?

There are many socio-economic and education-related barriers regarding student graduation rates in Oregon. While graduation rates in Oregon have been increasing

overall, and some trajectories for students of color and students from Oregon’s tribes have been positive in recent years, many graduation disparities are present:

- State Four-Year Cohort Graduation Rate in 2021-22: 80.63%
- American Indian/Alaska Native: 67.00%
- Black/African-American: 73.48
- Hispanic/Latino: 77.04

Students experiencing disabilities graduated at a concerning rate of 66.08% and students who were emerging bilinguals (English Learners/ELs) in high school had a graduation rate of 64.36% (students who were former ELs graduated at 84.25%). It is also concerning that state summative test results are not increasing at rates that might help explain the increase in graduation rates. Student performance in ELA (reading/writing) and mathematics from 2017 through 2019 show stagnant trends; recent results show decreases that are the result of the disruption caused by the pandemic.

## EQUITY IMPACT ANALYSIS

### Impact of the Assessment of Essential Skills

The majority of students meet their Essential Skills in reading, writing, and mathematics using the statewide summative tests. The table below illustrates the percentage of students using each test option (statewide summative assessments, other standardized assessments approved by the State Board, and work samples) to earn a Regular Diploma in 2019 (the most recent available data).

Essential Skill	State Summative	Other Standardized Assessment	Work Sample
Reading	72%	16%	12%
Writing	68%	9%	23%
Mathematics	54%	19%	26%

Complete data, including a breakdown of these percentages by race/ethnicity in tabular and graphic formats are provided in Attachment 1 (which was also submitted in prior dockets). There are significant equity impacts for students who use work samples to meet the Assessment of Essential Skills graduation requirements, outlined below.

### Impact of Work Samples

Work samples are intended to be incorporated into student’s existing courses, but some evidence suggests that many high schools enroll students who have not met the Assessment of Essential Skills graduation requirement in “Work Samples” elective courses in their senior year. As a result, these students may not have the opportunity to participate in other elective courses that contribute to both student engagement and well-rounded educational opportunities. Significantly, the Essential Skills data reveal that this dynamic may disproportionately impact

Oregon's students of color, particularly for students who are American Indian/Alaska Native, Black/African-American, and emerging bilinguals, as a substantial percentage of Oregon's students of color meet the Assessment of Essential Skills graduation requirement using Work Samples. (See Attachment 1 for tabular and graphic data regarding how students met their Essential Skills proficiency requirements in 2019, the most recent data available.)

The disproportionate use of work samples by Oregon's students of color and emerging bilinguals and the resulting inequities for these students indicates the need for Oregon to more closely examine the impact of the Assessment Essential Skills graduation requirement as it currently exists on those student groups that have been and continue to be underserved by Oregon's social and education systems. It is also possible that these patterns denote a defensible use of assessment practices, as well, where the work samples are situated such that they honor student agency and identity and maintain challenging expectations for learning. The engagement process should help ODE to address this question.

### **FISCAL ANALYSIS**

Are there any fiscal impacts that the Board should consider as part of this update or report? Does the proposed rule change impact other stakeholders? There are no identified fiscal impacts that the Board should consider at this time.

### **ATTACHMENTS**

See *Attachment 1*, originally submitted with the June 11, 2020 docket.

**APPENDIX 2**  
**METHODS USED FOR 2018 - 2019 ESSENTIAL SKILLS REQUIREMENTS (Regular Diploma and Modified Diploma)**

Essential Skill	Diploma Type	Student Group	Total Diplomas	Method for Meeting Essential Skills								
				Smarter Balanced		Other Standardized		Work Sample		Work Sample not in	Local Assessment	Unknown
				# Students	% of Grads	# Students	% of Grads	# Students	% of Grads			
Math	Regular	American Indian/Alaska Native	445	197	44%	64	14%	179	40%	0	5	0
Reading	Regular	American Indian/Alaska Native	445	308	69%	64	14%	72	16%	0	1	0
Writing	Regular	American Indian/Alaska Native	445	279	63%	14	3%	150	34%	0	2	0
Math	Regular	Native Hawaiian/Pacific Islander	242	114	47%	29	12%	95	39%	0	4	0
Reading	Regular	Native Hawaiian/Pacific Islander	242	172	71%	26	11%	43	18%	0	1	0
Writing	Regular	Native Hawaiian/Pacific Islander	242	152	63%	10	4%	79	33%	0	1	0
Math	Regular	Black/African American	753	237	31%	85	11%	422	56%	0	9	0
Reading	Regular	Black/African American	753	420	56%	83	11%	238	32%	1	11	0
Writing	Regular	Black/African American	753	360	48%	43	6%	343	46%	0	7	0
Math	Regular	Hispanic/Latino	7390	3371	46%	861	12%	2888	39%	7	263	0
Reading	Regular	Hispanic/Latino	7390	5293	72%	743	10%	1304	18%	23	27	0
Writing	Regular	Hispanic/Latino	7390	4755	64%	234	3%	2346	32%	27	28	0
Math	Regular	Multi-racial	2070	1149	56%	407	20%	501	24%	0	13	0
Reading	Regular	Multi-racial	2070	1511	73%	350	17%	205	10%	0	4	0
Writing	Regular	Multi-racial	2070	1430	69%	190	9%	442	21%	0	8	0
Math	Regular	White	22661	12826	57%	4634	20%	4744	21%	4	450	3
Reading	Regular	White	22661	16531	73%	3934	17%	2043	9%	4	146	3
Writing	Regular	White	22661	15743	69%	2247	10%	4524	20%	10	134	3

Essential Skill	Diploma Type	Student Group	Total Diplomas	Method for Meeting Essential Skills								
				Smarter Balanced		Other Standardized		Work Sample		Work Sample not in	Local Assessment	Unknown
				# Students	% of Grads	# Students	% of Grads	# Students	% of Grads			
Math	Modified	American Indian/Alaska Native	30	13	43%	3	10%	11	37%	0	3	0
Reading	Modified	American Indian/Alaska Native	30	17	57%	1	3%	10	33%	0	2	0
Writing	Modified	American Indian/Alaska Native	30	17	57%	0	0%	9	30%	0	4	0
Math	Modified	Native Hawaiian/Pacific Islander	11	3	27%	0	0%	7	64%	0	1	0
Reading	Modified	Native Hawaiian/Pacific Islander	11	5	45%	0	0%	5	45%	0	1	0
Writing	Modified	Native Hawaiian/Pacific Islander	11	3	27%	0	0%	7	64%	0	1	0
Math	Modified	Black/African American	69	26	38%	2	3%	40	58%	0	1	0
Reading	Modified	Black/African American	69	36	52%	5	7%	28	41%	0	0	0
Writing	Modified	Black/African American	69	31	45%	2	3%	36	52%	0	0	0
Math	Modified	Hispanic/Latino	428	229	54%	21	5%	170	40%	1	7	0
Reading	Modified	Hispanic/Latino	428	269	63%	16	4%	134	31%	4	5	0
Writing	Modified	Hispanic/Latino	428	242	57%	5	1%	174	41%	2	5	0
Math	Modified	Multi-racial	106	45	42%	4	4%	52	49%	0	5	0
Reading	Modified	Multi-racial	106	70	66%	5	5%	30	28%	0	1	0
Writing	Modified	Multi-racial	106	56	53%	1	1%	48	45%	0	1	0
Math	Modified	White	949	407	43%	57	6%	460	48%	0	25	0
Reading	Modified	White	949	565	60%	58	6%	314	33%	1	11	0
Writing	Modified	White	949	513	54%	13	1%	408	43%	1	14	0

## Essential Skills Data Overview

### Methods used for 2018 – 19 Essential Skills Requirements (Regular and Modified Diploma)

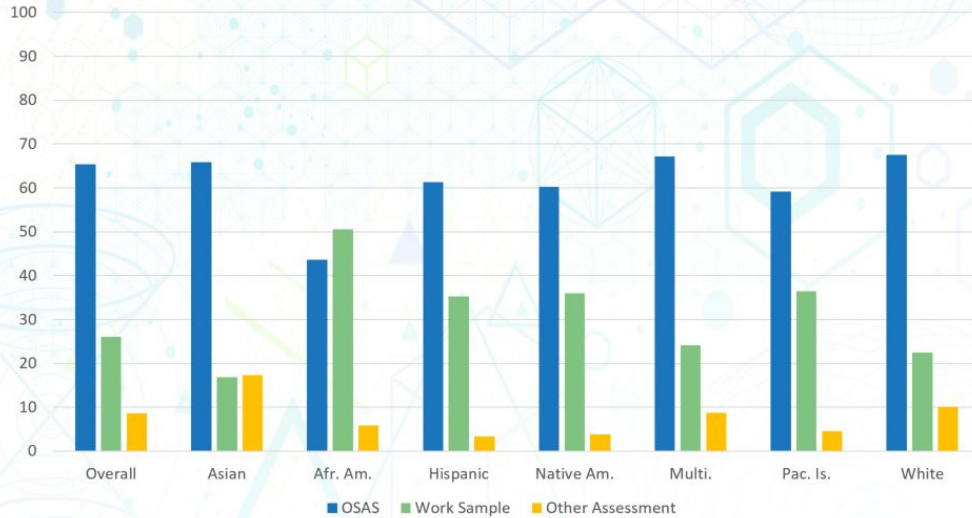
**Reading ES Method by Racial Demographic**



## Essential Skills Data Overview

### Methods used for 2018 – 19 Essential Skills Requirements (Regular and Modified Diploma)

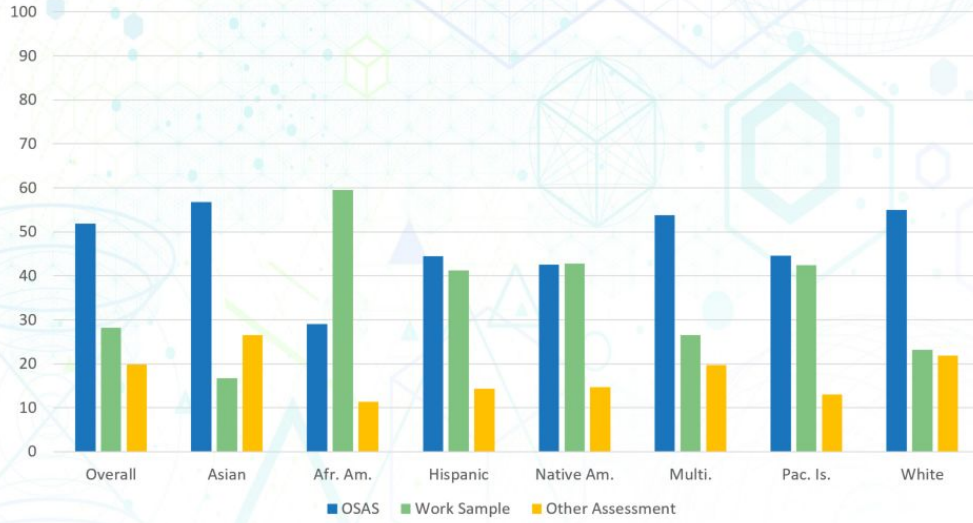
**Writing ES Method by Racial Demographic**



## Essential Skills Data Overview

### Methods used for 2018 – 19 Essential Skills Requirements (Regular and Modified Diploma)

**Mathematics ES Method by Racial Demographic**



## **581-022-2115**

### **Assessment of Essential Skills**

(1) Definitions. As used in this rule:

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

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

(c) "Local performance assessment" means a standardized measure (e.g., activity, exercise, problem, or work sample scored using an official state scoring guide), embedded in the school districts' and public charter schools' curriculum that evaluates the application of students' knowledge and skills.

(d) "Official state scoring guide" means an evaluation tool designed for scoring student work that includes specific, consistent assessment criteria for student performance and a 1-6 point scale to help rate student work. It is used by Oregon teachers to evaluate student work samples.

(e) "Student-initiated test impropriety" means student conduct that:

(A) Is inconsistent with:

(i) The Test Administration Manual; or

(ii) Accompanying guidelines; or

(B) Results in a score that is invalid.

(f) "Work sample" means a representative sample of individual student work (e.g., research papers, statistical experiments, speaking presentations, theatrical performances, work experience) that may cover one or more content areas and therefore may be scored using one or more official state scoring guide(s). At the high school level, a work sample can be used to fulfill both the local performance assessment requirement described in Section 2 of this rule and the Essential Skills requirement described in Section 3 of this rule.

(2) School districts and public charter schools that offer grades 3 through 8 or high school shall administer local performance assessments for students in grades 3 through 8 and at least once in high school. For each skill area listed in section (17) of this rule, the assessments shall consist of:

(a) One work sample per grade scored using official state scoring guides; or

(b) Comparable measures adopted by the district.

(3) School districts and public charter schools shall require high school students to demonstrate proficiency in the Essential Skills using assessment options that are approved by the State Board of Education for the purpose of student eligibility for:

(a) The high school diploma as established in OAR 581-022-2000; or

(b) The modified diploma as established in OAR 581-022-2010.

(4) Pursuant to ORS 339.115 and 339.505, school districts and public charter schools shall provide any eligible student with instruction in and multiple assessment opportunities to demonstrate proficiency in the Essential Skills for the purpose of achieving the high school diploma or the modified diploma.

(5) To be eligible to receive a high school diploma or a modified diploma:

(a) For students first enrolled in grade 9 during the 2008-2009 school year, school districts and public charter schools shall require students to demonstrate proficiency in the Essential Skill listed in section (16)(a) of this rule: Read and comprehend a variety of text.

(b) For students first enrolled in grade 9 during the 2009-2010 school year, school districts and public charter schools shall require students to demonstrate proficiency in the Essential Skills listed in sections (16)(a)-(b) of this rule:

(A) Read and comprehend a variety of text; and

(B) Write clearly and accurately.

(c) For students first enrolled in grade 9 during the 2010-2011 school year, school districts and public charter schools shall require students to demonstrate proficiency in the Essential Skills listed in section (16)(a)-(c) of this rule:

(A) Read and comprehend a variety of text;

(B) Write clearly and accurately; and

(C) Apply mathematics in a variety of settings.

(d) For students first enrolled in grade 9 during the 2011-2012 school year or first enrolled in grade 9 in any subsequent school year, school districts and public charter schools shall require students to demonstrate proficiency in the Essential Skills listed in Section 16(a)-(c) of this rule and any additional Essential Skills for which:

(A) The State Board of Education has adopted the determination to phase in for inclusion in the high school diploma and modified diploma requirements; and

(B) The State Board of Education has adopted assessment options by March 1 of the student's 8th grade year.

(e) School districts and public charter schools may require students to demonstrate proficiency in additional Essential Skills beyond the minimum requirements described in section (5)(a)-(d) of this rule.

(6) The Superintendent of Public Instruction shall establish an Assessment of Essential Skills Review Panel (AESRP) to make recommendations on:

(a) The phasing in of Essential Skills for inclusion in the high school diploma and the modified diploma requirements;

(b) The adoption of assessment options to measure students' proficiency in the approved Essential Skills for the purpose of the high school diploma or the modified diploma; and

(c) The achievement standards used to determine student eligibility for the high school diploma or the modified diploma.

(7) The AESRP shall work toward the goal of a system with a high degree of technical adequacy and equivalent rigor between assessment options as practicable.

(8) The AESRP shall base its recommendations on evidence provided by:

(a) School districts;

(b) Research organizations; and

(c) Other experts.

(9) The AESRP shall consist of assessment experts from:

(a) School districts, including but not limited to:

(A) Superintendents;

(B) Principals;

(C) Curriculum Directors;

(D) Educators;

(E) Special education educators; and

(F) English Language Learners (ELL) educators;

(b) Post-secondary education institutions; and

(c) Business partners who have expertise in:

(A) Assessment design;

(B) Assessment administration; or

(C) Use of assessments

(10) The State Board of Education shall make the determination to adopt the AESRP's recommended assessment options, and achievement standards for the purpose of conferring high school diplomas and modified diplomas. The determination of the State Board of Education will be final and not subject to appeal.

(11) The ODE shall issue the State Board of Education's intentions regarding the AESRP's recommendations by December 15 of each year and formal notice of the State Board of Education's final determination regarding the AESRP's recommendations by March 1 of each year as an addendum to the Test Administration Manual, which the ODE shall issue by August 1 of each year.

(12) School districts and public charter schools shall adhere to the requirements set forth in the Test Administration Manual to:

(a) Administer;

(b) Score;

(c) Manage; and

(d) Document the district and school assessments of students' proficiency in the Essential Skills required to receive a high school diploma or a modified diploma.

(13) School districts and public charter schools shall establish conduct and discipline policies addressing student-initiated test impropriety.

(14) School districts and public charter schools shall allow students to use assessment options and achievement standards adopted by the State Board of Education in a student's ninth through twelfth grade years as follows:

(a) Students may demonstrate proficiency in the Essential Skills using assessment options adopted in their ninth through twelfth grade years.

(b) Students may use achievement standards adopted in their 9th through 12th grade years that are equal to or lower than the achievement standards approved as of March 1 of the students' 8th grade year.

(15) Districts may develop and administer a local assessment option for students to demonstrate proficiency in the Essential Skills, using established professional and technical standards in place of the assessment options adopted by the State Board of Education as described in section 14 of this rule. Districts that choose this option are required to publish:

(a) A communication strategy to ensure stakeholders are notified of the district's approach to the local assessment option; and

(b) Materials written in plain language that contain descriptions of the

(A) Purpose of the assessment;

(B) Scoring methodology;

(C) Method by which students and parents will receive results from the assessment;

(D) Criteria for determining student proficiency using the assessment; and

(E) Criteria for determining which students will have access to the assessment

(16) The ODE shall publish the subset of Essential Skills assessment options and the associated performance levels which may be used by each of Oregon's post-secondary institutions as defined by those institutions' policies provided to the ODE by October 15 of each year.

(17) The Essential Skills identified by the State Board of Education as of July 1, 2008 are as follows:

(a) Read and comprehend a variety of text;

(b) Write clearly and accurately;

(c) Apply mathematics in a variety of settings;

- (d) Listen actively and speak clearly and coherently;
- (e) Think critically and analytically;
- (f) Use technology to learn, live, and work;
- (g) Demonstrate civic and community engagement;
- (h) Demonstrate global literacy; and
- (i) Demonstrate personal management and teamwork skills.

(18) School districts and public charter schools shall include one or more local performance assessments for grades 3 through 8 and for high school for each of the following skill areas:

- (a) Writing;
- (b) Speaking;
- (c) Mathematical problem-solving; and
- (d) Scientific inquiry.

(19) School districts and public charter schools may include one social science analysis work sample that is administered in accordance with school district or public charter school policies as a local performance assessment for grades 3 through 8 and for high school.

(20) For students on an Individualized Education Plan (IEP) or 504 Plan, if a student's IEP or 504 Team determines that the nature of a student's disability prevents the student from demonstrating proficiency in an Essential Skill using any of the approved assessment options listed in the Test Administration Manual, the student's IEP Team may exempt the student from the requirement as listed in the Test Administration Manual and determine an appropriate replacement assessment option for the student to use that addresses the Essential Skill in a manner that is consistent with:

- (a) The student's instructional plan; and
- (b) The state assessment criteria adopted by the State Board of Education.

(21) For students seeking a modified diploma, school districts and public charter schools may modify the assessment options adopted by the State Board of Education when the following conditions are met:

(a) For students on IEP or 504 Plans:

(A) School districts and public charter schools must comply with all requirements established by the student's IEP or 504 Plan when implementing modifications for work samples;

(B) School districts and public charter schools must comply with OAR 581-022-2100 section (4)(d) when implementing modifications for a statewide assessment.

(b) For students not on IEP or 504 Plans:

(A) School districts and public charter schools may only implement modifications for work samples that are consistent with the modifications the student has received during instruction in the content area to be assessed in the year in which the work sample is administered.

(B) School districts and public charter schools must obtain approval from the school team responsible for monitoring the student's progress toward the modified diploma before implementing modifications for work samples.

(C) Consistent with OAR 581-022-2100, school districts and public charter schools may not implement modifications for statewide assessments for students who are not on an IEP or 504 Plan.

(22) The Essential Skills graduation requirements established by Sections 3, 4, and 5 of this rule are waived for students graduating through the 2027-28 school year.

**Statutory/Other Authority:** ORS 329.451, 338.025, 339.115 & 339.505

**Statutes/Other Implemented:** 329.045, 329.075, 329.451, 329.485 & 338.115

**History:**

Renumbered from 581-022-0615 by ODE 16-2017, f. & cert. ef. 7-5-17

ODE 8-2011, f. & cert. ef. 7-1-11

ODE 19-2009, f. & cert. ef. 12-10-09

ODE 10-2009(Temp), f. & cert. ef. 9-1-09 thru 2-28-10

ODE 17-2008, f. & cert. ef. 6-27-08



# Continued Suspension of the Assessment of Essential Skills

Oregon State Board of Education

June 15, 2023

Dan Farley

Office of Research, Assessment, Data, Accountability, and Reporting

[dan.farley@ode.oregon.gov](mailto:dan.farley@ode.oregon.gov)

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# OAR 581-022-2115

## **Subject: Suspension of the Assessment of Essential Skills**

**Concept:** The Governor, Legislature, and State Board all continue to consider recommendations found in the Senate Bill 744 Report: [Community-Informed Recommendations for Equitable Graduation Outcomes](#).

### **Background:**

- The Assessment of Essential Skills policy requires students to demonstrate proficiency in relation to state-approved assessment options in reading, writing, and mathematics (though there are six additional Essential Skills that do not have a state level assessment requirement)
- Assessment options include: 1) state summative tests, 2) other standardized tests, 3) work samples, or 4) district-developed tests<sup>218</sup>
- Most Oregon students historically used the state summative tests to meet this requirement
- This requirement was suspended by Senate Bill 744 through the 2023-24 school year
- The Governor, Legislature, and State Board need additional time and engagement to finalize implementation of any of the recommendations

# Timeline

- **2021** - Senate Bill 744 suspended the Assessment of Essential Skills policy through 2023-24
- **2021-22** - ODE engaged with over 3,500 Oregonians in the 2021-22 school year to determine what community values should be represented in the Oregon Diploma
- **September 1, 2022** - ODE synthesized available research, other states' graduation practices, and input from Oregonians to make two determinations and eight recommendations for making graduation requirements more equitable
  - Recommendation #5 was to discontinue the Assessment of Essential Skills policy (see Pages 116-117)
- **2023 Long Session** - [Senate Bill 3](#) would establish a .5 credit requirement in “higher education and career path” skills and a .5 credit requirement in “personal<sup>19</sup> financial education” for students who graduate in spring 2027, if passed, in [ORS 329.451](#)
- The State Board, in partnership with Governor Kotek, will be considering diploma requirement recommendations

# Senate Bill 744

## Two Determinations and Eight Recommendations were offered on September 1, 2022

- *The Senate Bill 744 report made two determinations: 1) that the skills and knowledge expected by business, industry, and postsecondary education do not fully align with the current requirements for the Oregon Diploma and 2) that the requirements for Oregon high school diplomas have been applied inequitably to different student populations.*
- *Inequities were seen in terms of graduation outcomes, the type of diplomas that Oregon's systems graduate students holding, and the ways in which students meet their Assessment of Essential Skills Requirements.*

***Continuation of this suspension removes a graduation requirement that has generated inequitable outcomes by race/ethnicity, IEP status, and EL status for Oregon's students. The policy has also demonstrated no identifiable benefit for students in terms of studied postsecondary outcomes. The extended time period allows for the State Board to consider what action(s) to take in response to the recommendations generated in the report.***

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- *There are no fiscal impacts of continuing the suspension of the Assessment of Essential Skills policy*
- *Students, schools, and districts will not have to adhere to this policy requirement and all related processes (e.g., monitoring progress in relation to this policy, data entry and validation, etc.), which allows students and staff to focus on other aspects of learning*

# Requested OAR Change

The State Board will be asked to extend the suspension of the Assessment of Essential Skills at OAR 581-022-2115 while further legislative and board action is pending.

- (22) The Essential Skills graduation requirements established by Sections 3, 4, and 5 of this rule are waived for students graduating **through the 2027-28** school year

This change allows for more time for a formal response from the state board, while<sup>221</sup> protecting students who have already planned their education plan and profile (i.e., they have already mapped out a plan for graduation that does not include meeting this requirement)

# 581-022-2225 OAR Change Discussion



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# Thank you



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Created by EN 2-18-2023

**OAR 581-022-XXXX Menstrual Dignity for Students**

All public school districts and charter schools must comply with the requirements imposed upon education providers in ORS 329.545, OAR 581-021-0590, and OAR 581-021-0593.

Statutory/Other Authority: ORS 326.545

Statutes/Other Implemented: ORS 326.545

# Oregon State Board of Education

June 15, 2023

AGENDA ITEM: 7.A.

<p><b>SUBJECT:</b> Menstrual Dignity Division 22 OAR (581-022-2515)</p> <p><b>STAFF NAME &amp; OFFICE:</b> Emily Nazarov, Office of the Director; Sasha Grenier and Susan Payne, OTLA</p> <p>This would be a new rule in Division 22 that requires school districts and charter schools to comply with OAR 581-021-0590 Menstrual Dignity for Students: Requirements and OAR 581-021-0593 Menstrual Dignity for Students: Education.</p> <p><input checked="" type="checkbox"/> New Rule <input type="checkbox"/> Amend Existing Rule <input type="checkbox"/> Repeal Rule</p>	<p><input checked="" type="checkbox"/> <b>First Reading</b> <input checked="" type="checkbox"/> <b>Presentation</b> <input type="checkbox"/> <b>No Presentation</b></p> <p><input type="checkbox"/> <b>Action</b> <input type="checkbox"/> <b>Temp Rule</b> <input type="checkbox"/> <b>Presentation</b> <input type="checkbox"/> <b>No Presentation</b></p>
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## BACKGROUND

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The Menstrual Dignity Act (HB 3294, 2021) is an important piece of legislation that went into effect for the 2021-22 school year, with full phase-in completed by the 2022-23 school year. The Act created the requirement for school districts to provide free menstrual products for all menstruating students in public schools in Oregon, including elementary, middle, and high school students. This new program helps students participate actively in classes and school activities by alleviating some of the economic strain and experiences of shame that are often barriers for menstruating students accessing their education.

Permanent rules (OAR 581-021-0587 through 581-021-0596) were adopted by the State Board of Education in March 2022. These rules are in Chapter 581, Division 21, School Governance and Student Conduct. While districts are required to comply with the rules, ODE does not have enforcement authority. That means that if a student, parent, or community member made a complaint that the district was not complying with the requirements of [OAR 581-021-0590](#) to install dispensers in every bathroom, the complainant would not be able to appeal the district's decision to ODE.

[ORS 327.103](#) provides ODE the authority to enforce rules within Chapter 581, Division 22, State Standards for Public Elementary and Secondary Schools; the Department monitors compliance through both the assurances process and the complaints and appeals process. The State Board of Education has the discretion to establish state standards for public schools and therefore to determine which rules are part of Division 22.

ODE has received few public comments on the proposed connection to Division 22, and those comments have been mixed. While ODE has been hearing from community members expressing concern about the accountability measures lacking when the rules live within Division 21, ODE has also heard from school leaders expressing concern about the shift.

### Comments in support (3 out of 3):

“By having district leadership certify that they are in compliance yearly, it will remind them of the importance of the work and push them to double check that they are truly in compliance. I also

# Oregon State Board of Education

June 15, 2023

AGENDA ITEM: 7.A.

appreciate that it would allow for a complaint process, which is much needed for the rule. I worry about students and families who feel that their needs may not be met by districts who are not compliant and having no way of voicing their concerns.” – A school health director in a medium-sized district

“I support this change and greater accountability for districts. We have districts that do not plan to comply and/or school boards that do not want to comply and want to direct staff not to comply. Staff and districts need both the leverage, protection and impetus to follow this law and implement it for the benefit of students.” – An administrator of a large district

“A school is required to meet students’ medical needs and providing for menstrual needs is no different. It is crucial that schools are held accountable for meeting these needs to ensure that students in Oregon are receiving the education that you have promised them. There are many schools that either simply don’t comply with the bill or only partially comply which cannot be tolerated any longer. Trans youth and non-binary youth live in every part of our state and are already experiencing mass inequalities as it is. 1 in 5 transgender individuals are outright denied healthcare due to their gender identity (National LGBTQ Task Force)- schools should not be a place where this pattern is continued. I encourage you to pass this amendment to guarantee all attendees of Oregon schools are fully provided for medically and receive their deserved education.” A student and advocate in Oregon

### **Comments in opposition (3 out of 8):**

“We are getting "Ruled" to death. Our district is in compliance and will continue to be because it is the right thing to do, but the last thing we need is additional rules and reporting requirements.” - A Superintendent of a rural district

“I also have been told that many other districts are being silently non-compliant. Including this as a Division 22 requirement may burden ODE with many new complaints and I know that the agency is severely understaffed with people who process those complaints. Rural schools with more conservative families are rarely considered when these rules are made. It really puts the superintendents in a bind and has the very real possibility of political problems, even up to job loss for really good people.” – A Superintendent of a rural district

“Half of Supts. in the state last year were new, including myself... It is not best practice to punish the entire class for the misdeeds of a few. If there are complaints about a school district not adhering to directives, why not contact that school district, and employ progressive discipline if they are indeed found in error? Covid was bone-crushingly difficult on educators. We are still recovering from that, and step one is roll out the menstrual dignity act, two is to make charges against superintendents, and now step up compliancy on both? How about more carrot and less stick? In a time of unprecedented teacher shortages, we continue to continuously add more.”-- Superintendent of a rural district

### **SUMMARY OF PREVIOUS BOARD ACTION**

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The State Board voted to pass the Menstrual Dignity for Students temporary rules on September 16, 2021. Permanent rules (OAR 581-021-0587 through 581-021-0596) were adopted by the Board on March 16, 2022.

# Oregon State Board of Education

June 15, 2023

AGENDA ITEM: 7.A.

## HAS THE RULE CHANGED SINCE LAST BOARD MEETING?

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

## POLICY ISSUE OR CONCERNS

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The primary policy issue is to increase accountability for districts to comply with the requirements of the Menstrual Dignity Act and to signal its importance by including a standard in Division 22. This shift intends to elevate the original intention of the Act, knowing that it will serve all students equitably with a service that will help them access their education. We know that many students confront barriers related to economic strain, fear, and shame when accessing and using menstrual products and menstrual education—and this Act aims to remedy these inequities.

ODE is also aware that shifting these requirements to be under the authority of Division 22 during the final phase-in year of the Act may further disconnect some districts from the intention of the law. Some school leaders have requested more time and resources to gather community support and come into full compliance.

## EQUITY IMPACT ANALYSIS

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Equity, privacy, and dignity is a central component to the Menstrual Dignity Act. Students benefit when they have access to menstrual products in private spaces that do not require asking a school nurse, counselor, school staff, or other students for supplies. Furthermore, students who experience poverty, houselessness, or come from systems-impacted communities, including transgender, non-binary, intersex, and two spirit/indigiqueer students, are more likely to have unmet menstrual needs. Unfortunately, when districts fail to comply, these vulnerable student populations are those most likely to experience harm.

It is also true that some districts have struggled to provide menstrual products in all bathrooms, due to community and staff opposition. Beyond asserting compliance, districts will need more technical support, tools, and time to fully partner with ODE in the implementation of the rules.

## FISCAL ANALYSIS

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If the Menstrual Dignity requirements are enforceable by ODE under Division 22, there could be an increase in workload for ODE's Complaints and Appeals team.

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

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The effect of a 'yes' vote will be to include a new rule in Division 22, allowing ODE to monitor compliance with the Menstrual Dignity requirements through the assurances processes and to enforce them through the complaints and appeals process. However, this also may result in dismay among rural

# Oregon State Board of Education

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AGENDA ITEM: 7.A.

district school leaders, staff, and community members that feel that their voices are not heard in their attempt to comply with requirements.

The effect of a 'no' vote will be that ODE will have limited options for holding districts accountable for implementing and upholding the requirements.

## STAFF RECOMMENDATION

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

## ATTACHMENTS

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Attachment 1: Menstrual Dignity for Students - OAR 581-022-XXXX



# Menstrual Dignity for Students

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**Sasha Grenier (she/her)**  
Sexuality Education Specialist

**Emily Nazarov (she/her)**  
Government and Legal Affairs  
Manager

**Susan Payne (she/her)**  
Division 22 Standards and  
Systems Specialist

# Menstrual Dignity for Students Timeline

Original statute came into effect

July 1, 2021

Permanent rules adopted by the State Board of Education

March 17, 2022

First reading for proposed Division 22 rule

June 15, 2023

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September 16, 2021

Temporary rules adopted by the State Board of Education

2022-23 SY

School community members express concern about the accountability measures of the rules within Division 21

# Why Menstrual Dignity?



Oregon Department of Education

## Students need menstrual products in schools

- One in five students have **struggled to afford** menstrual products
- More than four in five students have either **missed class time** or know someone who did because they did not have access to menstrual products
- 80% of teens feel there is a **negative** association with periods, that they are gross or unsanitary
- Disproportionate impacts for **students of color, students experiencing disabilities, and students experiencing poverty**

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Lack of access to menstrual products and menstrual health education can have long-lasting and negative effects on young people, including: **emotional anxiety, traumatic experiences, as well as education setbacks and medical issues.**

**Sources:** *The State of the Period*, A joint paper by Thinx and PERIOD  
*Unmet Menstrual Hygiene Needs Among Low-Income Women*, Anne Sebert Kuhlmann, PhD, MPH, et. al. American College of Obstetricians and Gynecologists, 2019

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# Menstrual Dignity for Students Program

## Requirements snapshot

- ❑ Products and dispensers must be installed in **all student bathrooms by 2022-23**.
- ❑ **Products and dispensers** must be provided in a **safe, private, accessible, and gender-affirming** manner. Schools should plan program details, including **dispenser selection, product variety, and placement**.
- ❑ **Education** must cover menstrual health as a **positive** part of being human, without shame, and that is **affirming and accessible for all students of all genders**. Instructions must be available in bathrooms.

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A recap

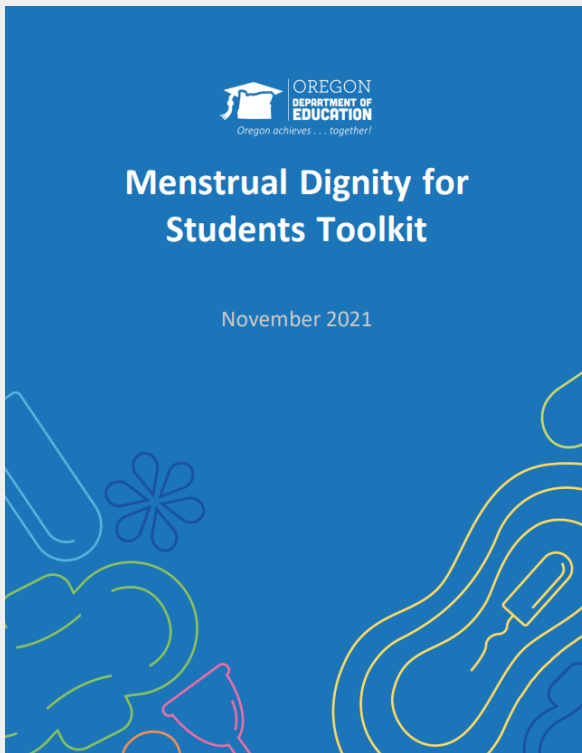
## Pillars of Menstrual Dignity

The Menstrual Dignity Act ([HB 3294](#), 2021), the temporary [OARs](#), and the [Menstrual Dignity for Students Toolkit](#) hold **student equity** and **menstrual dignity** at the center so that all students have the opportunity for safe, dignified self-care.

Privacy	Inclusivity	Access	Education
<ul style="list-style-type: none"><li>● Space</li><li>● Autonomy</li><li>● Personal safety</li></ul>	<ul style="list-style-type: none"><li>● Cultural responsiveness</li><li>● Gender affirming</li></ul>	<ul style="list-style-type: none"><li>● For students of all abilities &amp; languages</li><li>● Options &amp; choice</li></ul>	<ul style="list-style-type: none"><li>● Menstrual health</li><li>● Instructions</li><li>● Positive and not fear- or shame- based</li></ul>

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# Menstrual Dignity for Students Toolkit Overview



The Menstrual Dignity Act ([HB 3294](#), 2021) created the requirement for education providers to provide free menstrual products for all students in all public school buildings in Oregon.

## What's included in the Toolkit?

- I. Introduction: Menstrual Dignity**
- II. Oregon Administrative Rules**
- III. Program Requirements**
  - A. Dispensers
  - B. Menstrual Products
  - C. Trash Receptacles
  - D. District Spotlight: Falls City School District
- IV. Education**
  - A. Menstrual Product Instructions
  - B. Menstrual Health Education in the Classroom
- V. Staff Engagement & Training**
  - A. Key Messages for Staff
  - B. Resources for Staff Training
- VI. Student & Youth Engagement**
  - A. Student-Facing Resources
- VII. Family & Community Engagement**
  - A. Sample Family & Community Letter
  - B. Tips for Menstruation - Positive Language for Families
- VIII. Funding & Reimbursement**
  - A. Processes, Documents, and Forms
- IX. Frequently Asked Questions (FAQ)**

# Understanding the Toolkit

**Equity-centric recommendations** based on the four pillars of menstrual dignity are included below requirements throughout toolkit

## Menstrual Products

In order to accommodate the natural variation of body size and menstrual flow of students who menstruate, a variety of products including absorbency and size are required. Variety of products is also an important culturally responsive practice, which honors a range of values and beliefs around menstrual product use.

“‘Products’ means tampons and menstrual pads.”

OAR 581-021-0600

### Requirements Per OAR [581-021-0603](#)

- (1) All education providers shall install in every student bathroom (a) at least one dispenser that:
  - (E) Provides a **variety of products** with consideration of absorbency and size options

### Recommendations

Based on these [pillars of menstrual dignity](#): **Privacy** **Inclusivity** **Access** **Education**

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- When determining product availability, schools can also consider having a **mix of single use and reusable** products available per building.
- Monitoring **student input** and **actual product use** should inform selection of product sizes, absorbency, and brands. Prioritize [student engagement](#).
- Address [myths](#) around **tampon use** and safety.

For information on different types of menstrual products, click on the blue button below.

Click for Menstrual Product Options 1-Pager



# Menstrual Dignity for Students Program

## Other support provided by ODE

- ✓ 2021 Menstrual Dignity Toolkit & 2022 Update
- ✓ Presentations and trainings for:
  - ❑ Coalition of Oregon School Administrators (COSA)
  - ❑ Oregon School Nurses Association (OSNA)
  - ❑ Oregon Association of School Business Officials (OASBO)
  - ❑ Oregon Youth Sexual Health Partnership (OYSHP), and others.
- ✓ Quarterly **Menstrual Dignity Newsletter**
- ✓ Ad hoc meetings and **technical assistance**
- ✓ **Grant management** support

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# Hearing from students



We don't even have menstrual products, **teachers buy them with their own money** to put in bathrooms for students.

I wish that this school had free feminine products because some [low income families] **don't have enough** money to help their daughters with it.

At my school they just installed dispensers for both pads and tampons, the issue we have here at my specific school is that the **pads are very thick and "outdated by maybe 50 years"**

There are machines in the girls bathroom at the school that require money, specifically quarters which **very few students carry.**

I personally feel much more comfortable when I know there are period products in a bathroom. I don't stress about making sure I always have a tampon on me. **Knowing that I can be protected even when I'm not prepared is amazing.**

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# Hearing from schools



This is wonderful having these supplies handy for our students. **Helps keep kids in school!**

It is very hard keeping the dispensers in the boys restroom in a middle school. They **keep getting ripped off the walls.**

We are making sure that our internal team knows the process for keeping dispensers stocked and **teaching students expectations for appropriate dispenser usage** - especially in our elementary and middle schools.

It feels good to **create a more inclusive environment!**

The products have been used since inception. **Having the dispensers is more than helpful** since we have used drawer storage before this.

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We are a small school. We have two student bathrooms plus a gender neutral bathroom for student use. We have pads and tampons in each bathroom and **remind our students** of this at the beginning of the school year.

# Oregon's Menstrual Dignity Program in the News



- [Oregon becomes first state in the US to require all schools provide free menstrual products](#), KGW
- [Bend Senior HS students reach goal of improving access to menstrual products across state](#), KTVZ
- [ODE toolkit preps Oregon schools to offer free menstrual products](#), KOIN
- [Bend Students Lead Changes to Menstrual Product Access in State Schools](#), Central Oregon Daily
- [Oregon's Menstrual Dignity Act, Free Menstrual Products at All Public Schools](#), Aunt Flo
- [Social Addendum: Dispensing facts about the need for accessible periods products in all OSU restrooms](#), The Daily Barometer
- [Period Action Day: How young people convinced Oregon to put free period products in schools](#), Today.com
- [Youth Voices: Forest Grove students advocate for menstrual equity](#), Oregonian/Oregon Live

# Division 22 Standards: The Big Picture



- All Oregon administrative rules (OARs) set out in Chapter 581, Division 22, Standards for Public Elementary and Secondary Schools.

Example: 581 - 022 - 0102 Definitions  
Ch. Div. Rule Title

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- The standards that the Oregon legislature or the State Board has determined must be met in order to be a standard school district.
- Compliance with these rules ensures a baseline level of service across the state.

# What Makes Division 22 Standards Different?

The Oregon legislature has directed ODE to enforce Division 22 Standards under ORS 327.103.

- All districts are presumed to be in compliance until a deficiency is found.
- Once a deficiency is found, ODE works with the district to get the district back in compliance.
- If a district fails to come back into compliance after an opportunity for corrective action, ODE may withhold a portion of the district's State School Fund money.

ODE *does* have some flexibility in the processes it uses to enforce Division 22 Standards.



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# Division 22 Standards: Monitoring Compliance

## Division 22 Assurances Process

Require school districts to certify to their local community and ODE that they are in compliance with Division 22 Standards.



**SPECIFIC  
POINT IN TIME**

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## Includes Ongoing Coaching & Professional Learning

Assist districts in understanding and complying with the standards.



**CONTINUOUS**

## Complaint Process

Enforce school districts to meet the standards upon the filing of an appeal.

# Positive Feedback

**Feedback and comments** received from the parents, students, and school staff:

**By having district leadership certify that they are in compliance yearly, it will remind them of the importance of the work and push them to double check that they are truly in compliance. I also appreciate that it would allow for a complaint process, which is much needed for the rule. I worry about students and families who feel that their needs may not be met by districts who are not compliant and having no way of voicing their concerns.**

**A School District Health Services Director**

**I support this change and greater accountability for districts. We have districts that do not plan to comply and/or school boards that do not want to comply and want to direct staff not to comply. Staff and districts need both the leverage, protection and impetus to follow this law and implement it for the benefit of students.**

**A Superintendent of a mid-sized District on the I-5 corridor**

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# Negative Feedback

**Feedback and comments** received from the parents, students, and school staff:

**We are getting "Ruled" to death. Our district is in compliance and will continue to be because it is the right thing to do, but the last thing we need is additional rules and reporting requirements.**

**A Superintendent**

**I also have been told that many other districts are being silently non-compliant. Including this as a Division 22 requirement may burden ODE with many new complaints and I know that the agency is severely understaffed with people who process those complaints. Rural schools with more conservative families are rarely considered when these rules are made. It really puts the superintendents in a bind and has the very real possibility of political problems, even up to job loss for really good people.**

**A Superintendent**

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# Menstrual Dignity for Students OAR

## **OAR 581-022-XXXX Menstrual Dignity for Students**

All public school districts and charter schools must comply with the requirements imposed upon education providers in ORS 329.545, OAR 581-021-0590 Menstrual Dignity for Students: Requirements, and OAR 581-021-0593 Menstrual Dignity for Students: Education.

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# Next Steps

Staff will return to the State Board in September for an adoption vote

Between now and the September Board meeting, members of the public are welcome to submit public comment for consideration.

- Opportunities for public comment include:
  - Attend the Administrative Rules Hearing on Friday, August 25<sup>th</sup> at 1:00pm. Contact Rules Coordinator Haedon Brunelle ([haedon.brunelle@ode.oregon.gov](mailto:haedon.brunelle@ode.oregon.gov)) if you have questions about the hearing.
  - Submit your comments in writing to ODE at [ODE.RuleTestimony@state.or.us](mailto:ODE.RuleTestimony@state.or.us).
  - Submit your comments to the State Board of Education at [StateBoard.PublicEmail@ode.oregon.gov](mailto:StateBoard.PublicEmail@ode.oregon.gov).

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# Questions?

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**Sasha Grenier (she/her)**

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**Susan Payne (she/her)**

Division 22 Standards and  
Systems Specialist  
[susan.payne@ode.oregon.gov](mailto:susan.payne@ode.oregon.gov)

# Oregon State Board of Education

June 15, 2023

AGENDA ITEM: 8.A.

<p><b>SUBJECT:</b> Achievement Level Descriptor and Cut Score Adoption for the Alt ELPA <b>STAFF NAME &amp; OFFICE:</b> Dan Farley, Andrea Lockard, Mason Rivers, and Ben Wolcott</p> <p>Office of Research, Assessment, Data, Accountability, and Reporting</p> <p>In 2023, the state of Oregon administered a new test, called the Alt ELPA. In order to report the results of this test, the State Board of Education will need to adopt achievement level descriptors and cut scores which define student performance levels and proficiency.</p>	<p><input checked="" type="checkbox"/> <b>Informational Presentation</b></p> <p><input type="checkbox"/> <b>Written Report</b></p>
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## BACKGROUND

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### 1. History:

In spring 2023, OR administered a new test call the Alternate English Language Proficiency Assessment, or Alt ELPA. This test, which forms an alternative to the general ELPA Summative assessment, measures the English proficiency of eligible English learners with significant cognitive disabilities in grades K-12.

Because the 2023 administration was the test’s first administration, the achievement level descriptors (ALDs) that define in words what performance at each of four levels means across all grade bands, as well as the cut scores that accurately define the boundaries for each performance level, need to be adopted by the State Board of Education (SBE) to define proficiency on the Alt ELPA. A standard setting process facilitated by a vendor will generate recommended ALDs and cut scores for the SBE’s consideration will be completed in summer 2023. ODE will subsequently bring these proposed ALDs and cut scores to the SBE for approval.

### 2. Purpose

Student performance on the Alt ELPA determines whether a student retains English learner status (continuing to receive English language development services and test annually on the Alt ELPA) or exits EL status.

### 3. Does the board have any areas of discretion on this policy and/or update?

While it is very uncommon for the SBE to deviate from the specific recommendations provided by standard setting panelists, the SBE may choose to approve, revise, or reject the recommended ALDs and cut scores.

### 4. Stakeholder voice/input (individual and collective i.e., groups)

Standard setting is a technical process that requires measurement experts and educators who have expertise in the relevant content areas. Standard setting will take place in July 2023, facilitated by the test development vendor ELPA21 and involving educators with Special Education and multilingual learner experience from every state across the consortium, including Oregon.

The work of this panel will most directly affect the students who are participating in the Alt ELPA (students who have EL status and are experiencing the most significant cognitive disabilities.) The Board will be informed of the ALDs and cut scores that are determined as a result of the July 2023 standard

# Oregon State Board of Education

June 15, 2023

AGENDA ITEM: 8.A.

setting process.

## **SUMMARY OF PREVIOUS BOARD ACTION**

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This is an informational presentation to prepare for a first read in the fall. There is no previous Board action for the Alt ELPA. The SBE has historically adopted ALDs and cut scores for all of Oregon’s statewide general and alternate tests, including our English language arts/literacy, mathematics, and science tests, as well as our general English language proficiency test (ELPA).

## **POLICY ISSUE OR CONCERNS**

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The State of Oregon is required to offer a technically adequate alternate English language proficiency assessment. ALDs and cut scores are an essential element of test development, as they provide a means of interpreting student performance at the system level, helping to determine how well students are mastering content that should be part of instruction. Without ALDs and cut scores, student performance on the test cannot be reported and districts are unable to make decisions about English learner status and English language development service provision.

## **EQUITY IMPACT ANALYSIS**

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The current ELPA Summative test is not an appropriate instrument for measuring the English proficiency of students experiencing the most significant cognitive disabilities. The development of the Alt ELPA creates a more appropriate instrument that will help districts make informed decisions regarding EL status and service provision for these students. Adopting ALDs and cut scores for the Alt ELPA is the final piece necessary for districts to make decisions about retaining or exiting EL status for this student population.

## **FISCAL ANALYSIS**

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ODE has already assumed the fiscal impact for this initial work, through our test delivery and content contracts, respectively. Future costs will be for maintenance and continuous improvement of the system.

## **ATTACHMENTS**

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Attachment 1:



# Alt ELPA Standard Setting: Achievement Level Descriptor & Cut Score Adoption

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State Board of Education

Informational Presentation

June 15, 2023

ODE presenters: Dan Farley, Andrea Lockard, Ben Wolcott, & Mason Rivers

# Alt ELPA

- First administered in spring 2023
- A federally required test for students who:
  - Have EL status, *and*
  - Experience the most significant cognitive disabilities
- Results inform instruction/service provision, help with program evaluation, and determine whether the student will retain or exit EL status
  - Students who retain EL status receive English language development services and continue to test yearly on Alt ELPA
  - Students who exit EL status no longer receive English language development services or test on Alt ELPA, but are monitored for another four years

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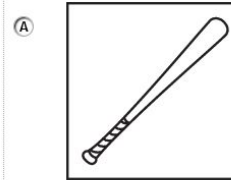
# Alt ELPA Administration

- 1:1 administration
  - Wide range of supports; highly individualizable
  - TA can help with technology and provides other support
- Four “mini-tests” with 10 questions each (Reading, Writing, Listening, Speaking)
- See the [Sample Test](#) for a preview

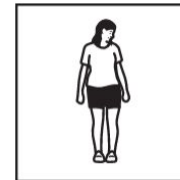
## The Surprise

Mom has a surprise for Sam. They are going to the park.

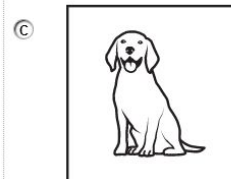
Who takes Sam to the park?



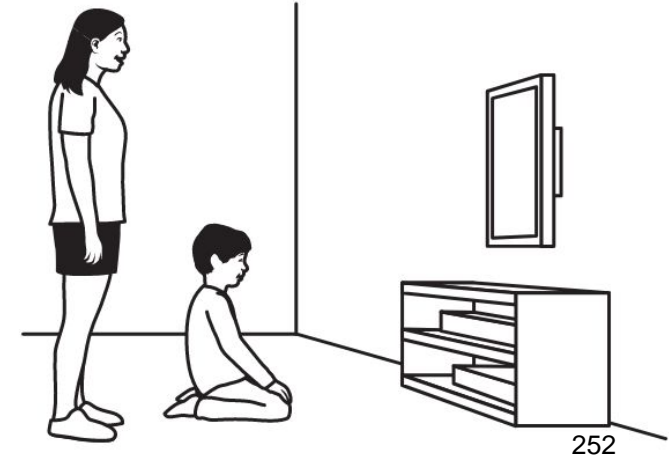
his bat



his mom



his dog



# ALDs and Cut Scores

In order to report to districts and families how students performed on the test, we need to establish performance levels, along with descriptions of what those performance levels mean.

- **Achievement Level Descriptors (ALDs)** describe the skills that a student who is performing at a certain level will demonstrate.
- **Cut scores** establish the numerical thresholds for different performance levels on the test.
- States use ALDs and cut scores to establish exiting criteria (the performance level at which a student is considered to have demonstrated proficiency in English).

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# Examples from ELPA Summative

Reading Level 3 Intermediate	Reading Level 4 Early Advanced
Score Range: 515-583	Score Range: 584-628
When reading grade-appropriate text, the student at Level 3 is working on:	When reading grade-appropriate text, the student at Level 4 is working on:
identifying key words, phrases, and main topics in texts and dialogues; responding to simple questions about key details; retelling some information, details or events; identifying reasons an author gives to support a main point; answering questions to help determine the meaning of some less frequently occurring words and phrases.	identifying main topics in texts and read-alouds; asking and answering questions about key details in written texts and read-alouds; retelling stories and information; identifying reasons an author gives to support a main point; answering questions about a variety of topics to determine the meaning of words, phrases, and simple idiomatic expressions.

Test: Grade 1 ELPA Summative, Levels 3 and 4 (out of 5 total)

**Cut Score:** the scaled score needed to be assigned to a proficiency level

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**Achievement Level Descriptor:** the verbal description of the knowledge and skills that a student performing at this level should be able to demonstrate

[Full document](#)

# Standard Setting

**When:** July 2023

**Who:** Measurement experts and educators from ELPA21 member states, including Oregon

**What:** Establish cut scores for each of the performance levels defined in the test's ALDs

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# Board Action

ODE will bring the recommendations of the standard setting panel to the State Board of Education for consideration in fall 2023.

The State Board will then vote to approve, amend, or reject the recommendations of the standard setting panel.

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# Thank You

## Office of Research, Assessment, Data, Accountability, and Reporting

**Dan Farley**, Assistant Superintendent

**Andrea Lockard**, Director of Assessment and Student Reporting

**Mason Rivers**, Special Education Assessment Specialist

**Ben Wolcott**, ELPA Specialist

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# Oregon State Board of Education

June 15, 2023

AGENDA ITEM: 8.B.

<p><b>SUBJECT:</b> Statewide Computer Science Education Implementation Plan <b>STAFF NAME &amp; OFFICE:</b> Andrew Cronk, Computer Science Education Specialist, Ken Greenbaum, Director of Digital Learning, Office of Teaching and Learning; Celia Núñez, Deputy Director, Office of Community Colleges and Workforce Development, Higher Education Coordinating Commission</p> <p>Initial update to the Board regarding the computer science initiative.</p>	<p><input checked="" type="checkbox"/> <b>Informational Presentation</b></p> <p><input type="checkbox"/> <b>Written Report</b></p>
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## BACKGROUND

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In May of 2022, former Governor Kate Brown directed the Oregon Department of Education (ODE) and the Higher Education Coordinating Commission (HECC) to develop a statewide, long-term implementation plan “to provide access to comprehensive computer science education opportunities to every public school student in this state by the 2027-2028 school year.” In her [letter to ODE and HECC](#), she writes:

*Racial, ethnic, and gender disparities in STEM education persist across the state, including gaps in access to computer science and related advanced placement courses...*

*The results of these racial and gender disparities in access to STEM and computer science courses in public schools are clear...In summary, BIPOC, tribal, and female students have the least access to high-wage, high-demand careers requiring a STEM credential or diploma.*

The directive to ODE and HECC specifies that across Oregon, computer science education is to be made available equitably and be based on national frameworks to guide students from computer users to computer literate creators.

Further, the directive states that the plan must:

- Identify immediate, practical, and systemic changes to increase students’ access to computer science education
- Include an annual, ongoing evaluation system overseen by the State Board of Education regarding the state of computer science education in Oregon
- Achieve these goals through a robust community engagement process

In response to the directive, ODE and HECC developed a strategy to ensure that robust community engagement is central to building the implementation plan. This strategy includes two phases of engagement. Phase I Engagement focused on listening to Oregonians’ experiences with computer science education, their hopes for the future of computer science education in our state, and the priorities to be considered in advance of writing the implementation plan. These voices are shared in the [Phase I Engagement Report](#), available online. After the close of Phase I Engagement, ODE and HECC formed a Consult Group of 46 students, teachers, administrators, industry professionals, community members, and representatives from higher education. Working with this Consult Group, a preliminary

# Oregon State Board of Education

June 15, 2023

AGENDA ITEM: 8.B.

set of Outcomes and Strategies have been crafted by ODE and HECC to be considered for inclusion in the implementation plan. We are currently in Phase II Engagement to gather public feedback on these preliminary recommendations.



The final Statewide Computer Science Education Implementation Plan is scheduled to be released in September 2023. Recommendations therein will likely include items requiring legislative and Board action to authorize, fund, and enact.

## POLICY ISSUE OR CONCERNS

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The study of computer science instills creativity, logical reasoning, critical thinking skills, and even a sense of wonder. It helps students strengthen collaboration skills and develop resiliency through problem-solving. It supports cross-disciplinary skills needed within and across academic and workforce contexts that apply regardless of the student’s chosen career path. Given that algorithms, artificial intelligence, and data science are increasingly used to make decisions that impact our daily lives, it is imperative that all students have access to foundational computer science education.

High-technology accounts for about 5% of statewide jobs, but due to its higher productivity and pay, the sector is 11% of overall wages paid (Source: [Oregon Office of Economic Analysis](#)). Oregon currently has 6,000+ open computing positions. However, in 2020 there were only 1,137 computer science graduates. (Source: [Code.org](#)) According to the [Oregon Employment Department](#) forecasts, the five largest core high-tech industries will grow by 15% between 2020 and 2030. In spite of the need, the current landscape of computer science education<sup>1</sup> in Oregon shows that:

- Only about 60% of Oregon high schools offer computer science courses.
- Only about 1 in 4 students currently taking a computer science course are female-identifying.
- Significant disparities exist in computer science enrollment among Latino/a/x students, English Language Learners, and students with disabilities.
- Among graduates of the Class of 2022, only about 1 in 5 students took a computer science class at any time during middle or high school.
- According to Code.org [2022 State of Computer Science Education](#), Oregon lags behind other states in adopting policies that ensure all students have equitable access to computer science education.

# Oregon State Board of Education

June 15, 2023

AGENDA ITEM: 8.B.

## EQUITY IMPACT ANALYSIS

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The purpose of this work is to both broaden participation in computer science education and ensure that all students, especially those most historically and systemically marginalized from this field of study, have access to computer science education. Furthermore, it is important not only to ensure that all students have access to computer science education but that they feel a sense of belonging in the courses and are able to participate to their fullest potential. Moving beyond access and toward participation and engagement is particularly important because even when female-identifying students and students of color do have access to computer science, they often feel unwelcome and underrepresented within the space. These inequities point to the need to think intentionally about how to create pathways for students beginning as early as pre-kindergarten.

Diversifying participation occurs when teachers are equipped with culturally responsive-sustaining pedagogy for students and the ability to strengthen a sense of belonging for all students so that they can see themselves represented within the field (both within K-12 and beyond). In addition, it involves talking about how computer science has the potential to solve problems relevant to students' lives and future opportunities (careers). Only through reaching beyond access to diversifying participation and increasing engagement can opportunities to create equity-based systemic change be realized.

Currently, to make these aspirations a reality, the following preliminary outcomes are being considered for inclusion in the final implementation plan scheduled to be released in September 2023.

- #1: Ensure All Schools Offer Computer Science Education Opportunities
- #2: Recruit, Prepare, and Retain Educators Teaching Computer Science
- #3: Establish Stable, Long-Term Funding for Computer Science Education
- #4: Align High School and Post-Secondary Requirements
- #5: Provide High-Quality Instructional Materials
- #6: Ensure Relevancy through Career Connected Learning Opportunities
- #7: Monitor and Report Progress on Computer Science Education

More detailed strategies are included in the attachment below.

## FISCAL ANALYSIS

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The Statewide Computer Science Education Implementation Plan, which will be finalized in September of 2023, will include cost estimates for the recommendations cited therein.

## ATTACHMENTS

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Attachment 1: [CS Preliminary Outcomes and Strategies](#)

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<sup>1</sup> Oregon Department of Education Administrative Data (2022)

*This document is in draft form and represents a preview for discussion and feedback purposes only. The Outcomes and Strategies shared here may or may not appear in the final plan scheduled to be released in September 2023.*



# Computer Science Education Implementation Plan

## Preliminary Outcomes and Strategies

### Forward:

This document represents some **preliminary** Outcomes and Strategies that are under consideration for inclusion in the Statewide Computer Science Education Implementation Plan, which is scheduled to be released in September 2023. These items are in **draft form** and will evolve as conversations within ODE and HECC continue and as feedback from the Phase II engagement sessions is considered. The purpose of this document is to facilitate discussion and provide direction for the process of drafting the plan. The Outcomes and Strategies shared here may or may not appear in the final plan.

### Purpose:

The purpose of the Statewide Computer Science Education Implementation Plan is to provide a roadmap to broaden participation in computer science education opportunities for Oregon's students. The Outcomes and Strategies that follow unite to support this goal.

*This document is in draft form and represents a preview for discussion and feedback purposes only. The Outcomes and Strategies shared here may or may not appear in the final plan scheduled to be released in September 2023.*

## **Outcomes and Strategies:**

<b>Outcome #1: Ensure All Schools Offer Computer Science Education Opportunities</b>
1.1 Legislate and fund the statutory or regulatory requirement that all secondary schools offer at least two computer science courses, one of which must be a foundational computer science course, by the start of the 2027-2028 school year.
1.2 Legislate and fund the statutory or regulatory requirement that all elementary schools offer computer science learning experiences at designated grade levels by the 2027-2028 school year.
1.3 Establish grant funds specifically for small schools and rural communities to engage in local projects related to computer science.
1.4 Establish grant funds to districts to support expanded learning opportunities (inclusive of summer learning, after-school learning, and learning on school breaks.)
1.5 Engage school counselors and administrators in statewide professional development about inclusive computer science design, offerings, and recruitment to computer science education.
1.6 Create a Computer Science Toolkit to guide schools through a self-assessment of existing strengths in order to identify potential learning opportunities and/or courses to consider offering while incorporating national frameworks.
<b>Outcome #2: Recruit, Prepare, and Retain Educators Teaching Computer Science</b>
2.1 Fund avenues to support racially, ethnically, culturally and linguistically diverse pre-service teacher candidates who are pursuing a teaching license and have interest/background to teach computer science classes.
2.2 - 2.3 NOTE: These strategies will explore opportunities regarding pre-service training and teacher licensure. ODE is currently in conversation with partner agencies and will provide these detailed strategies in future drafts. We recognize these are important elements to include in the plan.
2.4 Fund annual professional learning opportunities for current teachers to expand their capacity to teach computer science in a culturally responsive and sustaining way with emphasis on: <ul style="list-style-type: none"><li>● Culturally responsive and sustaining computer science</li><li>● Asset-based pedagogies</li><li>● Integrating computational thinking into core secondary classes</li><li>● Introducing computer science in elementary learning settings</li><li>● Expanding teachers' knowledge base as technologies evolve</li></ul>

*This document is in draft form and represents a preview for discussion and feedback purposes only. The Outcomes and Strategies shared here may or may not appear in the final plan scheduled to be released in September 2023.*

2.5 Hire regional computer science education coaches to support computer science instruction and new computer science teachers statewide.

**Outcome #3: Establish Stable, Long-Term Funding for Computer Science Education**

3.1 Annually fund efforts to support and expand computer science education.

3.2 Fund and authorize a permanent full-time computer science education specialist at the Oregon Department of Education.

**Outcome #4: Provide High-Quality Instructional Materials**

4.1 Establish computer science as a content area by amending the relevant statutes and regulations so that K-12 standards may be developed, materials may be adopted, and conversations with EPP’s regarding teacher preparation can commence. (Namely, ORS 329.025, 329.045, 329.451 and OAR 581-22-2000.)

4.2 Adopt K-12 standards and skill sets that integrate equity and culturally responsive computer science education throughout.

4.3 Amend OAR 581-022-2030 in such a way to initiate an instructional materials adoption process so that all Oregon schools regardless of size can take advantage of the discounts negotiated by the state.

4.4 Expand and curate computer science and related instructional materials available via Oregon Open Learning.

4.5 Curate classroom visual aids and instructional materials that are culturally sustaining and welcoming. Establish grant funds to provide these materials to classroom teachers.

**Outcome #5: Align High School and Post-Secondary Requirements**

5.1 Incentivize enrollment in computer science courses by considering ways these courses could meet existing graduation requirements in math, science or electives.

5.2 Encourage student college visits by providing grants to cover the costs of transportation and expenses related to a college visit.

5.3 Review and update as needed the Oregon community college and university transfer map.

5.4 Review current high school course offerings and create a crosswalk with introductory computer science courses at public colleges, universities and careers.

*This document is in draft form and represents a preview for discussion and feedback purposes only. The Outcomes and Strategies shared here may or may not appear in the final plan scheduled to be released in September 2023.*

5.5 Support efforts to provide virtual and in-person visits from computer science faculty and industry professionals to classrooms.

**Outcome #6: Ensure Relevancy Through Career Connected Learning Opportunities**

6.1 Develop, cultivate, and publish a list of industry partners that offer work-based learning opportunities for computer science.

6.2 Support the creation of regional Advisory Committees to support CTE programs.

6.3 Work with an industry, post-secondary, and secondary panel to ensure that computer science learning targets are evolving and aligning with technological advancements on an ongoing basis and create a plan to communicate these trends with educators throughout Oregon.

**Outcome #7: Monitor and Report Progress on Computer Science Education**

7.1 Regularly submit a report on the state of computer science education.

7.2 Create public facing data highlighting disaggregated enrollment in computer science classes statewide.

7.3 Establish a clear list of NCES course codes indicating which classes may be considered as foundational computer science classes in secondary schools.

7.4 Create a Technical Advisory Committee (TAC) to review and provide feedback on implementing the strategies described in the Implementation Plan



# Computer Science Education Statewide Implementation Plan

## Informational Update State Board of Education

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Oregon Department of Education (ODE)  
Higher Education Coordinating Commission (HECC)

# Why Computer Science Education?

- Computer science supports a well-rounded education.
- Algorithms, AI, and large data sets are increasingly used to make decisions that impact our daily lives.
- The study of computer science often affords access<sup>266</sup> and opportunity to high-wage, high-demand careers.

# Computer Science Learning Landscape

- K-12 Computer Science Courses
  - CTE Programs of Study
  - Advanced Courses (i.e. AP)
- Community College
  - 2-yr degrees
  - Stackable Credentials
- Universities & Colleges
  - 4-yr degrees
  - Advanced degrees
- Workforce Training Programs
- Summer, Out-of-School, and Career Connected Learning
- Career Connected Learning
- Industry Partnerships
- STEM Hub Network
- Community Based Organizations
- Computer Science Partner Organizations

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# CTE Computer Science High School & Postsecondary Participation

- 63 Approved CTE Programs of Study in Oregon High Schools across 53 districts.
- 18 new Start Up CTE Programs of Study in Computer Science (2022-2023).
- 19,727 high school students participated in a Computer Science CTE Program of Study (2020-2021).
- Of the 42,599 community college CTE participants enrolled during the 2021-22 academic year, 9.5% participated in a Computer Science CTE program.

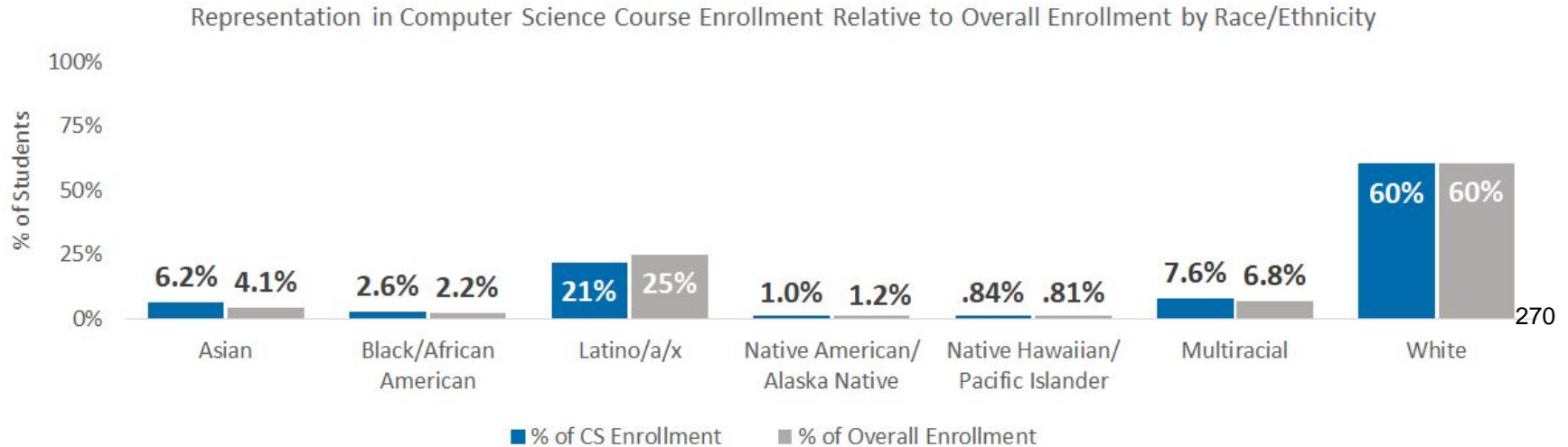
268

# Computer Science Course Access and Participation

- **22%** of students in the Class of 2022 took a computer science course at some point during middle or high school.
- Currently less than **9%** of Oregon students participate in a computer science course.
- **60%** of high schools currently offer computer science courses.
- Disparities in access and participation persist across gender, geography, race, and for students experiencing disabilities.

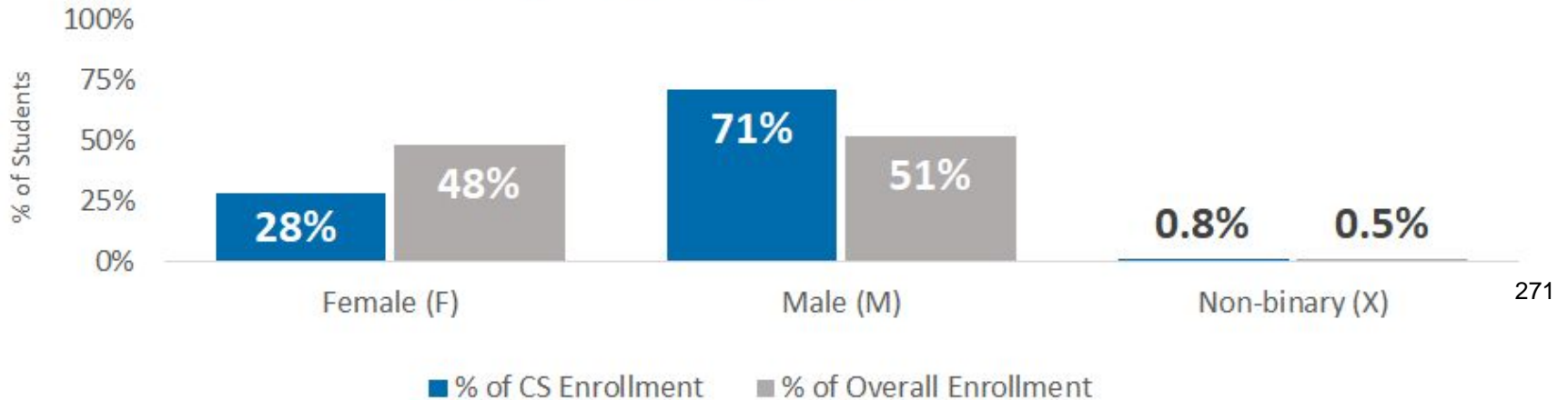
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# Disparities in Computer Science Course Enrollment in Oregon: Race & Ethnicity



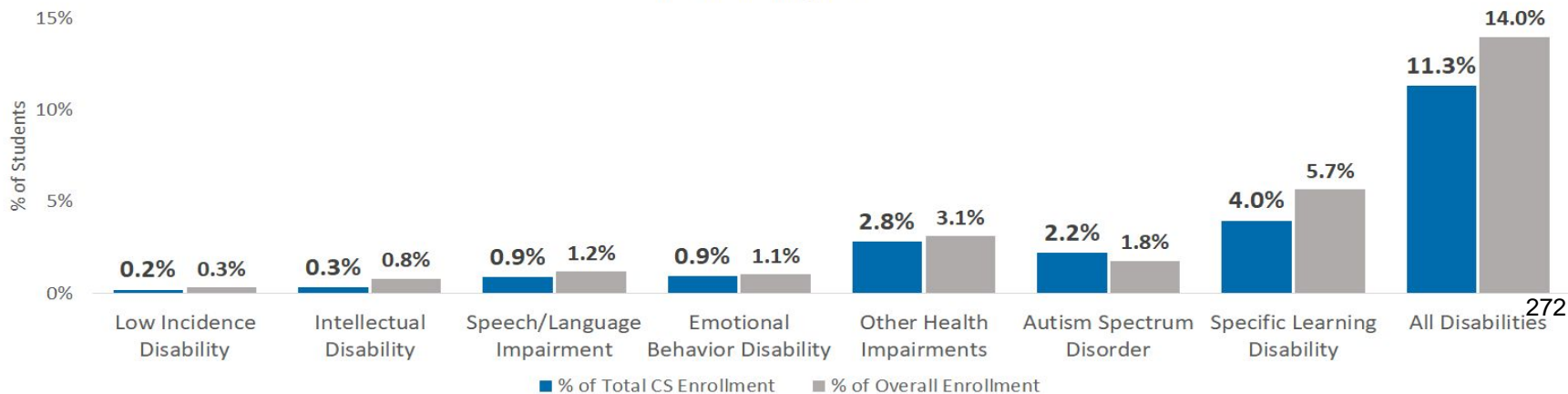
# Disparities in Computer Science Course Enrollment in Oregon: Gender

Representation in Computer Science Course Enrollment Relative to Overall Enrollment by Gender Identity in the 2021-22 School Year



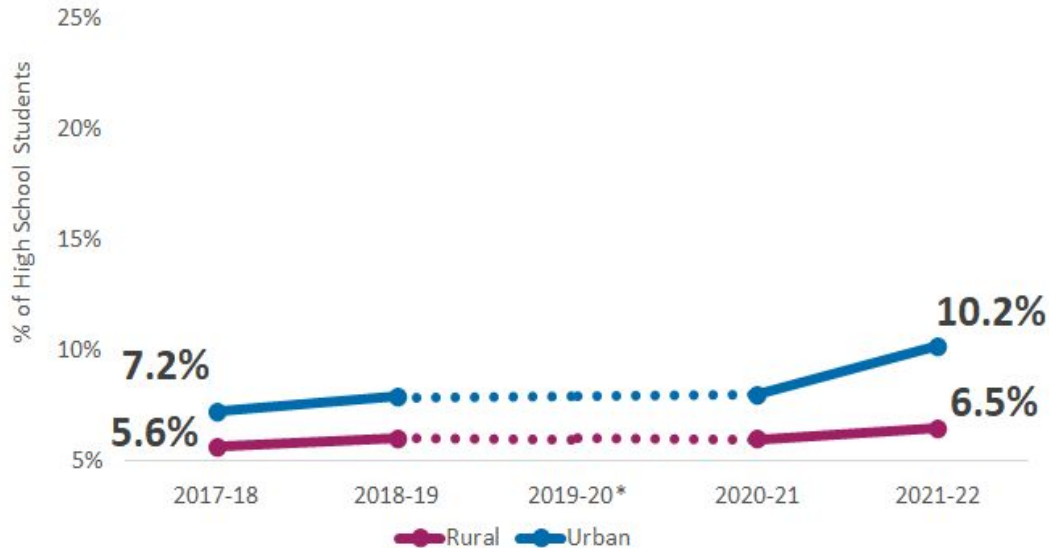
# Disparities in Computer Science Course Enrollment in Oregon: Students Experiencing Disability

Representation in Computer Science Course Enrollment Relative to Overall Enrollment by Primary Disability at Middle and High Schools



# Computer Science Participation by Locale

Percent of High School Students Enrolled in at Least One Computer Science Course by Locale



\* The data collection was cancelled in SY 2019-20 due to the COVID-19 pandemic.

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# Voices from Engagement

*“Porque es la ciencia del presente y no del futuro. Debe ser un derecho y no un privilegio.” - Padre de Oregón  
 (“Because science is from the present, not from the future. It should be a right and not a privilege.” - Oregon parent)*

*“Computer science education should be offered at all grade levels in all Oregon public schools.” - Oregon Community Member*

*“I think increasing access and participation is critical and has to be paired with any other priority goals.” - Oregon Industry Professional*

*“It is important to elevate the diverse community of practicing and historical computer scientists and professionals.”  
 - Oregon Industry Professional*

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*“The north star has to articulate equity at the center. It is not okay to have gaps in this knowledge based on gender, race, ethnicity.” - Oregon Educator*

*“I'm excited that this long overdue approach is being considered for our students Pre-K through postsecondary!” - Oregon Parent*

# Directive to ODE and HECC

- In May 2022, former Governor Brown directed ODE and the HECC to develop a statewide implementation plan for computer science education to provide access to comprehensive computer science education opportunities to every public school student in Oregon by the 2027-2028 school year. Anticipated publication in September of 2023.
- Additionally, \$6 million in GEER funds were awarded in the form of grants<sup>275</sup> to the regional STEM Hubs to increase access to computer science education opportunities statewide during the 2022-2023 school year.

# Centering Equity in the Implementation Plan

The Implementation Plan must:

- Ensure equitable access to computer science education
- Be informed by national frameworks and standards
- Align computer standards and curricula with institutions of higher education
- Identify immediate, practical, and systemic changes with a focus on equity and inclusion
- Propose an ongoing evaluation process overseen by the State Board of Education

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# Statewide Computer Science Implementation Plan: Engagement

## Phase I Engagement

December 2022 - March 2023

- 550 Oregonians
- 18 engagement sessions
- Online Survey
- Over 1,500 responses & comments

## Consult Group

March 2023 - July 2023

- 45 Members
- Student, teachers, community members, administrators, higher education representatives, and industry professionals

## Phase II Engagement

May 2023 - June 2023

- 16 engagement sessions in progress

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# Statewide Computer Science Implementation Plan: Engagement (cont'd)

## General Audience Sessions:

- Career Connected Partners - including industry professionals and those working in fields related to computer science.
- Education Partners - including teachers, para-educators, administrators, college instructors, and university professors.
- Students, Families, and Community Members

## Sessions with Specific Organizations:

- African American/Black Student Success Advisory Group
- Confederated Tribes of Umatilla
- Expanding Computing Education Pathways - ECEPs Alliance Team
- English Learners Advisory Group
- LGBTQ2SIA+ Student Success Advisory Group 278
- Oregon Advisory Council on Special Education
- Oregon Association for Comprehensive Education Conference
- Oregon Computer Science Teachers Association

# Preliminary Draft Outcomes & Proposed Strategies: Examples

- **Outcome #1:** Ensure All Schools Offer Computer Science Education Opportunities
  - **Strategy** - Legislate and fund the statutory or regulatory requirement that all secondary schools offer at least two computer science courses, one of which must be a foundational computer science course, by the start of the 2027-2028 school year
- **Outcome #2:** Recruit, Prepare, and Retain Educators Teaching Computer Science<sup>279</sup>
  - **Strategy** - Fund annual professional learning opportunities for current teachers to expand their capacity to teach computer science in a culturally responsive and sustaining way

# Preliminary Outcomes & Proposed Strategies (cont'd.)

- **Outcome #3:** Establish Stable, Long-Term Funding for Computer Science Education
  - **Strategy** - Annually fund efforts to support and expand computer science education.
  
- **Outcome #4:** Provide High-Quality Instructional Materials
  - **Strategy** - Establish computer science as a content area
  - **Strategy** - Adopt K-12 standards and skill sets
  - **Strategy** - Initiate an instructional materials adoption process

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# Preliminary Outcomes & Proposed Strategies (cont'd.)

- **Outcome #5:** Align High School and Post-Secondary Requirements
  - **Strategy** - Incentivize enrollment in computer science courses by considering ways these courses could meet existing graduation requirements
- **Outcome #6:** Ensure Relevancy Through Career Connected Learning Opportunities
  - **Strategy** - Work with an industry, post-secondary, and secondary panel to ensure that computer science learning targets are evolving and aligning with technological advancements on an ongoing basis
- **Outcome #7:** Monitor and Report Progress on Computer Science Education
  - **Strategy** - Regularly submit a report to the State Board of Education



# Thank you

Oregon Department of Education (ODE)  
Higher Education Coordinating Commission (HECC)

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# Oregon State Board of Education

June 15, 2023

AGENDA ITEM: 8. D.

<p><b>SUBJECT:</b> Oregon’s Early Literacy Framework Informational Update</p> <p><b>STAFF NAME &amp; OFFICE:</b></p> <ul style="list-style-type: none"><li>● Jennifer Patterson, Office of Teaching, Learning and Assessment</li><li>● Tenneal Wetherell, Office of Enhancing Student Opportunities</li><li>● Dan Farley, Research, Assessment, Accountability, Data and Reporting</li></ul> <p>This is an informational presentation on the purpose, background, and timeline of Oregon’s Early Literacy Framework that was released on May 30, 2023.</p>	<p><input checked="" type="checkbox"/> <b>Informational Presentation</b></p> <p><input type="checkbox"/> <b>Written Report</b></p>
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## BACKGROUND

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### Timeline

In 2009, the Literacy Leadership State Steering Committee developed Oregon’s K-12 Literacy framework in collaboration with the Center on Teaching and Learning in the College of Education at the University of Oregon. This framework was a foundational resource for many districts throughout Oregon for over a decade, and it informed key parts of ODE’s latest literacy effort.

In winter of 2021, through Elementary and Secondary School Emergency Relief (ESSER) III funding, ODE found the opportunity to invest in the revision of the literacy framework. The purpose of this revision is to develop an updated framework that is grounded in the latest scientific research on reading and writing and that centers the learning experiences of students with disabilities and multilingual learners.

On March 15th, ODE published a preview draft of *Oregon’s Early Literacy Framework* in order to provide a preliminary sense of what the final framework would look like.

On May 30th, 2023, ODE published *Oregon’s Early Literacy Framework: A Strong Foundation for Readers and Writers (K-5)*.

### Development and Engagement

In spring 2022, a cross-office ODE team convened to focus on the ESSER Literacy investment and the revision of the 2009 literacy framework. This cross-office literacy team reviewed the literacy plans from forty-seven states, and met with other state literacy leaders to learn about literacy efforts across the nation. Several components, such as the science of reading, evidence-based instruction, literacy assessment practices, infrastructure and implementation, instructional leadership and professional

# Oregon State Board of Education

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AGENDA ITEM: 8. D.

learning, language and literacy development, and high-quality instructional materials, recurred in these state literacy plans.

Through fall and winter of 2022, members of the literacy team conducted informational interviews with literacy education practitioners and professors throughout Oregon. ODE also administered an online public survey in English and Spanish through the fall and winter to hear about literacy education priorities from the public.

Based on the information gathered in the interviews, the public survey, the state scans, and the review of research, ODE staff wrote a first draft of the literacy framework. On March 15th, ODE published a preview draft of *Oregon's Early Literacy Framework* in order to provide a preliminary sense of the final framework. To increase transparency and support collaboration during the framework development process, the preview draft was posted on ODE's website and shared with focus group participants and literacy experts so they could provide detailed feedback.

The Regional Education Lab Northwest supported ODE in the development of a focus group engagement protocol to elicit specific and actionable feedback from representatives of professional, content expertise, and consultation groups, particularly those who work with students experiencing disability, multilingual learners, and those who work to advance educational equity. Some of the groups and areas of expertise engaged included: English Learner Success Plan Advisory Group, Disability advocacy groups; Dual Language Cross-District Cadre; Oregon Association of Latino Administrators; Early Learning Division Chief of Programs Group; Literacy Advocates; Coalition of Oregon School Administrators; Oregon Education Association; Oregon Association of Education Service Districts Program Directors; ESD Teaching, Learning/Curriculum Directors; ESD Special Education Directors; ESD Equity, Diversity, Inclusion Directors; Community-Based Organizations; Education System Partners. Focus groups occurred across April and included 152 participants across 21 sessions.

*Oregon's Early Literacy Framework* preview draft was also reviewed by local and national literacy experts: Dr. Barbara Foorman (a lead author of the Institute for Educational Sciences Practice Guide on early reading, working at Florida); Dr. Anita Archer (independent researcher); Dr. Rachel Bhansari (Portland State University); Dr. Julie Esparza Brown (Portland State University); Dr. Ronda Fritz (Eastern Oregon University); Dr. Claude Goldenberg (Stanford University); Dr. Amanda Kibler (Oregon State University); Dr. Audrey Lucero (University of Oregon); Dr. Dot McElhone (Portland State University). Their expert feedback along with the focus group feedback was incorporated into the final version of the framework.

Some of the **primary areas of the framework that resonated** with focus groups or literacy experts (or both) follow:

- Starting the document focused on establishing a sense of belonging for students and centering families and student experiences within the framework
- Focus on oral language as a foundational component of reading instruction and instructional practices aligned with current literacy research
- Inclusive and strength-based language and practices integrated throughout the framework
- Inclusion of a section on multilingual learners

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AGENDA ITEM: 8. D.

- Clear connections between core instruction and literacy intervention for students with disabilities
- Alignment to ODE guidance and existing literacy training in the state
- Overall readability document with regards to organization, layout, and flow

Some of the **primary revisions to the framework** that came as a result of feedback from focus groups or literacy experts (or both) follow:

- Improved connections to early learning and additional section on early learning in Oral Language section
- Dual immersion settings included
- References to “both languages” changed to “all languages”
- Reinforced the length of time it takes to acquire language proficiency
- Honored what is needed for the literacy learning for multilingual learners in monolingual settings and bilingual settings
- Resources and strategies for students experiencing disabilities lifted up as practices for all
- Practical explanations of MTSS, pre-referral processes, early identification and prevention
- Reorganized assessment into its own section
- Assessment content rewritten to be more consistent in tone to Oregon policy and the rest of the asset-based framework
- Science of reading defined
- Key terminology highlighted early in document
- More research models included (specifically the Four-Part Processing Model)
- Deeper connections made to ODE guidance
- Practical advice sections included throughout
- Content about the writing domain of literacy expanded
- More explicit connections between reading and writing

## Purpose and Vision

*Oregon’s Early Literacy Framework: A Strong Foundation for Readers and Writers (K-5)* is intended to support coherence, clarity, and common ground across the state through building shared understanding of literacy learning. In alignment with the Governor’s vision for improving literacy outcomes, *Oregon’s Early Literacy Framework* offers a north star for educators, leaders and community around what matters most in literacy instruction. It speaks to the comprehensive nature of literacy instruction and at its core, is designed to be used as a primary resource (or mentor text) for district leaders and school leaders.

The **Guiding Principles** anchor the framework, and provide a call to action for increased internal accountability and a necessary redesign of the literacy learning experience:

- **Literacy begins at birth:** The first sounds a child may hear or see (signed) are the voices of the people in their home environment, building neural pathways and serving as the initial source of

# Oregon State Board of Education

June 15, 2023

AGENDA ITEM: 8. D.

knowledge about language and their world. Families and caregivers are essential first partners in oral language development that cultivates later success in literacy and life.

- **Families and communities strengthen school-based learning:** Outside of school, children spend most of their lives at home or in the community. Parents and caregivers have a role to play in reinforcing the learning that happens at school as much as possible at home, and they must be supported as full partners in their children’s literacy development. Children’s literacy learning is deepened through their lived experiences, where language, culture, and identity are affirmed by families and caregivers who serve as important first teachers.
- **Every child is full of literary promise:** School systems and instructional practices must be designed around a fundamental belief that children can be taught to read and write, supported by high expectations and ongoing feedback. Adults must have a mindset that sees children as brimming with literary, cultural, and linguistic strengths ready to be seen and expanded.
- **Foundational skills matter:** Literacy is not possible without foundational skills, systematically taught in an organized order that builds on one another. Across the K-5 continuum, literacy instruction must explicitly and systematically build students’ foundational skills alongside the application of vocabulary, comprehension, and writing.
- **Every child must be taught to read and write:** This responsibility is met by effective literacy instruction rooted in reading and writing research; culturally responsive and inclusive practices; Oregon’s learning standards; high-quality instructional materials; and targeted support.
- **Multilingualism benefits everyone:** When families’ cultural and linguistic assets become an integral part of the instructional experience, children’s literacy skills and dispositions deepen. Culturally responsive instructional practices that serve multilingual students are proven strategies to accelerate and deepen learning for every child.
- **Educator knowledge and classroom practices are essential:** Teacher and leader professional learning must be comprehensive and designed to include training on foundational skills, oral language, writing, vocabulary, and background knowledge, as well as professional learning around culturally responsive practices and student belonging. Professional learning must be inclusive of literacy strategies that benefit students who experience disability, students with dyslexia, and multilingual learners. Educators are most successful when professional learning, time for planning and collaboration, as well as consistent encouragement and formative feedback, are present.

The framework is designed around the following eight sections that work in reciprocity with one another to help reinforce culturally responsive practice and reading science as fundamental to children’s literacy and biliteracy development.

- Section 1: Student Belonging - A Necessary Condition for Literacy Learning
- Section 2: Family & Community Partnerships
- Section 3: Oral Language as the Root of Literacy Development
- Section 4: Reading Models Based in Research
- Section 5: Foundational Skills
- Section 6: Writing, Reading Comprehension, Vocabulary, & Background Knowledge
- Section 7: Core Instruction & Assessment
- Section 8: Reaching All Learners

# Oregon State Board of Education

June 15, 2023

AGENDA ITEM: 8. D.

*Oregon's Early Literacy Framework* also draws upon the Early Literacy Playbook, which are openly licensed implementation resources, from Instruction Partners.

## SUMMARY OF PREVIOUS BOARD ACTION

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On December 4, 2009, The Oregon State Board of Education adopted the Oregon K-12 Literacy Framework as a tool to support the Essential Skill of Reading, a requirement of the Oregon Diploma.

## POLICY ISSUE OR CONCERNS

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Governor Tina Kotek has prioritized early literacy, as stated in her first Governor's Budget, released on January 31, 2023: "Children have the right to an education that will set them up for a lifetime of opportunity, but if they are not developing reading skills, it can have far-reaching impacts for the rest of their lives."<sup>1</sup>

As *Oregon's Early Literacy Framework* is not currently directed by statute or law, the development of an updated framework does not mandate changes at the school or district level. However, *Oregon's Early Literacy Framework* would impact the implementation of House Bill 3198, should it be signed into law. House Bill 3198 would establish the Early Literacy Success Initiative and would direct ODE to award grants to support literacy programs that are aligned to *Oregon's Early Literacy Framework*. Additionally, Governor's Kotek Executive Order No. 23-12 "Strengthening Educator Preparation for Literacy Instruction" calls for a new Governor's Early Literacy Educator Preparation Council. The Council will develop recommendations to revise educator and school administrator preparation program standards for literacy instruction that are aligned with *Oregon's Early Literacy Framework*.

## EQUITY IMPACT ANALYSIS

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*Oregon's Early Literacy Framework* builds momentum and capacity for strengthening belonging and literacy instruction in every elementary classroom so that all children leave elementary school proficient in reading and writing in one or more languages.

This framework delivers an approach to comprehensive literacy instruction that, if used well, will meet the strengths and needs of all students. Far too often and with far too much predictability, students in underserved focal groups in Oregon may be farthest away from literacy success due to systemic inequities, implicit bias, racism, lack of access to high quality instructional and reading materials that reflect the diversity of our students and lack of instructional opportunity. Therefore, *Oregon's Early Literacy Framework* emphasizes core instructional practices that benefit every student, with an intentional emphasis on how those practices can be leveraged to best serve students in focal groups who have historically been marginalized by education systems.

When collecting feedback on the preview draft of *Oregon's Early Literacy Framework*, ODE prioritized recruitment and scheduling for the focus groups who work with students experiencing disability, students who are multilingual, and those who work to advance educational equity.

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<sup>1</sup> [Governor's Budget: State of Oregon, 2023-2025](#), Letter from the Governor.

# Oregon State Board of Education

June 15, 2023

AGENDA ITEM: 8. D.

## FISCAL ANALYSIS

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The framework revision process was funded in part by the American Rescue Plan's Elementary and Secondary School Emergency Relief (ESSER) III, through the 10% set-aside funding for statewide initiatives. The funding came from a portion of Investment 7 of ODE's 12 equity-driven initiatives designed to address unfinished learning, support the health, safety, and mental wellness of our students and staff, and strengthen high-quality, culturally-sustaining instruction and leadership. The remainder of this investment will include the development of resources to support framework implementation.

Full implementation of the learnings in *Oregon's Early Literacy Framework* may require LEAs to invest additional resources. There could be additional fiscal costs to districts and ESDs as they support professional learning, bringing teams together to collaborate, and/or additional FTE to support district level implementation or specialized reading supports.

If the Governor's Early Literacy Success Initiative (House Bill 3198) passes the Legislature, then districts may have access to grant funding to support their implementation of literacy instruction improvements.

## ATTACHMENTS

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Slides

[Oregon's K-12 Early Literacy Framework](#)

[Oregon's K-12 Early Literacy Framework Overview](#)

# Oregon's Early Literacy Framework

A Strong Foundation for  
Readers and Writers (K-5)



OREGON  
DEPARTMENT OF  
EDUCATION

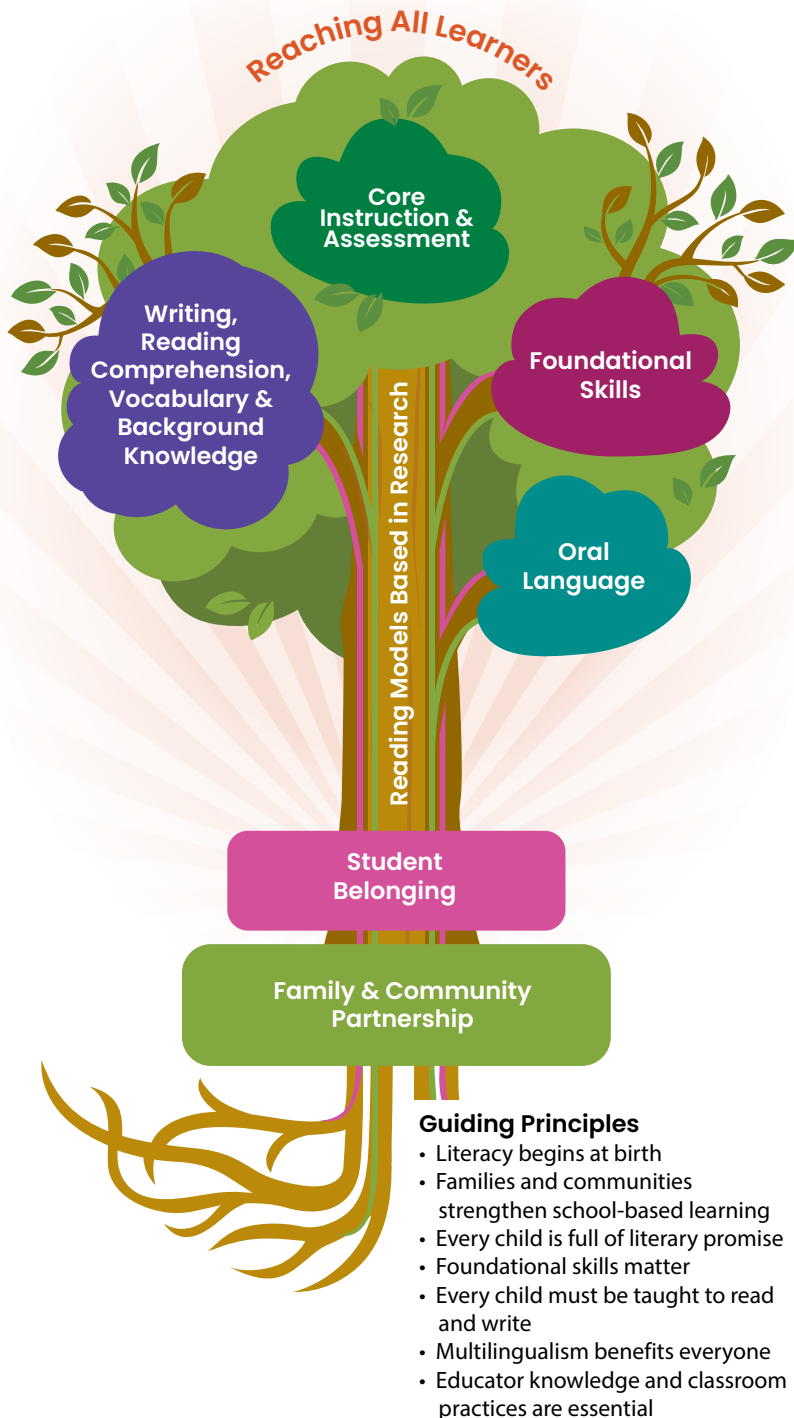
*Oregon achieves . . . together!*

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# Framework Overview



Oregon's Early Literacy Framework includes eight sections that work in reciprocity with one another to help reinforce culturally responsive practice and reading science as fundamental to children's literacy and multilingual development.

- ▶ **Section 1: Student Belonging – A Necessary Condition for Literacy Learning**
- ▶ **Section 2: Family & Community Partnerships**
- ▶ **Section 3: Oral Language as the Root of Literacy Development**
- ▶ **Section 4: Reading Models Based in Research**
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- ▶ **Section 7: Core Instruction & Assessment**
- ▶ **Section 8: Reaching All Learners**

Figure 1 reflects the reciprocal and interconnected relationship between the sections and reinforces the importance of the ways in which all sections of the framework co-exist in relationship with one another.

This framework builds momentum and capacity for strengthening belonging and literacy instruction in every elementary classroom so that all children leave elementary school proficient in reading and writing in at least one language. It speaks to the comprehensive nature of literacy instruction and underscores the complexity of learning to read and write.

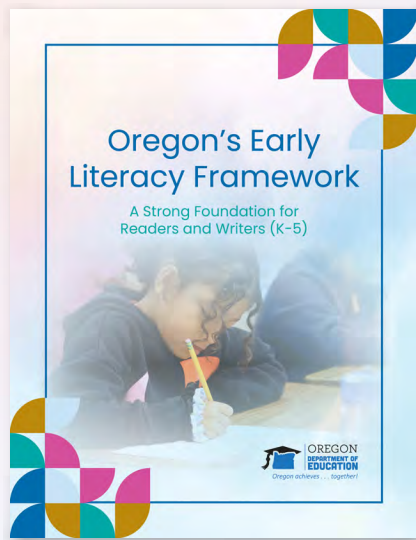
**Figure 1. Oregon's Early Literacy Framework Graphic**

This framework aims to be a foundational literacy resource (or mentor text), for K–5 classroom teachers, specialists, elementary school principals/K–8 principals, superintendents, district leaders, and education service district leaders. More broadly, it is relevant for all who are committed to seeing literacy learning maximized for every student through high-quality instruction.

# Navigating the Framework & Playbook

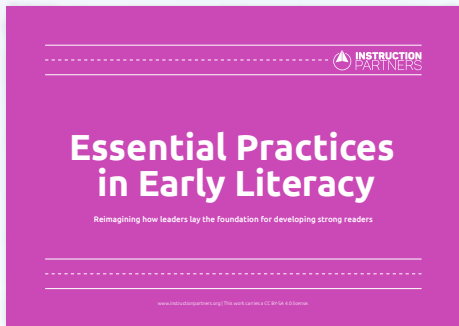
Early Literacy Framework + Early Literacy Playbook = Leading for Literacy Learning Improvement

Put simply, the framework provides the “why” and the “what” for literacy improvement, while the playbook provides the “how.”



## The Why & What

**Oregon's Early Literacy Framework** builds momentum and capacity for strengthening belonging and literacy instruction in every elementary classroom so that all children leave elementary school proficient in reading and writing in one or more languages, with as many opportunities to build on their funds of knowledge in additional languages as possible. It speaks to the comprehensive nature of literacy instruction and at its core, is designed to be used as a primary resource (or mentor text) for district leaders and school leaders. The framework is designed around eight sections that work in reciprocity with one another to help reinforce culturally responsive practice and reading science as fundamental to children's literacy and biliteracy development.



## The How

**Instruction Partners' Early Literacy Implementation Playbook<sup>1</sup>** provides ready-to-use, step-by-step guidance. Early literacy leaders and educators can use this playbook to strengthen and monitor literacy development in their school or system, whether building the essential implementation practices from scratch or tuning up what they already have in place.

Overall, the playbook aligns closely with the content of Oregon's Early Literacy Framework, with a few exceptions. As is true when using any resource, there will be opportunities for calibration and potential adaptations. For example, while the playbook indicates K-2, it can (and should) be easily adapted for K-5.

The playbook is organized around five essential implementation practices<sup>2</sup> (Vision, Materials, Data, Team, Time) in early literacy and includes workbooks for four phases of work designed to follow a three-five year arc of deep literacy strategy and implementation.

1 [Instruction Partners, 2021a](#)  
2 [Instruction Partners, 2021b](#)

# Key Terminology

While an extensive [glossary](#) lives at the end of this framework, these key terms are highlighted at the beginning of the framework to provide clarity and reinforce shared meaning-making.

## CORE INSTRUCTION

**Core instruction:** high-quality instruction in the general education setting that is aligned to grade-level standards, centered around grade-level-aligned materials, and inclusive of every student in the classroom, regardless of performance level.<sup>3</sup> Sometimes also referred to as Tier I Instruction, this is the primary prevention for reading and writing difficulty. It maximizes learning by providing access to peer learning models, the classroom teacher, and grade-level aligned texts and tasks.

## CULTURALLY RESPONSIVE

**Culturally responsive:** the implicit recognition and incorporation of the cultural knowledge, experience, and ways of being and knowing of students in teaching, learning, and assessment. This includes identifying, valuing, and maintaining a high commitment to students' cultural assets in instruction and assessment; diverse frames of reference that correspond to multifaceted cultural perspectives/experiences; and behaviors in the classroom that can differ from White-centered cultural views of what qualifies as achievement or success.<sup>4</sup>

*Note: The term “culturally responsive practices” centers the importance of affirming students’ intersectional cultural identities. However, there are other terms and bodies of research that are important to uplift: culturally sustaining pedagogies, linguistically responsive instruction, and culturally relevant pedagogy. While each of these terms and bodies of research vary in their definitions (see the glossary for a full definition of each), they all reinforce the importance of creating and cultivating a learning environment where students feel seen, heard, and valued – where students know they belong and can show up and learn as their full and authentic selves.*

## EARLY LITERACY

**Early literacy:** skills outlined by Oregon’s English Language Arts and Literacy Standards for grades K–5, inclusive of reading foundational skills (e.g., print concepts; phonological awareness; phonics, decoding, and word recognition; fluency); comprehension; language and vocabulary; writing; speaking and listening. These standards reflect the literacy skills and knowledge that begin developing before students enter kindergarten and lay a foundation for more advanced literacy development in later grades.

## EVIDENCE-BASED LITERACY PRACTICES

**Evidence-based literacy practices:** instructional practices with a proven record of success based on reliable, trustworthy, and valid evidence that when implemented with fidelity result in adequate gains in literacy achievement for students.<sup>5 6</sup>

## FOCAL STUDENT GROUPS

**Focal student groups:** students of color; students experiencing disabilities; emerging bilingual students; students navigating poverty, homelessness, and foster care; and other students who have historically experienced disparities in our schools.<sup>7</sup>

3 [Bowen, 2021](#)

4 [ODE, n.d.-a](#)

5 [Dyslexia-Related Training: Definitions, 2018](#)

6 ODE defines evidence-based in a range of ways given the complex bodies of work across the K-12 system.

7 [Oregon Department of Education \(ODE\), 2022c](#)

## MULTILINGUAL LEARNER

**Multilingual learner:** a student who, by reason of foreign birth or ancestry, speaks or understands languages other than English, speaks or understands little or no English, and/or requires support in order to become proficient in English.<sup>8</sup> “Multilingual learner” is used intentionally to promote multiliteracy and honor the process of language and literacy development in two or more languages. While English Learner is the formal term used most often in K–12 policy, this term is inadequate and reinforces a deficit view of multilingual students. To reinforce the cognitive benefits of multilingualism and the importance of neutralizing language status, additional terms (such as multilingual learners and emergent bilinguals<sup>9</sup>) bring an asset orientation necessary to ensure children are valued for the language(s) developed in their home and community context.

*Note: Oregon’s Early Literacy Framework is primarily written from the lens of developing literacy for multilingual learners within an English instructional model. Wherever possible, best practices for multilingual learners participating in dual language education with biliteracy as the intended outcome is incorporated throughout the framework. With the understanding that best practice for supporting multilingual learners’ literacy development is to build upon their linguistic repertoire through multilingual instructional programs such as dual language education, the current reality is that the majority of multilingual learners in Oregon are developing literacy within English instructional programs.*

## RESEARCH-BASED LITERACY PRACTICES

**Research-based literacy practices:** models, theories, and practices that are based on the best research available in the particular field of study. These practices differ from evidence-based in that they have not been researched in a controlled setting to measure efficacy.

## SCIENCE OF READING

**Science of reading:** research that is aligned with “neurological and cognitive science studies of how brains process written words<sup>10</sup>,” and includes a broad collection of research from multiple fields of study including cognitive science, learning sciences, literacy research, and instructional science and research broadly.<sup>11</sup>

*Note: Within Oregon’s Early Literacy Framework, this definition of the science of reading reinforces the essential role it plays in informing literacy instruction. Reading research provides fundamental information about reading and it deserves to be recognized as such. Furthermore, it underscores the complexity and richness of literacy instruction. Amanda P. Goodwin, co-editor of the academic journal Reading Research Quarterly, describes the science of reading as: “not just phonemic awareness, phonics, reading fluency, vocabulary, and comprehension but also language development, motivation, dyslexia, the reading of digital texts, multilingual literacy, the literacies of Black students and other historically minoritized student groups...”<sup>12</sup>*

*Ultimately, the term “science of reading” can be interpreted in divisive ways or in informative ways; the goal in this framework is to use the science of reading as a term to bring clarity and common ground to move Oregon forward in supporting the literacy development of all students.*

See [Appendix C: Glossary](#) for additional terms.

8 [NYSED, 2019](#)

9 [García, 2009b](#)

10 [Shanahan, 2021](#)

11 [National Center on Improving Literacy, 2022](#)

12 [Heller, 2022](#)

# Introduction & Purpose

When a child first comes to school, they arrive brimming with literary and linguistic strengths that are ready to be seen and expanded. Children begin literacy learning in their homes and communities, where language, culture, and identity are affirmed by families and caregivers who serve as important first teachers and storytellers. Students' accumulated familial, cultural, and linguistic experiences, or funds of knowledge,<sup>13</sup> serve as the foundation for building rich literacy skills and experiences and finding deeper joy, meaning, and purpose in the larger world.

"Literacy is inseparable from opportunity, and opportunity is inseparable from freedom. The freedom promised by literacy is both freedom *from*—from ignorance, oppression, poverty—and freedom *to*—to do new things, to make choices, to learn."

Koichiro Matsuura

Children need literacy instruction that guarantees proficiency, addresses individual strengths and needs, and provides learning conditions and content exposure that honors linguistic and cultural assets and lived experiences. The significance of literacy cannot be overstated; it has been described as a social determinant of health, with literacy deficits leading to lifetime impacts.<sup>14</sup> Oregon's Early Literacy Framework emphasizes core instructional practices that benefit all students, with an intentional emphasis on how those practices can be leveraged to best serve students in focal groups who have historically been marginalized by education systems.

This framework delivers an approach to comprehensive literacy instruction that, if used well, will meet the strengths and needs of all students. Far too often and with far too much predictability, students in underserved focal groups in Oregon may be farthest away from literacy success due to systemic inequities, implicit bias, racism, lack of access to high quality instructional and reading materials that reflect the diversity of our students and lack of instructional opportunity.

<sup>13</sup> Moll et al., 1992 (see [Appendix C: Glossary](#))

<sup>14</sup> Hutton et al., 2021

To nourish our children in ways that lead to literary empowerment requires collective commitment. From the local library to Relief Nurseries, community partners to child care providers, preschools to higher education, local businesses to teacher preparation programs, and elders to neighbors: literacy is a community commitment. Moreover, the Oregon Department of Education, education service districts, school districts, and public charter schools hold an essential responsibility to ensure every child in Oregon reads and writes with confidence and competence in at least one language.

To realize this promise, significant strides are needed to improve the quality of literacy instruction and to ensure the experience of belonging in classrooms. This means ensuring that every student receives classroom instruction aligned to grade-level standards and scaffolded for their success (see [Appendix B: Companion Guidance Documents & Resources](#)) and informed by research and culturally responsive practices, and cultivating and strengthening community partnerships and family engagement to meet students' strengths and individual needs.

#### THE CORE PURPOSE OF THIS FRAMEWORK IS TO:

- Build statewide coherence, clarity, and common ground.
- Fuel action and improvement.
- Support districts and schools in the implementation of a comprehensive literacy vision and plan.
- Serve as a shared north star for educators, leaders, and community, in alignment with the Governor's vision for improving student literacy outcomes.

In support of strong readers, writers, and thinkers, Oregon's Early Literacy Framework provides a statewide call to action, and lays out a research-based instructional vision including the essential building blocks for K-5 educators to grow every student's literacy skills. At its heart, Oregon's Early Literacy Framework is intended to build momentum and capacity for strengthening belonging and literacy instruction in every elementary classroom so that all children leave elementary school proficient in reading and writing in one or more languages, with as many opportunities to build on their funds of knowledge in additional languages as possible.

The following Institute of Education Sciences, "What Works Clearinghouse" Practice Guides informed the development of Oregon's Early Literacy framework.

- [Foundational Skills to Support Reading for Understanding in Kindergarten Through 3rd Grade](#)
- [Improving Reading Comprehension in Kindergarten Through 3rd Grade](#)
- [Preparing Young Children for School](#)
- [Teaching Academic Content and Literacy to English Learners](#)
- [Assisting Students Struggling With Reading: Response to Intervention \(RtI\) and Multi-Tier Intervention in the Primary Grades](#)
- [A First Grade Teacher's Guide to Supporting Family Involvement in Foundational Reading Skills](#)
- [Teaching Elementary School Students to Be Effective Writers](#)

# Guiding Principles

Persistent opportunity gaps in nearly all aspects of our educational system invite a collective interrogation of the beliefs and mindsets that underlie student learning outcomes. The Guiding Principles in this framework provide a call to action for increased internal accountability and a necessary redesign of the literacy learning experience.

The following guiding principles anchor Oregon's Early Literacy Framework:

- **Literacy begins at birth:** The first sounds a child may hear or see (signed) are the voices of the people in their home environment, building neural pathways and serving as the initial source of knowledge about language and their world. Families and caregivers are essential first partners in oral language development that cultivates later success in literacy and life.
- **Families and communities strengthen school-based learning:** Outside of school, children spend most of their lives at home or in the community. Parents and caregivers have a role to play in reinforcing the learning that happens at school as much as possible at home, and they must be supported as full partners in their children's literacy development. Children's literacy learning is deepened through their lived experiences, where language, culture, and identity are affirmed by families and caregivers who serve as important first teachers.
- **Every child is full of literary promise:** School systems and instructional practices must be designed around a fundamental belief that children can be taught to read and write, supported by high expectations and ongoing feedback. Adults must have a mindset that sees children as brimming with literary, cultural, and linguistic strengths ready to be seen and expanded.
- **Foundational skills matter:** Literacy is not possible without foundational skills, systematically taught in an organized order that builds on one another. Across the K-5 continuum, literacy instruction must explicitly and systematically build students' foundational skills alongside the application of vocabulary, comprehension, and writing.
- **Every child must be taught to read and write:** This responsibility is met by effective literacy instruction rooted in reading and writing research; culturally responsive and inclusive practices; Oregon's learning standards; high-quality instructional materials; and targeted support.
- **Multilingualism benefits everyone:** When families' cultural and linguistic assets become an integral part of the instructional experience, children's literacy skills and dispositions deepen. Culturally responsive instructional practices that serve multilingual students are proven strategies to accelerate and deepen learning for every child.
- **Educator knowledge and classroom practices are essential:** Teacher and leader professional learning must be comprehensive and designed to include training on foundational skills, oral language, writing, vocabulary, and background knowledge, as well as professional learning around culturally responsive practices and student belonging. Professional learning must be inclusive of literacy strategies that benefit students who experience disability, students with dyslexia, and multilingual learners. Educators are most successful when professional learning, time for planning and collaboration, as well as consistent encouragement and formative feedback, are present.



# Section 1: Student Belonging – A Necessary Condition for Literacy Learning

While evidence-based, systematic, and explicit literacy instruction is foundational for students' literacy success, research also tells us that equally important are the conditions in which this teaching and learning takes place. Building inclusive and supportive environments in schools is essential to growing readers and writers. This is a shared responsibility for all staff members. School leaders set the tone so that classroom teachers, specialists, and support staff can successfully build such environments. We must be all in to create the conditions for students to thrive.

For children to thrive, they need a sense of belonging and safety. When children experience belonging at their school, they are not only more engaged and more motivated to learn, but they are also likely to take risks in their learning and experience higher academic achievement.<sup>15</sup> Children keenly perceive how others receive them within their school environments and whether their ways of knowing, speaking, being, and learning are affirmed and reflected at school. They know and can feel when they are taught by educators who believe they can learn at high levels and when they are provided with learning opportunities that honor their language, community, and culture.

“Belonging is a fundamental human need. People search for a sense of connection with the people and places in their lives. Students spend a huge portion of their time during childhood and adolescence at school, which makes it essential that the learning environment cultivates a sense of belonging for students. A recent review by Kelly-Ann Allen and her colleagues of the academic research on belonging found evidence of our need to connect embedded in our genetic code.”

Ralph, 2022



<sup>15</sup> [REL Northwest, 2018](#)

# Culturally Responsive Practices

Culturally responsive practices are research-based approaches that provide learning environments that foster belonging and enable students to see the relevance of reading and writing in their own lives.<sup>16</sup> When students are in an environment that incorporates culturally responsive practices, they see themselves in the learning and in the curriculum, providing experiences that affirm their culture, home language, lived experiences, and identity as assets to be sustained, not erased and replaced.<sup>17</sup>

“Reading science has shown us what needs to be amplified in early reading, but for this practice to be equitable for students, we must also address the how. ... To implement foundational skills programs equitably, we also must ensure that in addition to holding high expectations for all students that all students have access to a full range of supports, culturally relevant content and practices, and aligned instructional materials.”

Pimental & Liben, 2021

School leaders who implement culturally responsive practices design school-wide systems and environments to support and learn alongside staff to deliver culturally affirming instruction. Educators who use culturally responsive practices believe that all students are capable of reading and writing and they align literacy instructional practices, text selections, and formative assessment approaches with what they know about their students. As such, culturally responsive practices require support and time for educators to explore how their perspectives and lived experiences shape decisions that influence student learning. Educators who embrace culturally responsive practices take time examining their own identities and biases. Anchored in a deep belief that all students can engage in meaningful and connected literacy, culturally responsive teachers value their students' identities, including their race, ethnicity, ability, gender, home languages, religion, and lived experiences.

Children come to school in their full humanity (inclusive of but not limited to their culture, race, ethnicity, gender identity, language, ability, sexual orientation, and religion). If educators and school systems see students through a single lens, they are only seeing a partial picture of students' lived experiences. For students to feel known, it is important that educators learn to see and acknowledge students' intersectional identities, especially when they do not reflect the dominant culture. When educators understand and reflect on their own identities and teach about identity and intersectionality,<sup>18</sup> they are more likely to embrace students' multiple identities and recognize that a single social identity does not fully represent or define a child. Culturally responsive teaching creates the experience of belonging as the neurobiologically vital state in which each student becomes available for the work of learning as well as utilizing instructional strategies to build the intellectual capacity to apply that learning in academic contexts. Educators who attend to cultural frames for information processing help to simultaneously reinforce learning and belonging. This may include, for example, using call and response, rhythm, music and storytelling as central practices in literacy acquisition. Instruction and engagement are maximized when educators leverage what they know about a child and honor their intersectional identities – this has the potential to fundamentally shift access to literacy learning.<sup>19</sup>

16 Hammond, 2015

17 Gay, 2018

18 Crenshaw, 1989

19 Gay, 2018

## High Expectations with Responsive Support

An essential tenet of culturally responsive practice is that educators hold consistently high expectations for every student, accompanied by responsive support. In literacy environments, this means providing all students, including students experiencing disabilities and multilingual learners, with access to grade-level standards,<sup>20</sup> texts, tasks, and experiences while also providing robust support for students to grow.

When educators use culturally responsive practices, they see each child’s brilliance and potential; they believe all students are capable of academic success.<sup>21</sup> These educators have been described as “warm demanders,” a term to describe an educator who expects a great deal from their students while also conveying warmth, care, and unconditional acceptance.<sup>22</sup>

In literacy instruction, this means explicit modeling of skills with ample scaffolding and practice that provides students with the tools they need to reach grade-level literacy learning goals. While instructional strategies may vary, the message in the approach to teaching with high expectations and high support is the same: every child in the classroom can achieve at high levels and participate in the cognitive richness and joy that comes from robust literate experiences.

Culturally responsive teaching means teaching with students’ “academic prowess” at the center. Zaretta Hammond describes this as changes in instruction that actually increase students’ cognition. This involves teacher expectations of student achievement, teacher comfort with challenge and productive struggle, and intentional partnership with families toward the acquisition of skills. In this way, culturally responsive instruction requires changes in instruction that actually increase student’s cognition and scaffold every child’s ability to develop stamina for problem solving and practice with synthesis and analysis of content.<sup>23</sup>

## Diverse Texts<sup>24</sup>

Culturally responsive literacy instruction includes the selection of a high-quality literacy curriculum and supplemental materials that include characters, settings, and authors which are reflective of the abilities, identities, and cultures of the full range of students and their communities. When curriculum and materials reflect and honor student identity, home languages, and culture, they contribute to a welcoming and affirming classroom environment. Throughout early literacy, concepts and characters in culturally and linguistically diverse texts also provide opportunities for students to engage in discussions about numerous topics, including their culture and identity, as well as to explore power dynamics in society and to consider how choices affect others.<sup>25</sup> This exposure encourages reflection and connection through the exploration of language, including writing, which can build relationships while inviting the understanding of someone else’s perspective.

“Seeing ourselves in stories and other texts is a powerful human need. Being able to say, ‘Look, there I am!’ feels good. It helps us know that who we are is recognized and validated and that we are not alone.”

National Council of Teachers of English, 2021

20 ODE, n.d.-g

21 [Krasnoff, 2016](#)

22 Delpit, 2013; and Hammond, 2014

23 Hammond, 2015

24 Aukerman & Chambers Schuldt, 2021

25 Schlund, 2019

Culturally responsive instruction in literacy builds awareness of various perspectives, addressing the experiences of diverse populations, while also exposing and disrupting negative stereotypes that may be present in materials. When reviewing early literacy curricula and supplemental materials, it is important to go beyond superficial representation and to carefully avoid common biases in materials that can include harmful stereotypes. Oregon’s English Language Arts instructional materials evaluation tool<sup>26</sup> as well as the Culturally Responsive Curriculum Scorecard Toolkit from New York University<sup>27</sup> are resources to support the review and evaluation of literacy curriculum materials. Each of Oregon’s Student Success Plans (African American/Black, American Indian/Alaska Native, Latino/a/x & Indigenous, and LGBTQ2SIA+)<sup>28</sup> reference the importance of culturally responsive curriculum as part of their plans.

“Books are sometimes windows, offering views of worlds that may be real or imagined, familiar or strange. These windows are also sliding glass doors, and readers have only to walk through in imagination to become part of whatever world has been created or recreated by the author. When lighting conditions are just right, however, a window can also be a mirror. Literature transforms human experience and reflects it back to us, and in that reflection we can see our own lives and experiences as part of the larger human experience. Reading, then, becomes a means of self-affirmation, and readers often seek their mirrors in books.”

Bishop, 1990

## Social and Emotional Learning

Children learn best when they are part of a positive school climate where everyone feels and is safe, seen, valued, and respected: when an asset-based orientation permeates teacher-student interactions and informs instructional decisions. Social and emotional learning<sup>29</sup> advances educational equity and excellence through authentic school-family-community partnerships that establish culturally responsive learning environments and experiences. Implementing social and emotional learning in schools creates caring, just, and affirming environments that support student learning.<sup>30</sup> Using this approach during early literacy instruction promotes student voice and agency, fosters well-being, and dedicates time and space for students to make sense of their learning and experiences. Centering the transformative social and emotional learning<sup>31</sup> constructs of identity, agency, belonging, curiosity, and collaborative problem-solving throughout students’ literacy development can provide rich context and conditions for authentic student engagement.

Incorporating culturally responsive practices and social and emotional learning are more than strategies to create the necessary conditions for student learning to flourish: they are the epitome of belonging. Classrooms with culturally and linguistically affirming learning environments, where children are encouraged and challenged, provide the most fertile soil for reading, writing, speaking, and listening to occur. The classroom centering social-emotional learning offers young learners the opportunity to take risks, consider their own learning strategies and engage in academic discourse with their peers. The necessary energy to engage and persist with challenging material is exponentially increased when that energy is fed by peer-to-peer engagement and reflective practice.

26 [ODE, 2018b](#)

27 [The Education Justice Research and Organizing Collaborative \(EJ-ROC\), 2020](#)

28 [ODE, n.d.-b](#)

29 [ODE, n.d.-e](#)

30 Durlak et al., 2011; Greenberg, 2023

31 [CASEL, n.d.](#)

### KEY TAKEAWAYS

- Belonging is a baseline condition for risk taking, thereby rendering it a nonnegotiable prerequisite for classrooms that maximize learning.
- Culturally responsive practice centers mutual relationship and care as conditions that foster a sense of belonging. “I am seen as unique and I am a part of a whole community.”
- Culturally responsive practice requires study and reflection regarding identities and cultural reference points brought to the classroom by BOTH educators and students.
- The culturally responsive educator sees and learns about each member of the classroom community. Culturally responsive literacy practice invites students' identities and cultural reference points into the daily rhythm, literacy content, strategies and discourse of the classroom.
- Culturally responsive practice provides literacy instruction centering access for all children to the experience of, and practice with, the full range of literacy skills: phonemic awareness, explicit systematic phonics, vocabulary and language development, comprehension and fluency.
- High expectations for literacy success requires time and support for educators to repeatedly examine biases as they work to ensure literacy engagement, growth and achievement for every child.
- Every child deserves access to grade-level standards. Grade-level expectations are made doable when teachers know children well enough to both set challenges and scaffold challenges through partnership with students and families.
- Maximizing literacy learning includes providing rich and complex texts inviting children to both see themselves and learn about others.
- The social and emotional skills and context provided in the classroom allow children to practice peer-to-peer listening and speaking and normalizes the “risk, fail, try again” stamina that supports literacy achievement.

### LEARN MORE

- [The Science of Reading is Culturally Responsive](#)
- [Ready for Rigor: A Framework For Culturally Responsive Teaching](#)
- [Culturally Responsive Instruction for Native American Students](#)
- [Culturally Responsive Literacy Resources](#)
- [Supporting Gender Expansive Students \(from ODE\)](#)
- [Transformative SE \(from ODE\)](#)
- [Oregon's Student Success Plans \(from ODE\)](#)

# Section 2: Family & Community Partnerships

Parents and families are the first, most important teachers in a child’s life. Before a child learns to read and write, they learn to listen and speak. Literacy learning starts at home in a child’s first three years of life – in the lap of a trusted and caring adult. Brain science tells us that children are developing these skills from birth, which is why support for children to gain early literacy skills is absolutely critical even in the first few years of life – long before they enter preschool or kindergarten.

Preschool and kindergarten-aged children learn best through intentionally planned activities and meaningful play that provides ample opportunities to explore and discover. As noted in Oregon’s Early Learning and Kindergarten Guidelines, “providing these opportunities does not preclude academics, but rather enhances the delivery of academic content through means that are most effective for young children. This approach is often referred to as developmentally appropriate practice.”<sup>32</sup>

Across almost every facet of literacy development, support and collaboration with families, tribes, and community-based organizations strengthens student literacy development and serves as accelerators for student success.<sup>33</sup> When planning how to support early literacy, it is important to consider questions such as, “How do we leverage the skills, capacities, and strengths within our community as we design learning experiences that meet the needs of our learners?” and “How might we support parents and caregivers as essential partners in their children’s literacy learning?”

This section is intended to provide guidance to district and school leaders and classroom educators to guide approaches to partnering with families regarding early literacy. It is not intended to be a comprehensive guide for community-based organizations or sovereign tribal nation leaders on how to support parents with literacy. These purposes will be met, instead, by tools that are co-created by communities for the communities they intend to serve.



<sup>32</sup> [ODE, 2017, p. 4](#)

<sup>33</sup> Dearing et al., 2004; Cronan et al., 1999

# Literacy Starts at Home

Language development is increasingly understood as a process that begins during infant brain development. This development is connected with oral language in any language, and it may be impacted by genetic, medical, and environmental factors.<sup>34</sup> The human brain is hardwired for language development.

Language development occurs before and alongside literacy development, in home environments, and throughout children’s daily experiences, including play and storytelling in the context of family traditions, first language, and culture. Engaging in conversations, over a shared meal, in the car, or in other settings, singing, cooking together, growing and harvesting food, and reading and telling stories, can help children develop oral language skills as listeners and speakers. Intentional literacy engagement before kindergarten lays the groundwork so that elementary school instruction can then advance. For multilingual learners, language development in a child’s home language in addition to English, supports both language acquisition and brain development.

Families and caregivers want their children to succeed and are one of the most important allies in advancing student learning. When families, caregivers, and communities are mobilized to support literacy learning, they can serve as champions to advocate for striving students, while creating more consistent, coordinated efforts to boost student learning.<sup>35</sup>

Together families and educators can leverage evidence-based early literacy practices inside and outside the classroom.<sup>36</sup> Engagement with books and opportunities to write and draw from an early age promotes excitement about reading and writing.<sup>37</sup> The positive interactions that young children have when they read with adults and see adults engaged in authentic reading and writing increases their motivation to read and write more.

Many evidence-based practices in support of early literacy begin at home and in early learning settings. For instance:<sup>38</sup>

- Regular, intentional, engaging practice focused on social-emotional skills.
- Strengthening children’s executive function skills using specific games and activities.
- Planned activities to build children’s vocabulary and language.
- Building on children’s knowledge of letters and sounds.
- Use of shared book reading to develop children’s language, knowledge of print features, and knowledge of the world.

34 Hutton et al., 2021

35 [Regional Education Laboratory Pacific, 2015](#). For more information about effective home-school partnerships and family engagement see Mapp & Kuttner, 2013; Epstein et al., 2018

36 [Caspé & Lopez, 2017](#). For more information on early literacy evidence-based practices at school and at home, see [Shibre, 2021](#).

37 [Michigan Department of Education, 2021](#)

38 Foorman, Lee, & Smith, 2020

## Literacy Learning Before Kindergarten

Paying attention to the literacy and learning that happens prior to children entering kindergarten ensures that children have a more seamless transition to kindergarten. Oregon’s Early Learning and Kindergarten Guidelines<sup>39</sup> are an integral resource for schools, districts, and families to consider when planning for literacy and learning before and up through kindergarten. The guidelines include a continuum of development and learning in five domains: approaches to learning, social–emotional development, language and communication, literacy, and mathematics. The guidelines are designed to:

- Align Oregon’s existing preschool guidelines and kindergarten standards and clarify the learning progressions from early childhood to elementary school.
- Support all adults who work with children by showing the progressions of what children know and are able to demonstrate in early childhood,<sup>40</sup> at kindergarten entry, and at the end of kindergarten.
- Provide caregivers with information on developmental milestones. Caregivers can use this information to provide experiences that support children’s learning and development.
- Provide a framework for early education and care providers to plan high-quality facilitated play and individualized instruction and support services.
- Inform family engagement and professional development regarding the learning and development of children.
- Strengthen the relationship between early learning and K–12 so that schools are ready for children and children are ready for school.

## Supporting Literacy Through Expanded Learning

Parents and caregivers have a role to play to supplement and reinforce the literacy learning that happens at school as much as possible at home. To create those conditions, it’s natural for parents and caregivers to need and want support, tools, and information, including knowledge of their child’s strengths and needs from educators’ perspectives. This knowledge and communication about their child helps parents make informed decisions and ensures they are empowered to support their child’s literacy development before school, after school, and during the summer.

### The Role of Libraries

Public libraries and school libraries are an integral component of children’s literacy development. Extensive research supports the role school libraries<sup>41</sup> play in the health and success of the school community.<sup>42</sup> A well-equipped library, staffed by a full-time, certified teacher-librarian, contributes significantly to gains in student learning.<sup>43</sup> High-quality school libraries staffed by trained librarians not only help students read more, but they also help them learn how to use and process information and to perform better on achievement tests.<sup>44</sup> Levels of library funding, staffing levels, collection size and range, and the librarian’s instructional role all directly impact student achievement, regardless of student socioeconomic status.

39 [ODE, 2017](#)

40 For more information on learning development for children ages birth to five, see [Early Childhood Learning and Knowledge Center, 2022](#)

41 [Oregon Library Association, n.d.](#)

42 [Library Research Service, 2013a](#)

43 [Library Research Services, 2013b](#)

44 [Lance & Kachel, 2018](#)

One purpose of school libraries is to provide access to books, with research confirming that access is associated with raising student test scores in all aspects of literacy.<sup>45</sup> Access to culturally relevant and responsive books fosters an early love of learning and a sense of belonging while also positively affecting reading achievement and appears to offset the impact of poverty. This research points to the importance of ensuring that all students, no matter their socioeconomic status, have equitable access to library resources because all aspects of literacy improve when children have access to books.<sup>46</sup> With reliable access to diverse books, students are more likely to read them and to read them for longer periods of time. School libraries can bridge the opportunity gap for students from historically and systemically marginalized communities by providing equal access and resources for learning through culturally relevant and responsive books and instructional materials. Cultivating a library that is welcoming and creates an enriching learning environment ensures that students have ready access to culturally relevant and responsive books.<sup>47</sup>

Another purpose of school libraries is for teacher-librarians to provide valuable instruction and support by responding to needs and requests from teachers and students, as well as providing much-needed instruction in the areas of information literacy, media literacy, digital citizenship, and more. Just as with content area instruction, teacher-librarians rely on standards when designing instruction (see [Appendix B: Companion Guidance Documents & Resources](#)).

In addition to school libraries, public library programs are an excellent resource for teachers, students, parents, and the broader community. Public libraries serve many roles in their communities and offer early learning and literacy engagement opportunities, summer and after-school literacy programs for students, and adult literacy learning.

## Hours Outside the School Day<sup>48</sup>

Reading and writing before and after school are important for literacy development. Educators can encourage children to spend more time reading and writing outside of the school day by creating a culture of literacy that extends beyond the school building. To do this, schools can make books available for borrowing, encourage book reviews and student writing to be shared during school announcements, and organize book clubs and writing groups as after-school activities. Guiding students to read independently or with a buddy while riding a bus to and from school is another way for a school to encourage more time for reading. Educators can also provide families with strategies to use when reading with their children after school. Some strategies include reading aloud together, providing writing materials to use at home, and giving guidance on how to talk with children about what they read.

Collaborating with community systems of care (e.g., tribal governments, community-based organizations, libraries, parks and recreation centers, culturally-specific organizations, early learning hubs, STEM/STEAM hubs, housing agencies, area chambers of commerce, business and industry, public agencies) that provide opportunities for formal and informal learning is another way to extend literacy learning outside the classroom. Examples of how schools can support these activities include announcing library events or working with local businesses (such as barbershops, hair salons, and laundromats) to provide books for children to read while they wait.<sup>49</sup>

45 [Scholastic, 2016](#)

46 [Library Research Service, 2013a](#); [Gretes, 2013](#)

47 [ODE, 2023](#)

48 [Michigan Department of Education, 2021](#)

49 For more examples of how to build and sustain school-community partnerships, see the Colorado Education Initiative's [toolkit](#).

## Literacy During Summer and School Breaks

Schools can support student literacy throughout the year during summer and school break by providing independent reading and extra support for literacy skills during summer and school break time through informal and formal reading opportunities. Summer programs may be perceived and designed to feel like punishment to students who have not been adequately supported in their literacy development. It is therefore critical that summer programs be intentionally designed to counter that narrative. In part, effective strategies may involve creating programs that are fun and engaging to student interests, and which also include a literacy component.

Encouraging students to find opportunities to read every day is one of many ways informal learning can happen outside the classroom. Daily reading outside of school is critical, with young students reading with an adult and older students reading independently. To strengthen reading skills, it is recommended that children in grades 2 and below read with an adult for at least 20 minutes daily outside of school time; while children in grades 3 and above read at least 30 minutes daily outside of school time, either with or without an adult. This additional reading builds fluency, vocabulary, stamina, and background knowledge, all necessary to develop literacy skills. Families can be encouraged to support their child's reading without concern for the length of text or genre. Novels, short stories, comic books, cooking recipes, and poetry provide reading opportunities.<sup>50</sup>

Strategies for supporting student literacy year-round include:<sup>51</sup>

- Local libraries can provide book suggestions and engaging summer reading programs that encourage independent reading throughout the year.
- Teachers can provide personalized lists of books students may like to read that connect to their interests.
- Families and students can share reading experiences, practice skill development that was learned during class, and discuss prompts for older children who can read independently.

Formal reading programs involve face-to-face learning, virtually or in person. Summer reading programs can be offered by the school or school partners, like community-based organizations and libraries. Summer learning programs provide unique opportunities to build relationships, spark joy, and deepen natural curiosity to promote learning, growth, and success for every student. Well-rounded summer learning is individualized to a student's assets, needs, and goals; intentional to meet learning goals and apply evidence-based instructional methods; and integrated into rigorous high-quality course content and meaningful study.<sup>52</sup>

50 [Michigan Department of Education, 2021](#)

51 [Michigan Department of Education, 2021](#)

52 [ODE, 2021c](#)

### KEY TAKEAWAYS

- Parents and families are the first, most important teachers in a child’s life. Before a child learns to read and write, they learn to listen and speak.
- Language development begins as the brain develops in response to genetic, medical, and environmental factors.
- Parents and caregivers have a role to play to supplement and reinforce the literacy learning that happens at school as much as possible at home. To create those conditions, it’s natural for parents and caregivers to need and want support, tools, and information, including knowledge of their child’s strengths and needs from educators’ perspectives.
- Paying attention to the literacy and learning that happens prior to children entering kindergarten ensures that children have a more seamless transition to kindergarten.
- Across almost every facet of literacy development, support and collaboration with families and community-based organizations strengthens student literacy development and serves as accelerators for student success.<sup>53</sup>
- Engagement with books and opportunities to write and draw from an early age promote excitement about reading and writing.
- Encouraging children to spend more time reading and writing outside of the school day can begin with creating a culture of reading and writing inside the school building.

### LEARN MORE

- [Toolkit: Tribal Best Practices](#)
- [Ways to Become More Culturally Responsive in Engaging American Indian and Alaska Native Families](#)
- [Tips for Supporting Reading Skills at Home](#)
- [Honoring Family in the Class](#)
- [Early Learning and Kindergarten Guidelines \(from ODE and DELC\)](#)
- [How Parents and Families Support Oral Language and Vocabulary](#)
- [Toolkit: Families and Schools Partnering for Children’s Literacy Success](#)
- [Addressing Challenged Materials in K-12 Education \(from ODE and State Library of Oregon\)](#)
- [Family Engagement Resources \(from ODE\)](#)
- [Toolkit: Community Engagement \(from ODE\)](#)
- [Toolkit: Jump Start Kindergarten \(from ODE\)](#)

<sup>53</sup> Dearing et al., 2004; Cronan et al., 1999

# Section 3: Oral Language as the Root of Literacy Development

Language is essential for children as they make sense of the world, develop relationships with others, and understand their role in their homes, schools, and communities.<sup>54</sup> When educators understand the role of oral language and dialect in literacy acquisition, they can leverage students’ oral language skills in any language or variation of English. Educators further students’ literacy development by intentionally providing scaffolding to support the simultaneous development of language and literacy skills. Skilled educators map new learning onto existing knowledge, thus building on linguistic strengths and accelerating literacy learning.

## The Role of Oral Language in Early Literacy Development

Literacy development is increasingly understood as a process that begins as the brain develops language – hence the increasingly familiar refrain “literacy begins at birth.” As infants hear more sounds from their home language(s), their brain connections become stronger, and they become more adept at recognizing the sounds of their home languages. These first sounds a child may hear or see (signed) are the voices of the people in their home,<sup>55</sup> which serve as the initial source of knowledge about language and their world. In turn, learning to read involves learning about print, specifically how words known from speech are represented in a visual-graphical code or written language.<sup>56</sup>



54 [Herrera et al., 2022](#)

55 Seidenberg, 2017

56 Seidenberg, 2017

## EARLY LITERACY FOR DEAF AND HARD OF HEARING STUDENTS

“Early and consistent access to a language is vital to its acquisition and continued development. Hearing loss complicates access to language. However, there are several strategies that are most often employed to build communication skills. There is no single test or exam that can determine which strategy is right for an individual. Understanding and spending time exploring options will allow the child to own the strategy best suited for them.”<sup>57</sup>

The Outreach Center for Deafness and Blindness, 2017

See also: [Early Reading for Young Deaf and Hard of Hearing Children: Alternative Frameworks and Foundations for Literacy: An Early Literacy Intervention for Deaf and Hard-of-Hearing Children](#)

A child’s ability to read and write is predicated on oral language because of the primary role oral language plays in laying the groundwork for foundational literacy skills.<sup>58</sup> In fact, research supports that reading, writing, and oral language are highly related.<sup>59</sup> It is also true that oral language is highly correlated with comprehension, which can be explained by the overlap in word recognition and oral language skills.<sup>60</sup> Students’ comprehension of spoken language is critical for their reading comprehension — the ultimate purpose of reading. This is also true of cultivating students’ writing ability.<sup>61</sup> While some children may develop oral language skills quickly and effortlessly, others may struggle with acquiring oral language. Factors such as genetics, environment, and early experiences all play a role in a child’s language development. Children who experience disability have brilliant minds that can process information at different speeds, rates, and patterns. This can create what systems frame as developmental delays or presents challenges that are best met through differentiated and inclusive instruction. It is important for parents, caregivers, and educators to be aware of these individual differences and provide appropriate intervention and support to help children reach their full potential in language acquisition. These needs should be considered within the context of each individual student’s needs and strengths, as described in [Section 8: Reaching All Learners](#). The larger context of how oral language is situated within, and interacts with, other elements of literacy is explored further in [Section 4: Reading Models Based in Research](#), [Section 5: Foundational Skills](#), and [Section 6: Writing, Reading Comprehension, Vocabulary, & Background Knowledge](#).

## Oral Language Skills and Text-Based Language Skills are Interrelated

Oral language includes semantics, which is essential to vocabulary development. It also includes phonemic awareness, which is critical to reading. When children learn to blend sounds into words and segment words into sounds (phonemic awareness) in English, they can then connect the sounds with corresponding letters (phonics) to sound out words and begin to master the alphabetic principle to identify words accurately. Accurate decoding (reading) and encoding (spelling) of words leads to high-quality representations of words in memory so that the words can be recognized instantly.<sup>62</sup> Such efficient recognition is critical to reading fluency and to comprehension.

57 [The Outreach Center for Deafness and Blindness, 2017](#)

58 [Foorman et al., 2016](#); Seidenberg, 2017; National Research Council, 1998

59 Mehta et al., 2005; Kim et al., 2011

60 Foorman et al., 2018b; Lonigan et al., 2018

61 [Massachusetts Department of Elementary and Secondary Education \(DESE\), n.d.](#)

62 Dehaene, 2009; Ehri, 2020; Perfetti & Helder, 2022; Seidenberg, 2017

## Multilingualism Supports Oral Language & Literacy

A growing number of Oregon’s children are learning more than one language resulting in multilingualism being one of their many strengths. There are many cognitive benefits to learning multiple languages. Multilingual students outperform monolingual students on tasks that use cognitive flexibility.<sup>63</sup> Multilingual students’ brains get an extra workout because navigating more than one language requires the brain to use problem-solving and task-switching skills. The multilingual brain, therefore, is wired for powerful literacy and language learning.

"Children who are learning English as a second language will become literate more easily if they have a strong foundation in their home language."

National Association for the Education of Young Children & International Reading Association, 2009

Effective literacy instruction is rooted in an asset-based approach in which teachers value the linguistic strengths students bring to the classroom, while also paying close attention to student instructional needs. For multilingual students developing two or more languages, "this plurality of languages provides a multi-textured way of viewing, understanding, and interacting in and with the world...literacy development is nested within this larger picture of first and second language acquisition and use. Children’s oral language practice and development in all languages is foundational to their literacy development."<sup>64</sup>

## An Expansive Perspective of Oral Language

Oral language plays a critical role in learning about self, culture, and tradition. When educators learn about the cultural and linguistic backgrounds of the children in their care and learn from families, they can then draw connections, build from linguistic strengths, and better support a student who may not yet be fluent with written text.

## Since Time Immemorial: Honoring Indigenous Language and Knowledge

Indigenous communities have centered story and oral language since Time Immemorial, passing information and carrying meaning and connection over generations without it being transcribed or written. These Native stories share traditional knowledge and connection to the land and help to carry culture and important teachings; such stories are often connected to seasons and the natural world. Oral tradition has kept Native languages and ways of knowing alive for thousands of years. Due to colonization and forced assimilation, the number of surviving Oregon tribal languages and dialects has dwindled from an original base of approximately one hundred to about eight. Tribal Elders often say that when a language goes extinct, a library dies.<sup>65</sup>

"Our Language is as old as time itself. For countless generations our people lived out their lives speaking our words. In all that time, our words were never written. They were carried in the hearts and minds of our ancestors. They were learned by each generation and in turn taught to the next."

Lewis, 2018

63 [Barac et al., 2014](#)

64 [Herrera et al., 2022](#)

65 [Lewis, 2018](#)

Efforts such as Native language revitalization programs led by the [Confederated Tribes of Grand Ronde](#) and the [Northwest Indian Language Institute at the University of Oregon](#) as well as Oregon’s Tribal History Shared History<sup>66</sup> curriculum, underscore the importance of honoring Indigenous languages and restoring value and shared understanding about the role of oral language and survivance<sup>67</sup> in Native culture. For example, the Tribal History Shared History curriculum includes a 4th-grade lesson<sup>68</sup> on the importance of oral storytelling: “Indigenous stories provide essential knowledge required to sustain and maintain certain ways of knowing and being. Each tribal nation has its own oral history, and these histories are just as valid as written records. Oregon Tribal Nations work hard to protect their lifeways and celebrate their ways of being and knowing.”<sup>69</sup>

## The Importance of Storytelling

Storytelling has the power to create connections between humans, animals, and the land, to pass on traditions, entertain, and affirm identity. A uniquely situated form of literacy, oral storytelling’s power is found through gestures, emotions, and voice. Many cultures use oral traditions to recite poetry, chants, and to connect through song. For the identities of all children to be fully seen and honored in early grades, there is an essential role for story and oral history. In early literacy, the cadence, flow, and rhythm of how the story is told supports early language development for young children.<sup>70</sup> A research study from the Frank Porter Graham Child Development Institute emphasizes the importance of recognizing and capitalizing on storytelling skills to help young African American children with their early reading development.<sup>71</sup> As Gholdy Muhammad explains within her historically and culturally responsive literacy framework, as children learn and grow, they engage in extensive identity exploration, trying to make sense of who they are, who others say they are, and who they desire to be. To support this effort, educators can structure literacy experiences that hold space for storytelling while centering learning opportunities that affirm and bring to life students’ (and their ancestors’) histories, cultures, and traditions.<sup>72</sup> Using oral language to honor cultural identity while simultaneously creating foundational literacy skills is critical for each and every child.

## Recognizing and Honoring Dialects

It is also important to recognize and honor children developing fluency in various dialects of English. They bring unique and valuable strengths to literacy learning, such as translanguaging, by “accessing different linguistic features or various modes of what are described as autonomous languages, in order to maximize communicative potential.”<sup>73</sup> For example, when a learning environment cultivates language varieties such as African American English, students’ bicultural and bidialectal identities and lived experiences are affirmed.<sup>74</sup>

It is important that teachers understand that language varieties are linguistically equal, even when they are not socially equal.<sup>75</sup> “Standard English” is not a language. It is one variety of English, and it is not linguistically superior to other varieties. Linguistic complexity is a profound area of research, often illuminating ways in which regional dialects or situational dialects require an amazing array of cognitive and social skills. This is true across race, social class, gender, and region.<sup>76</sup>

66 [ODE, n.d.-h](#)

67 Sabzalian, 2019

68 [ODE, n.d.-c](#)

69 [ODE, n.d.-c](#)

70 [Programmatic Assistance for Tribal Home Visiting \(PATH\), n.d.](#)

71 Gardner-Neblett & Iruka, 2015

72 Muhammad, 2020

73 [García, 2009a](#)

74 [Washington & Seidenberg, 2021](#)

75 Darder, 1991

76 [Grieve, 2022](#)

“Most languages have several within-language varieties. An inclusive way to think about language varieties is that they occur along a continuum from those that differ little from the general variety to those that are more distant. This framing includes all communication practices across all speakers and does not consider one variety to be superior. It allows us to put languages and speakers in their proper perspective as equally valued, especially as we support children learning to read and write. All children need to have the skills to make linguistic choices across contexts: formal, informal, home, school, speaking, reading, or writing.”

Washington & Seidenberg, 2021

Awareness of early literacy strategies supporting multidialectal students is vital for teaching, learning, and assessment. These strategies allow educators to promote students' academic achievement while recognizing and honoring the value of the student's home dialect.

#### KEY TAKEAWAYS

- Literacy development is increasingly understood as a process that begins as the brain develops language – hence the increasingly familiar refrain “literacy begins at birth.”
- Learning to read involves learning about print, specifically how words known from speech are represented in a visual-graphical code or written language.<sup>77</sup>
- A growing number of Oregon’s children are learning more than one language and can add multilingualism as one of their many strengths.
- Transformative literacy instruction is rooted in an asset-based approach, in which teachers value the linguistic strengths students bring to the classroom.
- Indigenous communities have centered story and oral language since Time Immemorial, passing information and carrying meaning and connection over generations without it being transcribed or written.
- All varieties of English (dialects) are valid, valued, and deserve to be recognized as such.
- Oral language plays a critical role in learning about self, culture, and tradition. A child’s ability to read and write is predicated on oral language because of the primary role oral language plays in laying the groundwork for foundational literacy skills.<sup>78</sup>

#### LEARN MORE

- [Early Learning and Kindergarten Guidelines \(from ODE\)](#)
- [Oral Language | National Association of Education of Young Children](#)
- [Telling and Retelling Stories: Learning Language and Literacy](#)
- [Supporting Early Language Development for Diverse Learners](#)

<sup>77</sup> Seidenberg, 2017

<sup>78</sup> [Foorman et al., 2016](#); Seidenberg, 2017; National Research Council, 1998

# Section 4: Reading Models Based in Research

Learning to read and write is complex; yet, literacy researchers have made significant strides in working to demystify these processes. The science of reading represents over five decades of research, inclusive of studies across the world and spanning multiple disciplines (i.e., cognitive psychology, developmental psychology, education, implementation science, linguistics, neuroscience, school psychology). This body of knowledge informs how reading skills develop and describes the cognitive processes that occur in the brain when students learn to read. It also sheds light on why some students have difficulty, how educators can most effectively assess and teach, and how data can be used to improve student outcomes.

## The Science of Reading

### The Basics

There are so many pieces to the Science of Reading that it can be difficult to know where to start. Here are a few highlights about what the Science of Reading IS and what it IS NOT. This knowledge will help you on your journey to teaching all children, including those with diverse needs and cultural backgrounds, to read.

#### What it IS

##### A Collection of Research

Research, over time, from multiple fields of study using methods that confirm and disconfirm theories on how children best learn to read.

##### Teaching Based on the 5 Big Ideas

**Phonemic Awareness** - The ability to identify and play with individual sounds in spoken words.

**Phonics** - Reading instruction on understanding how letters and groups of letters link to sounds to form letter-sound relationships and spelling patterns.

**Fluency** - The ability to read words, phrases, sentences, and stories correctly, with enough speed and expression.

**Vocabulary** - Knowing what words mean and how to say and use them correctly.

**Comprehension** - The ability to understand what you are reading.

##### Ever Evolving

There is new research and evidence all the time. As populations, communities, and approaches evolve, so should practice.

#### SCIENCE OF READING

Science of reading is aligned with “neurological and cognitive science studies of how brains process written words,”<sup>79</sup> and includes a broad collection of research from multiple fields of study including cognitive science, learning sciences, literacy research, and instructional science and research broadly. The “science of reading” captures this comprehensive, ever-evolving, research base that informs literacy instruction for all learners.<sup>80</sup>

*Within Oregon’s Early Literacy Framework, this definition of the science of reading reinforces the essential role it plays in informing literacy instruction. Reading research provides fundamental information about reading and it deserves to be recognized as such. Furthermore, it underscores the complexity and richness of literacy instruction. Amanda P. Goodwin, co-editor of the academic journal Reading Research Quarterly, describes the science of reading as: “not just phonemic awareness, phonics, reading fluency, vocabulary, and comprehension but also language development, motivation, dyslexia, the reading of digital texts, multilingual literacy, the literacies of Black students and other historically minoritized student groups...”<sup>81</sup>*

*Ultimately, the term science of reading can be interpreted in divisive ways or in informative ways; the goal in this framework is to use the science of reading as a term to bring clarity and common ground to move Oregon forward in supporting the literacy development to all students.*

#### What it IS NOT

##### A program, an intervention, or a product that you can buy.

The Science of Reading could be considered an approach to teaching reading that is based on decades of research and evidence. It is NOT a specific program.

##### Phonics-based programs that drill phonics skills.

Phonics is an integral part of teaching reading based on science, but it is just one of the five big ideas that should be taught so all children can learn to read.

##### Complete and no more study needs to be done.

As with any science, it is never complete. We can always know more. More study happens all the time and researchers, teachers, and families can work together to bring the best research into classrooms.

Research information is hereby reported to the National Center of Reading Research from the Oregon Department of Education in partnership with the Office of Statewide Educator Programs Award # 1080020064. This report is to be used as a resource for authors and not for dissemination. ©2022 by the U.S. Department of Education. No part of this work may be reproduced by the U.S. Government. Copyright Clearance Center: Reading Research Quarterly

Figure 2. The Science of Reading

79 [Shanahan, 2021](#)  
 80 [National Center on Improving Literacy, 2022](#)  
 81 [Heller, 2022](#)

# Five Models of Reading and the Essential Components of Literacy

The following five reading models reflect past and present research findings and hold important insight into how children acquire literacy skills that are paramount for shaping and reshaping how literacy instruction is approached and designed. While there are many models of reading, these are commonly used models to illustrate the core ideas of reading research:

1. The Five Pillars of Reading
2. The Simple View of Reading
3. Scarborough’s Rope
4. The Four-Part Processing Model
5. The Active View of Reading

These models are not methods, techniques, or programs; however, they help educators understand the interrelated components, or smaller parts, that comprise reading and writing. No single reading model captures all of the components; for this reason, it is important to draw from multiple models.

Several components of literacy from across these models are reinforced throughout the framework: oral language, concepts of print, phonological and phonemic awareness, phonics, alphabetic principle, fluency, automaticity, background knowledge, vocabulary, text comprehension, and writing (written expression and spelling).

This section describes how each model contributes to the interplay and interdependence of these components. [Section 3: Oral Language as the Root of Literacy Development](#), [Section 5: Foundational Skills](#), and [Section 6: Writing, Reading Comprehension, Vocabulary, & Background Knowledge](#) examine more closely the components elevated by these models, describe the relationship between the components, and support the connection of theory to practice by highlighting instructional implications for each.

## 1. The Five Pillars of Reading

In 2000, the National Reading Panel identified five components as part of a comprehensive system for English literacy instruction:

- **Phonemic awareness:** an awareness of, and the ability to, manipulate the individual sounds (phonemes) in spoken words.
- **Phonics:** the study and use of sound/spelling correspondences and syllable patterns to help students read written words.
- **Fluency:** reading text with sufficient speed, accuracy, and expression to support comprehension.
- **Vocabulary:** the body of words and their meanings that students must understand to comprehend text.
- **Text comprehension:** the ability to make meaning using specific skills and strategies, vocabulary, background knowledge, and verbal reasoning skills.

Over the last two decades, research has built on the above original components to include oral language and written expression as additional ingredients to cultivate students' literacy development:<sup>82</sup>

- **Oral language:** "Sometimes called spoken language, oral language includes speaking and listening—the ways that humans communicate with one another. Oral language skills provide the foundation for word reading and comprehension. They are at the heart of listening and reading comprehension, serving as a predictor for both."<sup>83</sup> (See [Section 3: Oral Language as the Root of Literacy Development](#))
- **Writing (written expression and spelling):** Writing was added, "due to the reciprocal relationship between written expression and text comprehension."<sup>84</sup> (See [Section 6: Writing, Reading Comprehension, Vocabulary, & Background Knowledge](#))

Figure three represents the original five pillars of reading and two additional components.

**Figure 3. Pillars of Reading (adapted to include writing and oral language)**



## 2. The Simple View of Reading

As its name implies, this model reinforces a straightforward interpretation of reading that continues to inform a core conceptual idea around reading in which decoding and language comprehension are both essential to reading comprehension and skilled reading. This model is widely used and referenced in relation to the science of reading and empirically validated in over 150 scientific studies.<sup>85</sup> It includes two key components, decoding (or word recognition) and language comprehension (the ability to understand spoken language). Both must be present for reading comprehension to be possible. This reinforces the importance of early oral language development composition, both before and during the early grades – beginning formal schooling with strong oral language paves the way for reading comprehension as students begin to learn how to decode and recognize words. Figure 4 represents the Simple View of Reading.

<sup>82</sup> [Graham & Hebert, 2011](#)

<sup>83</sup> [Literacy How, 2020](#)

<sup>84</sup> [Colorado Department of Education, 2020](#)

<sup>85</sup> [The Reading League, 2022](#)

Figure 4. Simple View of Reading



Based upon more recent advances in reading research, the decoding "side" of the equation may be referred to as fluent word reading, acknowledging the importance of automaticity and fluency in word recognition.<sup>86</sup>

The Simple View is most useful for understanding the abilities that underlie early reading comprehension and may help in understanding both how to design effective reading instruction and the source of reading struggles for some students. Intervention for children who are not yet skilled readers is most effective when it addresses the specific area of need, which may be decoding, language comprehension, or both.<sup>87</sup> For example, the Simple View can also inform an understanding of skilled reading and three different types of reading difficulties:<sup>88</sup>

- A typically developing reader has both strong word recognition skills and strong comprehension of oral language. This leads to strong reading comprehension or skilled reading.
- Students who are not yet strong readers need support in both areas.
- Hyperlexic students can read words at a level above their oral language comprehension. These students read quickly and accurately, but have difficulty comprehending what they just read.
- The term dyslexic is used to refer to students with strong language comprehension, but weak word recognition (decoding) skills.

Identifying students' individual needs through this lens can help inform teachers' instructional next steps and ensure that interventions are appropriately matched to a student's area(s) of need. For more information on supporting students with reading difficulties, see [Section 8: Reaching All Learners](#).

#### THE SIMPLE VIEW OF READING AND MULTILINGUAL LEARNERS<sup>89</sup>

Research has shown that English learners can achieve word reading proficiency that matches their English monolingual peers when they receive evidence-based instruction that responds to their linguistic strengths and needs.<sup>90</sup> While all students should receive instruction in both fluent word reading and language comprehension to secure solid reading comprehension,<sup>91</sup> multilingual learners benefit from more of both, with considerations for how a focus on those skills is culturally responsive and ensures a well-rounded learning experience.

86 [DESE, 2022b](#)

87 Snow, 2018

88 Gough & Tunmer, 1986

89 [DESE, 2022b](#)

90 Vargas et al., 2021

91 Verhoeven & van Leeuwe, 2012

### 3. Scarborough's Reading Rope<sup>92</sup>

Scarborough's Reading Rope is a visual metaphor for developing skills over time that expands upon the essential components of the Simple View of Reading. This model asserts that, for either of the two essential components of reading (decoding and language comprehension) to develop successfully, students need to be taught the skills necessary for each of those two domains. In their development, these subcomponents intertwine and become increasingly strategic and automatic over time to develop fluent, skilled reading. This interweaving of skills can occur early in literacy development and continues as students become more skillful readers.

Figure 5. Scarborough's Rope Representation<sup>93</sup>

#### Language Comprehension

Background Knowledge  
(facts, concepts, etc.)

Vocabulary  
(breadth, precision, links, etc.)

Language Structures  
(syntax, semantics, etc.)

Verbal Reasoning  
(inference, metaphor, etc.)

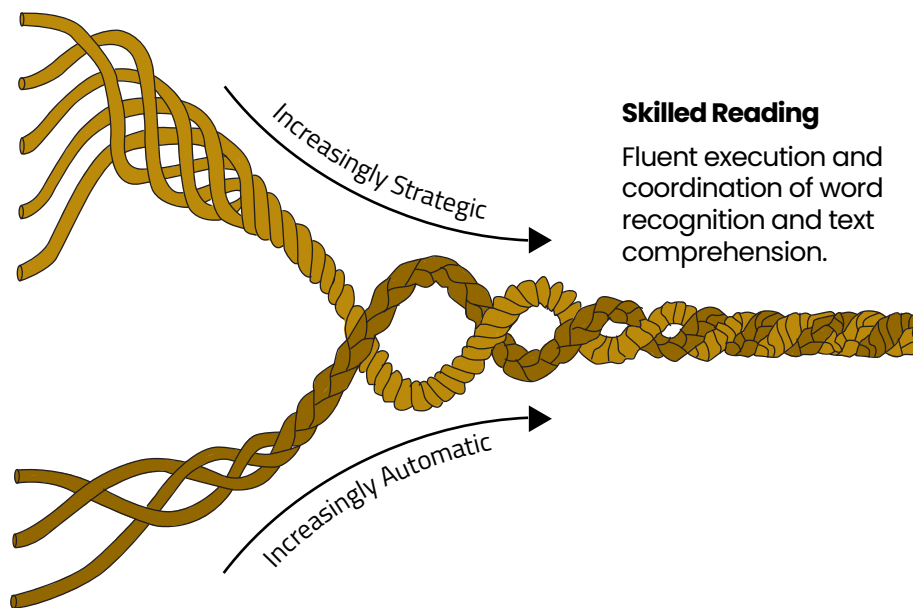
Literacy Knowledge  
(print concepts, genres, etc.)

#### Word Recognition

Phonological Awareness  
(syllables, phonemes, etc.)

Decoding  
(alphabetic principle,  
spelling-sound  
correspondences)

Sight Recognition  
(of familiar words)



Recent research supports that reading, writing, and oral language are so highly related that they can be thought of as a single literacy category<sup>94</sup> and that proficiency in reading comprehension can be explained by the overlap in word recognition and oral language skills.<sup>95</sup> This research expands the Simple View of Reading and also provides an empirical base for the strands of language and word recognition that become interwoven in Scarborough's reading rope.<sup>96</sup> Importantly, this research also expands the five components of the National Reading Panel Report<sup>97</sup> to include oral language (not just vocabulary) and writing (spelling and written expression).

92 Scarborough, 2001

93 [Duke & Cartwright, 2021](#); Scarborough, 2001

94 Mehta et al., 2005

95 Foorman et al., 2018b; Lonigan et al., 2018

96 Gough & Tunmer, 1986; Scarborough, 2001

97 [National Reading Panel, 2000](#)

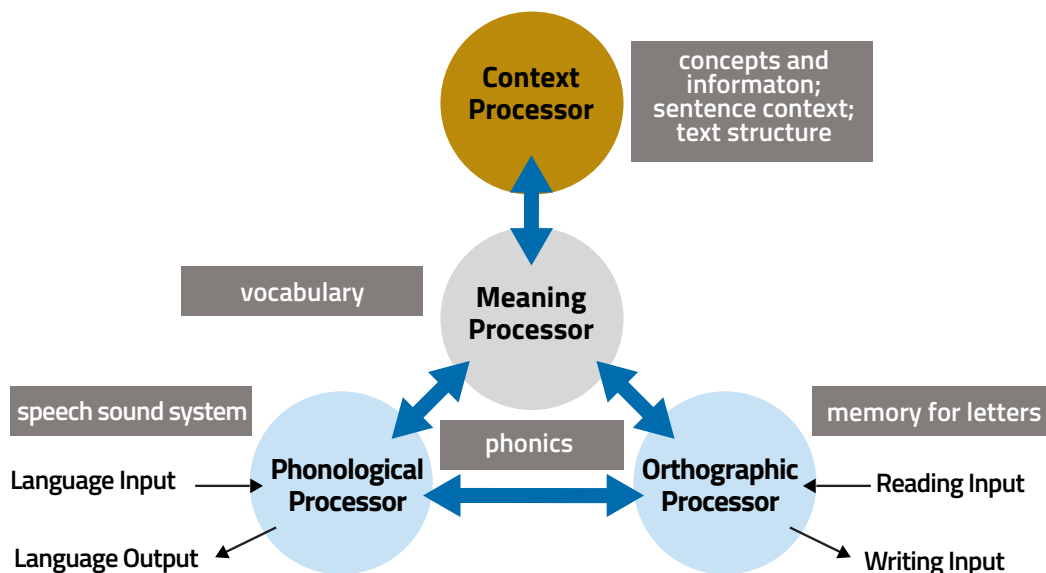
## 4. The Four-Part Processing Model<sup>98</sup>

The Four-Part Processing Model for word recognition is a model that illustrates how the brain reads or recognizes words and can be useful in guiding educators' understanding of the underlying processes involved in word recognition, language comprehension, and overall reading comprehension. The model describes four processors, or areas in the brain, that are active when reading:

- **Phonological Processor:** Detects, recalls and understands sounds that make up spoken words and controls the production of sounds and words in spoken language.
- **Orthographic Processor:** Recognizes, stores and recalls the letters and combination of letters used in written language and stores print information needed to efficiently recognize and recall words when reading and writing/spelling.
- **Meaning Processor:** Interprets word meanings and organizes words into meaningful categories according to spelling patterns, concepts, word relationships, word meanings, and; meaningful parts of words
- **Context Processor:** Supports the meaning processor by interpreting words based on other language in the text, experiences, and background knowledge

The orthographic and phonological processors first work together to decode a word by connecting the word's speech sounds to its symbols (phonics). Once the word is read, the meaning processor considers all possible definitions of the word (vocabulary), while the context processor helps support the meaning processor by applying context and background knowledge about what is being read.

Figure 6. **Four Part Processing Model of Word Recognition**<sup>99</sup>



The Four Part Processing Model helps to illustrate how different elements of instruction support the different brain processes required for reading and writing, and can inform how to provide additional support for students struggling to read.

<sup>98</sup> Seidenberg and McClelland, 1989 and Dehaene 2013

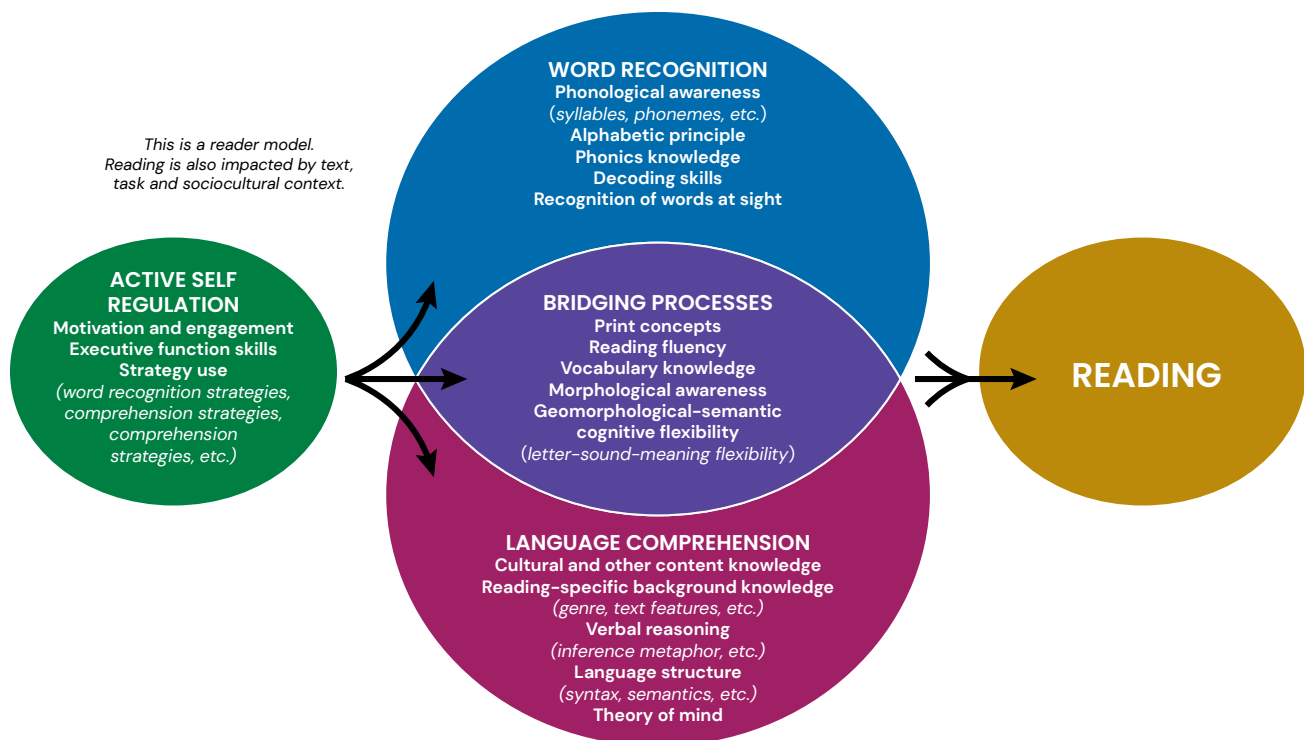
<sup>99</sup> [Wyoming Department of Education, 2019, p.13](#)

## 5. The Active View of Reading

The Active View of Reading is a recent model of reading that expands the Simple View of Reading to add text, task, and sociocultural context.<sup>100</sup> This model also incorporates research on executive function skills<sup>101</sup> and comprehension monitoring<sup>102</sup> and depicts a multidimensional context for literacy.<sup>103</sup> At its core is the belief that more than just word recognition and language comprehension are needed for children to develop as “active readers” (readers with the literacy skills to successfully navigate text while feeling empowered and engaged). Key ideas supported by the Active View of Reading follow:

- In addition to decoding and language comprehension, executive function skills, comprehension strategy use, and motivation support reading comprehension.
- Reading processes, such as vocabulary and morphological awareness (understanding parts of words, like Latin roots or prefixes), help bridge decoding and language comprehension.
- Cultural knowledge and content knowledge are constructs that contribute to reading success.

Figure 7. Active View of Reading representation<sup>104</sup>



This model reinforces a bridging process between word recognition and language comprehension development. In other words, the relationship between word recognition and language comprehension represents an equally important function of reading. For example, a strong vocabulary improves the ability to decode unfamiliar words. Similarly, knowledge of another language may influence word recognition in English.<sup>105</sup>

100 [Duke & Cartwright, 2021](#)

101 Kieffer & Christodoulou, 2019

102 Castles et al., 2018; [Shanahan et al. 2010](#)

103 [Duke & Cartwright, 2021](#)

104 [Duke & Cartwright, 2021](#)

105 [Duke & Cartwright, 2021](#)

The Active View also reinforces the role of active self-regulation in the reading process and reinforces the larger sociocultural context of reading. Competent and confident readers not only have strong word recognition and language comprehension skills, they actively self-monitor in order to apply skills and strategies while they read so that they can actively make meaning and read fluently. Most importantly, the Active View of Reading model provides substantial grounding for culturally responsive practice as an influencing factor in learning to read and write.<sup>106</sup>

#### KEY TAKEAWAYS

- Reading research, often termed “the science of reading,” studies how reading skills develop and helps us to understand what happens in the brain when students learn to read.
- The following five reading models reflect past and present research findings and hold important insight into how children acquire literacy skills that are paramount for shaping and reshaping how literacy instruction is approached and designed:
  - The Five Pillars of Reading
  - The Simple View of Reading
  - Scarborough’s Rope
  - The Four-Part Processing Model
  - The Active View of Reading
- Generally, these reading models emphasize the interaction between:
  - word-identification, and
  - language comprehension.
- This interaction results in reading comprehension through:
  - knowledge of the English writing system;
  - linguistic knowledge;
  - background knowledge; and
  - the type of text, nature of the task, sociocultural context, and executive functions.
- Executive functions of memory and attention can be enhanced by teaching self-monitoring strategies and motivating students to engage with text.
- A major roadblock to comprehending text is fluency. These models emphasize the importance of accurate and efficient word identification and recognition so that executive skills can be devoted to comprehending text.

#### LEARN MORE

- [Which Reading Model Would Best Guide School Improvement?](#)
- [The Impact of Word Knowledge Instruction on Literacy Outcomes in Grade 5](#)
- [The Science of Reading Progresses: Communicating Advances Beyond the Simple View of Reading](#)
- [What is the Science of Reading?](#)

<sup>106</sup> [Duke & Cartwright, 2021](#)

# Section 5: Foundational Skills

Foundational skills refer to the tightly interrelated but discrete sub-skills (e.g., phonics, phonological awareness, concepts of print, fluency) specific to each language. They are the smaller, interconnected pieces that allow a child’s brain to break the alphabetic code in order to read fluently and make meaning of words on the page. Foundational skills in the teaching of literacy are essential. Unlike oral language, which develops naturally through incidental learning in the home and community, learning to read and write requires explicit instruction in foundational skills (print concepts, phonics, and phonemic awareness). For this reason, school leaders and educators design schoolwide systems to provide students with ample opportunities (especially in early grades) to practice foundational skills in culturally responsive contexts and receive consistent feedback as skills progress is paramount to ensuring that students learn to read.

Although this section is separate from and precedes [Section 6: Writing, Reading Comprehension, Vocabulary, & Background Knowledge](#), it would be inaccurate to imply that grades K–2 are all about foundational skills and grades 3–5 are all about background knowledge, reading comprehension, vocabulary, and writing. The reading models help convey this point of overlap.<sup>107</sup>



- Section 1
- Section 2
- Section 3
- Section 4
- Section 5**
- Section 6
- Section 7
- Section 8

107 B. R. Foorman, personal communication, March, 10, 2023



## Overview of Foundational Skills<sup>108</sup>

Each foundational skill is described below in Table 1, along with commonly associated terms, to promote shared understanding and clarity. Reading and writing skills in English will need to be adjusted for multilingual learners based on the target language of instruction. For example, phonological awareness skills can transfer across languages when students have opportunities to build these skills in their native language and English. Additionally, multilingual learners developing literacy in English instructional programs will need a strong foundation of oral language development in order to reach higher levels of English reading fluency, whereas multilingual learners in dual language programs will already have the oral language skills to develop reading fluency if the literacy instruction is in their home language. [Section 8: Reaching All Learners](#) of this framework adds and further addresses the development of foundational skills for multilingual students.

**Table 1. The Foundational Skills (A cursory look)<sup>109</sup>**

Foundational Skill	Description	Related Skills & Concepts
<b>Print Concepts</b>	<p>Print concepts include understanding the features and organization of printed texts, letter formation, and recognizing distinctive features of letters. These include some discrete skills and others that overlap with phonological awareness and phonics activities over time, such as recognizing that sentences consist of words and spoken words are represented by groups of letters. Print concepts are primarily a kindergarten skill, aside from a focus on the features of a sentence (capitalization, punctuation) in first grade.</p> <p>Print concepts are supported when basic fine motor and perceptual skills are developed (i.e. how to write upper/lower case letters and distinguish between similar letters like b/d/p.)</p>	<ul style="list-style-type: none"> <li>• <b>Return sweep:</b> moving your eyes from the end of one line of text to the start of another line.</li> <li>• <b>One-to-one correspondence of words:</b> matching the printed word to the spoken word.</li> <li>• <b>Letter recognition:</b> visually recognizing the name of a printed letter.</li> </ul>

<sup>108</sup> Derived from [Foorman et al., 2016](#)

<sup>109</sup> Adapted from [Student Achievement Partners, 2020](#)

Foundational Skill	Description	Related Skills & Concepts
<p><b>Phonological Awareness</b></p>	<p><b>Phonological awareness</b> refers to awareness of the segments of sound in words.<sup>110</sup> Phonological awareness is entirely oral and forms the building blocks for later reading before print is even introduced.</p> <p><b>Phonemic awareness</b> is a subgroup of phonological awareness that refers to the specific ability to hear, identify, and manipulate individual sounds (phonemes) in spoken words. Phonemes are the smallest unit of sound within words. Phonemic awareness, including blending sounds into words and segmenting words into sounds, has a direct and significant effect on learning to read and spell. Like phonological awareness, phonemic awareness is entirely oral.</p>	<ul style="list-style-type: none"> <li>• <b>Oral Rhymes and Alliteration:</b> recognizing the beginning and ending sounds of words. (Example: The end of the word “cast” sounds just like “blast”. These words rhyme.)</li> <li>• <b>Words:</b> hearing and counting the number of words when we read or speak. (Example: I hear five words in the sentence “I ran to the cone.”)</li> <li>• <b>Syllables:</b> A syllable is a word or word part that contains a vowel or, in spoken language, a vowel sound (Example: I hear two syllables in the word “kitten.”)</li> <li>• <b>Onset/Rime:</b> the part of a syllable before the vowel (onset) and the vowel and the consonants that follow (rime).</li> <li>• <b>Phonemes:</b> an individual unit of speech in a word that can be heard discreetly. There are 44 phonemes in the English language: 25 consonants and 19 vowels.</li> <li>• <b>Segmenting:</b> breaking, or segmenting a word into its separate sounds (cat= /c/ /a/ /t/)</li> <li>• <b>Blending:</b> combining, or blending the separate sounds in a word to say the word (/c/ /a/ /t/= cat)</li> <li>• <b>Manipulating:</b> adding, deleting, or substituting sounds in a word</li> </ul>

Section 1

Section 2

Section 3

Section 4

Section 5

Section 6

Section 7

Section 8

110 Foorman et al., 2016

Foundational Skill	Description	Related Skills & Concepts
<p><b>Phonics and Word Recognition</b></p>	<p>Phonics consists of learning sound and spelling patterns in a distinct sequence that allows students to identify the relationship between sounds of spoken language and the letters that represent those sounds in print. Phonemic awareness connects directly to phonics, as students must be able to distinguish the sounds in order to recognize them in written form. In phonics instruction, decoding and encoding go hand-in-hand.</p> <p>The goal of phonics instruction is to help children to learn and be able to use the alphabetic principle. The alphabetic principle is the understanding that there are systematic and predictable relationships between written letters and spoken sounds. Phonics instruction helps children learn the relationships between the letters of written language and the sounds of spoken language.</p>	<ul style="list-style-type: none"> <li>• <b>Decoding:</b> Translating a word from print to speech by using knowledge of phoneme-grapheme, or sound-symbol correspondences.</li> <li>• <b>Encoding:</b> Translating speech into print (writing) using knowledge of phoneme-grapheme, or sound-symbol correspondences.</li> <li>• <b>Automaticity:</b> the ability to decode words in print correctly and instantly. As automaticity increases, readers are able to focus more attention on constructing meaning from text rather than decoding.</li> <li>• <b>Word Recognition:</b> Quick identification (recognition) of a previously learned word and its meaning; recognizing words in the moment of reading.</li> <li>• <b>Graphemes:</b> a letter or combination of letters that represent a sound (phoneme) in a syllable or word.</li> <li>• <b>Sound and Spelling Pattern:</b> the phonics-based skill of focus in a scope and sequence, usually a letter, letter pair, or word part.</li> </ul>

Foundational Skill	Description	Related Skills & Concepts
<p><b>Alphabetic Principle</b></p>	<p>Children's reading development is dependent on their understanding of the alphabetic principle – the idea that letters and letter patterns represent the sounds of spoken language. Learning that there are predictable relationships between sounds and letters allows children to apply these relationships to both familiar and unfamiliar words, and to begin to read with fluency.</p> <p>Children whose alphabetic knowledge is well developed can identify and name letters with ease and can begin to learn letter sounds and spelling patterns.</p>	<ul style="list-style-type: none"> <li>• <b>Alphabetic Awareness:</b> Knowledge of letters of the alphabet coupled with the understanding that the alphabet represents the sounds of spoken language and the correspondence of spoken sounds to written language.</li> <li>• <b>Alphabetic Understanding:</b> Understanding that the left-to-right spellings of printed words represent their phonemes from first to last.</li> <li>• <b>Decodable Text:</b> Text in which the majority of words can be identified using their most common sounds.</li> <li>• <b>Regular Word:</b> A word in which all the letters represent their most common sound, in which the alphabetic principle can be applied.</li> <li>• <b>Irregular Word:</b> A word that cannot be decoded and must be identified by sight.</li> </ul>
<p><b>Fluency</b></p>	<p>Reading fluency encompasses accuracy, the speed or rate of reading, and the ability to read materials with expression, and comprehension. Expression, or prosody, includes timing, phrasing, emphasis, and intonation. Fluency is built through word recognition that is automatic and fluid, allowing readers to focus on comprehension of the text. Teaching systematic phonemic awareness and phonics and applying these skills to texts allows students to build automaticity in word reading (and thereby comprehension). To build fluency over time, and to connect reading to meaning, it is important to build from a focus on accuracy for readers. Fluency represents the essential link between reading words quickly and accurately and understanding text.</p>	<ul style="list-style-type: none"> <li>• <b>Accuracy:</b> the ability to read words correctly. Over time, accuracy will lead to developing a bank of “sight words,” or words that are correctly and instantly recognized without applying decoding knowledge.</li> <li>• <b>Rate:</b> the speed at which a person reads. Fluent reading is not speed reading; an appropriate rate reflects an understanding of what is read and varies based on grade-level.</li> <li>• <b>Prosody:</b> reading with appropriate expression. Components of prosody include timing, phrasing, emphasis, and intonation.</li> <li>• <b>Comprehension:</b> the ability to synthesize, or make meaning from text.</li> </ul>

## Instructional Considerations for Foundational Skills<sup>111</sup>

Foundational skills instruction must be a part of the core curriculum and materials, and be integrated into protected daily literacy instruction, with opportunities to practice and apply these skills up to and beyond grade five as necessary. They cannot only be added as a supplementary component. Providing it only as supplemental content is not only inadequate for most students learning to read, but it can be especially detrimental to students who need additional support learning to break the code of written language.

### Specific Strategies

More specifically, the following strategies help all students develop strong foundational skills, especially students with foundational reading and writing difficulties:<sup>112</sup>

- **Explicit instruction:**<sup>113</sup> Emphasize active participation for students while providing modeling (I do), scaffolding (we do), and prompting (you do) until students can apply a skill independently.
- **Systematic instruction:** Teach skills intentionally and in a carefully planned sequence with each foundational skill presented in a logical and recommended sequence, beginning with simple skills and moving to more complex skills.
- **Precise, simple, and replicable language:** Use precise, simple language and ensure that instructions and explanations are short and clearly stated; use consistent language when modeling a reading skill or conducting a “think aloud.” Think-aloud effectively allows the teacher to demonstrate orally how a skilled reader thinks about a literacy task.
- **Repeated opportunities to practice, build fluency, and review:** Provide opportunities for teacher-supported guided practice of a previously taught skill, as well as opportunities for independent practice in which students work individually or in small groups. Embedded practice across the curriculum increases the maintenance and generalization of newly learned skills. This includes providing a “double dose” of instruction in which a previously taught skill is retaught, using small group or one-on-one instruction, and/or using technology to facilitate reading practice.<sup>114</sup>
- **Adequate time and exposure to decodable text:** When students read and re-read decodable texts, they apply skills practice in real-time and connect their phonics and decoding instruction to reading. Once students are able to apply their decoding skills with fluency, they can transition away from decodable texts to authentic texts that are written to inform, explain, entertain, or elicit a response. Focusing first on decodable texts to build and practice decoding skills provides a pathway for students to grow into texts that are not controlled by phonics.
- **Frequent opportunities to respond and interact:** Engage students by providing opportunities to respond in small groups. Active participation strategies include choral responses, whiteboards, response cards, or partner talk. For students with the most intensive needs, research suggests that groups of two to four students or one-on-one instruction may be the most effective.<sup>115</sup>
- **Specific error correction and high-quality feedback:** Provide students with both positive feedback and error correction.<sup>116</sup> When students make errors, provide specific and precise feedback on the exact part of the incorrect process to ensure they do not continue to practice and solidify errors. Additionally, model the correct response and provide students with opportunities to practice the skill correctly to help cement the new learning.

111 Derived from [Foorman et al., 2016](#)

112 [Weingarten et al., 2018](#)

113 [Special Education Resource Project, n.d.](#)

114 Gersten et al., 2008

115 [Vaughn et al., 2012](#)

116 Hattie & Timperley, 2007

When teaching foundational skills, Table 2 provides a series of important pivots and shifts.

**Table 2. Teaching Foundational Skills<sup>117</sup>**

<b>Instead of This:</b>	<b>Do This:</b>
Loosely tending to the order of foundational skills and allowing for classroom-to-classroom variance...	Follow a clear, intentional scope and sequence based on the learning progression for foundational skills (Figure 8).
Spending a few minutes a day on foundational skills...	Ensure adequate instructional time is spent on teaching foundational skills, including related practice with decodable texts and writing. The amount of foundational skill instruction should be responsive to student needs and strengths.
Focusing only on English...	Make connections between English and a child's home language so that they can leverage existing knowledge and skills. Whenever possible, create opportunities for children to learn to read in their home language.
Patching together an assortment of favorite lessons and randomly sourced supplemental materials...	Select and implement high-quality instructional materials for core instruction that provide guaranteed and viable curriculum across the school and district.

## Learning Progressions

Across the K–5 continuum, literacy instruction must systematically build students' foundational skills alongside the application of meaning-making skills and knowledge. Once students receive instruction in particular skills based on a learning progression, they will progress more quickly when provided with opportunities to apply those skills in the context of connected text and authentic reading and writing.<sup>118</sup> Just as literacy learning progresses in complexity over time, the teaching also responsively advances instruction in complexity to ensure continuity and alignment in the arc of a student's literacy trajectory.

It is also important to note that skills may develop beyond the grade level suggested in the progression, and students may need intensified instruction in skills that need more development.

### THREE KEY RESOURCES TO SUPPORT THE USE OF LEARNING PROGRESSIONS INCLUDE:

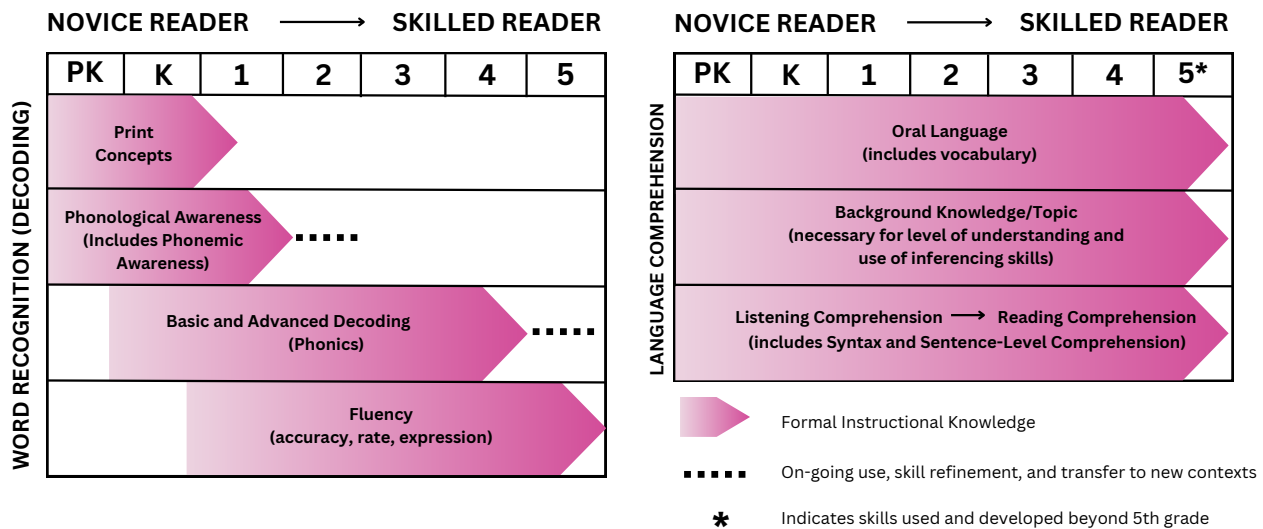
- [Oregon's ELA K-5 Foundational Reading Skills Progression](#) – serves as an instructional support tool for planning purposes to assist foundational reading skills development.
- Achieve the Core's [Foundational Skills Guidance Documents: Grades K-2](#) provide examples and guidance for planning literacy instruction in K-2.
- Head Start's [Planned Language Approach](#) provides resources for education staff and families to support language and literacy development for children ages birth to five in the key skill areas of Alphabet Knowledge and Early Writing; Background Knowledge; Book Knowledge and Print Concepts; Oral Language and Vocabulary; and Phonological Awareness.

<sup>117</sup> [Student Achievement Partners, n.d.-a](#)

<sup>118</sup> Armbruster et al., 2006; Blevins, 2016

Figure 8 outlines a learning progression, informed by reading research, which is designed to develop novice readers into skilled readers spanning pre-kindergarten through 5th grade. The progression of foundational skills (for word recognition/decoding) is presented with the progression for the elements of language comprehension to illustrate how the design of instruction throughout students' development and grade levels work together to support skilled reading over time. Each bar represents an evidence-based estimate for when typical readers master these skills. These learning progressions give educators a guide to the elements of literacy they need to prioritize, including foundational skills, when sequencing their instruction to meet the needs of a broad range of learners.

Figure 8. Foundational Skills Learning Progression<sup>119</sup>



## High-Quality Instructional Materials

Access to high-quality instructional materials is a key lever for supporting literacy teaching and learning, and this is especially true for teaching foundational skills. All approved materials provide explicit and systematic instruction and diagnostic support in concepts of print, letter recognition, phonemic awareness, phonics, word awareness and vocabulary development, syntax, and fluency.

A growing and compelling research base suggests that high-quality instructional materials can yield significant improvements in students' learning<sup>120</sup> especially when paired with high-quality professional learning that supports implementation. Given this, effective curriculum adoptions are also paired with high-quality professional learning for strong implementation.

Oregon's language arts instructional materials adoption criteria for grades K-2 and grades 3-5 include foundational skills. Additionally, to be included on the state-approved list,<sup>121</sup> the adopted core language arts curriculum must also include high-quality texts, text-dependent discussions and writing, building knowledge, text-dependent questions and tasks, supports and scaffolds for all learners, cultural representation, and accessibility. Every curriculum on the State Board-approved adoption list meets this minimum criterion. Any adopted instructional materials should be evaluated for culturally responsiveness and adapted or supplemented to meet the strengths and needs of the classroom community. Reviewing, adopting, and supporting the implementation of high-quality instructional materials is one of the most important jobs of education leaders.

<sup>119</sup> [Student Achievement Partners, 2020a](#)

<sup>120</sup> [ODE, 2022b](#)

<sup>121</sup> [ODE, 2018b](#)

## Explicit and Systematic Instruction

To learn to read, the majority of children require explicit instruction and practice with foundational reading and multiple opportunities with differentiated scaffolding to gain fluency with grade-level texts. Explicit and systematic instruction targeting foundational skills can also help prevent students from experiencing reading difficulties and mistakenly being identified as needing special education.

Structured literacy is an approach to literacy instruction that incorporates the science of reading research and employs explicit, systematic, diagnostic, and responsive teaching of the language and literacy skills needed to be a successful reader.<sup>122</sup> The components and methods of structured literacy instruction are beneficial for all, but critical for students with reading disabilities, including dyslexia.

“Structured literacy describes an approach to reading, writing, speaking, and listening instruction that is explicit, systematic, and intensive. In structured literacy, teachers logically sequence the presentation and integration of language components that contribute to skilled writing and reading comprehension. Instruction directly addresses skills, follows a continuum of skill complexity, and is supported with clear models, step-by-step demonstrations, and ongoing review. Research supports the use of structured literacy to maximize the learning of all students, including English Learners, those with dyslexia, and children with other learning disabilities. If implemented in core (Tier 1) instruction and tiered interventions, structured literacy may prevent or remediate reading difficulties in the vast majority of students at risk for academic concerns.”

ALL Ohio, 2022

Explicit and systematic foundational skills instruction includes:<sup>123</sup>

- Fostering students’ phonemic awareness and knowledge of letter names and sounds in early grades, including:
  - Developing awareness of the segments of sounds (phonemes) in speech and how they link to letters.
  - Teaching students to recognize and manipulate segments of sound in speech (phonemic awareness).
  - Teaching students letter–sound relationships (phonics).
  - Using word–building and other activities to link students’ knowledge of phonemic awareness and its relationship to letter–sound knowledge.
- Teaching students to decode words, analyze word parts, and write and recognize words, including:
  - Looking at letters from left to right within a word, blending corresponding sounds into words using continuous blending. Instructing students in common sound–spelling patterns.
  - Recognizing common word parts.
  - Reading decodable words in isolation and text.

Note: The practice of reading discussed here is not the same in all languages, rather there are languages that are read with different directionality e.g. Arabic, Hebrew, Persian, Urdu, Kashmiri, Pashto, Uighur, Sorani Kurdish, Punjabi, Sindhi, Chinese, Vietnamese, Korean, and Japanese as well as languages that have character based systems e.g. Kanji. It is therefore important that classroom teachers work closely with the English language development teacher in their school or district to ensure that multilingual learners are provided proper language supports to ensure that they are both developing their native language (L1) as well as English.

<sup>122</sup> [International Dyslexia Association, 2020](#)

<sup>123</sup> Foorman, 2023.

# Foundational Skills Development for Multilingual Learners

Multilingual learners’ literacy outcomes, as with all learners’ literacy outcomes, are directly related to the quality of evidence-based instruction they receive. The quality of instruction includes how the teacher responds to the student’s linguistic strengths and needs. Effective foundational literacy instruction builds upon the student’s home language and a diverse linguistic repertoire.

“Effective approaches recognize that early literacy development is occurring in the context of first and second (or subsequent) language development and leverage the dual language development process as children are introduced to the skills and practices of literacy.”

Herrera et al., 2022

When designing and implementing instruction for multilingual learners, the following considerations will help foster success.

## In All Languages: Start with Oral Language

Oral language proficiency and listening comprehension play a significant role throughout all stages of literacy development, increasingly so as students progress through the grades and the English-language demands of reading and writing increase.<sup>124</sup> When students have strong oral language skills and vocabulary in their home language, they are set up to recognize the sounds, words, and structures in another language. Multilingual learners are simultaneously developing their foundational literacy skills alongside their understanding of language. As a result, a stronger emphasis on the meaning of words in the language of instruction ensures they are able to make connections between the meaning of what they are reading and the skill of decoding words and text.<sup>125</sup> Additionally, multilingual learners need frequent opportunities to practice new language skills and concepts to support retention.<sup>126</sup>

## In All Languages: Build Phonological Awareness

Research suggests that the same principles of systematic and explicit phonologically-based support that undergird instruction for English-proficient students also benefit literacy development for students learning English.<sup>127</sup> Phonological awareness can be supported in early childhood classrooms through activities such as listening to and creating rhymes and word and language games. While there may be differences between languages, these activities can be practiced in both the home language and English. These strategic moves are effective ways to support children in focusing on the sounds of language, which prepares them for skills such as decoding words.

Different languages have different sets of phonemes, so it is especially important for multilingual learners to understand the similarities and differences in the two systems. “As children are introduced to the alphabet and exposed to text, the phonological distinctions between the sounds of their two languages become an essential element in preparing for foundational phonics skills and decoding in two languages.”

Herrera et al., 2022

124 Goldenberg et al., 2020

125 Goldenberg et al., 2020; Perfetti & Hart, 2002

126 Baker et al., 2014

127 August & Shanahan, 2010

## In All Languages: Develop Wide Vocabulary

Research is clear that high-quality vocabulary development be an intentional focus throughout a multilingual student's instructional day.<sup>128</sup> As children are developing language, it is important that they are exposed to books and texts that provide expressive and precise vocabulary in all of their languages. When educators can help students recognize the relationship between vocabulary in the home language and English, students benefit.<sup>129</sup> If the linguistic transfer involves a simple concept or a one-to-one correspondence between the student's primary language, teachers may be able to help students even when the teacher may know very little of the primary language. But if the concepts are difficult or there is no clear word for the concept in the student's native language, teachers will need more extensive knowledge of the primary language to be able to help the student.<sup>130</sup>

### KEY TAKEAWAYS

- Foundational skills in the teaching of literacy are essential.
- While oral language begins to develop naturally through incidental learning in the home and community, learning to read and write requires explicit instruction in foundational skills (print concepts, phonics, and phonemic awareness).
- Effective teaching of foundational skills requires explicit, systematic reading instruction and follows an intentional progression that:
  - moves early readers and writers along a continuum in the areas of print concepts, phonological awareness, phonics and word recognition, and fluency, and
  - provides daily opportunities to practice foundational reading and writing skills and to gain fluency with grade-level text (see Figure 8).
- Structured literacy instruction employs explicit, systematic, diagnostic, and responsive teaching of the language and literacy skills needed to be a successful reader and writer. This approach is beneficial for all, and critical for students experiencing reading disabilities, including dyslexia.
- Developing oral language, phonological awareness, and vocabulary across each language is particularly important for multilingual learners.
- Foundational skill areas are addressed in the Oregon English Language Arts and Literacy Standards for students in grades K–5.
- Reviewing, adopting, and supporting the implementation of high-quality instructional materials is one of the most important jobs of education leaders.

### LEARN MORE

- [English Language Arts and Literacy Standards \(from ODE\)](#)
- [Structured literacy instruction](#)
- [Foundational Skills to Support Reading for Understanding in Kindergarten Through 3rd Grade](#)
- [Reading 101: A Guide to Teaching Reading and Writing](#)
- [Evaluating Materials for Culturally Responsive Practices](#)
- [Reading Foundational Skills Key Concepts and Terms](#)
- [Planned Language Approach](#)
- [English Language Arts Curriculum Reviews](#)
- [Developing Foundational Reading Skills in the Early Grades](#)

128 [Baker et al., 2014](#)

129 [Herrera et al., 2022](#)

130 [Baker et al., 2014](#)

# Section 6: Writing, Reading Comprehension, Vocabulary, & Background Knowledge

Foundational skills are essential to breaking the code of written language; without the integration and connection to other literacy skills, however, they are insufficient for deep literacy learning. Despite the common refrain that children are “learning to read” in K-2 and “reading to learn” in 3-5, this framing separates building foundational skills from the application of foundational skills in ways that are misleading. The necessary relationship and sequencing of reading skills is illustrated in Figure 8.

It is true that as students increase their ability to automatically recognize letters, sounds, and words they have more access to understanding and expressing complex ideas and vocabulary. It is also true that the reciprocal relationship between foundational skills, background knowledge, vocabulary, reading comprehension, and writing is vital to a child’s literacy development K-5. The reading models underscore the interdependence of foundational skills alongside writing, vocabulary development, and language.<sup>131</sup> Given this, reading and writing for purpose, engaging with authentic texts, building background knowledge and vocabulary, and writing are all skills that are just as “foundational” to developing literacy skills.

Engaging students in literacy learning means being clear about why reading and writing matter. Creating purpose for literacy includes engaging students in learning about themselves and their world. Equally important is spotlighting actual examples where reading, writing, listening, and speaking have empowered people toward making a positive difference in their communities and the world. When students understand and experience the ways in which literacy correlates to agency and joy, purpose takes root. Part of being an effective reader and writer is understanding the uses and purposes of text as well as the power of text to communicate, convey information, narrate, and entertain. Children become readers and writers because they experience print as useful and books as beneficial or enjoyable.<sup>132</sup>



<sup>131</sup> B. Foorman, personal conversation, March 24, 2023

<sup>132</sup> [Herrera et al., 2022](#)

“[T]he relationship between letters and sounds is necessary and nonnegotiable when learning to read in alphabetic writing systems... Yet reading scientists, teachers and the public know that reading involves more than alphabetic skills.’ Good literacy instruction teaches these skills explicitly while building on what students already know (including their culture and home language); building background knowledge about the world to support reading comprehension; and integrating reading, writing, speaking and listening to provide reinforcement for understanding.”

Darling-Hammond, 2022

## Text-Rich Environment and Connected Text

Students should spend a substantial portion of their day engaged in listening to, reading, thinking, talking, and writing about texts. This means that each student should read connected text (starting with relatively short phrases, then sentences, then multiple related sentences, paragraphs, and longer narratives) every day to support reading accuracy, fluency, and comprehension.<sup>133</sup> The amount of time students spend reading and listening to text is a major contributor to the improvement in students’ vocabulary and comprehension.<sup>134</sup> One of the most efficient ways to learn vocabulary, in addition to receiving explicit vocabulary instruction, is to acquire it while reading. Recent research demonstrates that students learn up to four times as many words when they are reading texts about conceptually coherent topics for a period of time.<sup>135</sup> The selection of texts for classroom instruction will vary depending on the instructional purpose and the student’s reading ability. In general, students should have access to diverse genres and wide-ranging content, including both narrative and informational texts.

“Building knowledge need not—and should not—wait until students possess some level of foundational reading skills.”

ASCD, 2023a

## Building Background Knowledge & Vocabulary

As described in many of the models in [Section 4: Reading Models Based in Research](#), background knowledge and vocabulary play critical roles in students’ reading and writing abilities.

### Background Knowledge

There is a vast body of research that supports the role of background knowledge learned through oral language or print,<sup>136</sup> in students’ ability to make meaning of and comprehend text.<sup>137</sup> Developing knowledge allows students to, for example, choose between multiple meanings of words and make inferences from a text that require background knowledge. Background knowledge is key to understanding various elements of language, such as idioms, especially for emergent multilingual students.<sup>138</sup> Just as high-quality instructional materials are important in developing foundational skills, they are also critical to effectively building background knowledge over time.

133 [Foorman et al., 2016](#); Foorman, 2020

134 Wegenhart, 2015

135 Landauer & Dumais, 1997

136 [ASCD, 2023a](#)

137 [Student Achievement Partners, 2015](#)

138 [Neuman et al., 2014](#)

“[O]nce print has been decoded into words, reading comprehension and listening comprehension requires the active construction of inferences that rely on background knowledge and are implicit in the text.”

Neuman et al., 2014

Designing a school day that includes a broad range of subject areas, such as science and social sciences, is important for a well-rounded education. It also enhances a student’s exposure to vocabulary and content knowledge on a broad range of topics. This leads to an increased ability to understand and build knowledge through creating connections to and between new texts, having a compounding effect on students’ reading comprehension.<sup>139</sup>

## Equity Implications of Knowledge as a Critical Component of Literacy

In many classrooms, instruction and assessments can privilege those with knowledge of certain elements of a dominant culture or pattern of topics.<sup>140</sup> Regardless of cultural or economic background, all students enter classrooms with a wealth of knowledge that is steeped in culture and ways of being. By affirming this and acknowledging that background knowledge is not fixed, educators can extend what students already know through inquiry, careful planning, and purposeful engagement. Because background knowledge plays a pivotal role in reading comprehension, educators need to continually reflect on the question, “Whose knowledge is being privileged, and how do we ensure we are working from the background knowledge of each student and developing shared understandings?”

For multilingual learners, connecting literacy instruction to students’ background knowledge is critical. Multilingual learners often encounter concepts or events in texts that are outside their cultural and life experiences, yet students can grasp many of these concepts by identifying larger themes that correlate with their own lived experiences.

## Strategies for Building Knowledge

It is important that building knowledge does not result in simply having students memorize facts, but rather engaging students in activities that develop “knowledge networks” that are grouped and related in domain-specific ways for current and future learning.

<sup>139</sup> [Willingham, 2006](#)

<sup>140</sup> [Neuman, 2019](#)

Some strategies for building knowledge include the following:<sup>141</sup>

- Teach words in categories, prompting students to generate and identify patterns.
- Teach concepts and related categories through contrasts, comparisons, and analogies.
- Encourage reading and writing not only across a wide range of topics, but also widely within a focused topic, preferably aligned with student interest.
- Leverage multimedia and experiential learning to provide knowledge and word-rich learning experiences for all students.
- When selecting instructional materials, consider how the curriculum is designed to build student knowledge throughout their early grades and beyond.
- Ensure a well-rounded learning experience for students that avoids “curriculum narrowing,” or teaching only a narrow set of subjects.
- Elicit and build on students’ existing background knowledge to make connections and when teaching new topics or concepts.

Additional shifts in instructional practice that build knowledge are described in Table 3 below.

**Table 3. Building Knowledge & Vocabulary<sup>142</sup>**

<b>Instead of This:</b>	<b>Do This:</b>
Selecting texts based on what texts are most familiar and known to the teacher...	Ensure that the texts and topics used reflect the full range of identities in the classroom and community, serving to affirm all students’ lives, languages, perspectives, and histories.
Providing multilingual learners with lower-level or simpler texts and prompts...	Make use of texts and topics where students can use and leverage knowledge from their lives and experiences. This can also be done through the use of paired texts, where knowledge is built in both languages of instruction.
Regularly reading aloud “on-level” student texts with limited opportunities to grow knowledge and vocabulary...	Select books for read-aloud that are far more complex than students can read on their own (1–3 years above what most students can read independently).
Planning read-alouds to teach isolated skills, strategies, or standards (e.g., “This week is author’s purpose week...”)	Keep the text at the center of your planning. Plan standards-aligned questions, tasks, and activities that help students unpack the ideas of the text while drawing on their own funds of knowledge and many skills, strategies, and modes of co-constructing meaning.

<sup>141</sup> [Neuman et al., 2014](#)

<sup>142</sup> [Student Achievement Partners, n.d.-a](#)

# Vocabulary

The richness of children’s oral language serves as an important precursor to their active working vocabulary, generating a repertoire of academic language and translating directly to their ability to actively understand and enjoy what they read. Most vocabulary growth occurs when children encounter new words in texts or talk and activate their schema to infer the meaning of the word. The more expansive a child’s vocabulary is in early grades, the easier it is for them to decode text, read with fluency, and comprehend at grade level. “Word and world knowledge are reciprocal and mutually reinforcing” and support reading comprehension.<sup>143</sup>

Morphology refers to “the knowledge of meaningful word parts in a language (typically the knowledge of prefixes, suffixes, and/or roots and base words).” Knowledge of word structure and how words are formed is linked to both greater vocabulary development and stronger reading comprehension. Research has shown that in children as young as first grade, knowledge of word parts has influenced their literacy development .

Massachusetts Department of Elementary and Secondary Education, 2023

Vocabulary and morphology knowledge are supported by explicit teaching in word meaning, word parts, and spelling. Current vocabulary research confirms the benefits of explicit teaching over implicit teaching in promoting vocabulary development.<sup>144</sup> Research also demonstrates that “teachers need to show the spellings of new vocabulary words when they discuss their meanings. Similarly, students need to stop and pronounce unfamiliar words rather than skip them during independent reading.”<sup>145</sup>

Intentional and ambitious efforts to build vocabulary include the following strategies:<sup>146</sup>

- Select grade-level academic vocabulary words to teach from read-alouds of literature and informational texts and content area curricula.
- Introduce word meanings to children during reading and content area instruction using child-friendly explanations and provide opportunities for children to pronounce the new words and to see the spelling of the new words.
- Provide repeated opportunities for children to review and use new vocabulary over time, including discussing ways that new vocabulary words relate to one another and children’s existing knowledge, addressing multiple meanings or nuanced meanings of a word across different contexts, and encouraging children to use new words in meaningful contexts (e.g., discussion of texts, discussions of content area learning, semantic maps).
- Encourage talk among children, particularly during content area learning and during discussions in response to a text or new learning.
- Teach morphology (i.e., the meaning of word parts).

“Instructional implications are that teachers should include written words as part of vocabulary instruction and that students should pronounce spellings as well as determine meanings when they encounter new vocabulary words... Students who see the spellings of words actually learn the meanings of the words more easily — orthographic knowledge benefits vocabulary learning.”

Rosenthal & Ehri, 2008

143 [ASCD, 2023b](#)

144 [Butler et al., 2010](#)

145 Ehri & Rosenthal, 2007

146 [Michigan Association of Intermediate School Administrators General Education Leadership Network Early Literacy Task Force, 2016](#)

# Reading Comprehension

Reading comprehension describes the process of constructing meaning through interaction with a text to understand what an author has stated, explicitly or implicitly. This interaction and meaning-making also draws on what the reader brings to the text, including their background knowledge, abilities, and experiences.<sup>147</sup> The comprehension of written language (i.e., reading comprehension) requires that the components of language and components of the alphabetic principle be activated along with background knowledge, executive function, and motivation.<sup>148</sup> Comprehension and knowledge building should work synergistically with foundational skills learning (see Figure 8). The following strategies come from the Institute of Educational Science practice guides.<sup>149</sup>

**Teach students how to use reading comprehension strategies.** Examples of effective reading comprehension strategies include activating prior knowledge, questioning, visualizing, monitoring, clarifying, drawing inferences, and summarizing. When teaching comprehension strategies, do not overfocus on or teach the strategy in isolation; stay text-focused and ensure that the purpose of strategy instruction is for a deeper understanding of a complex text. When engaging in a text together, the teacher can model and explain when, how, and why to implement a particular strategy to help with understanding, and then they can guide students through practice until students learn to use the strategies themselves.<sup>150</sup>

**Teach students to identify and use the text’s organizational structure to comprehend, learn, and remember content.** Reading research indicates that being able to identify and use text structures can be an important skill in comprehending text. For example, the RAND Reading Study Group<sup>151</sup> concluded that text structure is an important factor in fostering comprehension. Students who are aware of text structure organize the text as they read, and they recognize and retain the important information the text reveals.

Simply put, text structure refers to the characteristics of written material and the way that ideas are constructed and organized. In other words, text structure is the arrangement of ideas and relationships among the ideas. Text structure organization exists in both narrative and expository structures. Oregon’s K-12 English Language Arts and Literacy Standards call for equal attention to fiction and nonfiction text; therefore, it is critical that students learn to recognize and use strategies for both types of texts. Many students start school with an awareness of narrative text structures, but fewer students have an awareness of expository text structure. This is due, in part, to the fact that most of the reading that parents and early childhood teachers do with their preschool children is from storybooks.

Most students enter school with a basic understanding of narrative structure, although some students with less exposure to storybooks may need to be taught this structure directly. Narrative text follows a singular general structural pattern, often referred to as story grammar. This often includes the elements of setting and main character, an initiating event and reaction, solution attempts, the outcome of these attempts, and the ending reaction.

147 [Shanahan et al., 2010](#)

148 Foorman, 2023

149 [Foorman et al., 2016](#); [Graham et al., 2012](#)

150 [Shanahan, 2018](#)

151 [Snow, 2002, p. 40](#)

When teaching expository text structure, many researchers reference five primary text structures, including<sup>152</sup>:

- **Collection:** The author lists items or events in some manner. A listing becomes more organized when it is sequenced by time of occurrence.
- **Description:** The author provides information about a certain topic, e.g., attributes, characteristics, etc.
- **Causation (Cause/Effect):** The author delineates one or more causes and then describes the ensuing effects.
- **Problem/Solution:** The author poses some type of problem or question and then generates the answer.
- **Compare/Contrast:** The author compares and contrasts two or more similar events, topics or objects.

Although this classification system makes distinctions between these five different types of text structures, in reality, most texts include a mixture of these structures. The rationale behind teaching text structure is that by teaching students to recognize common patterns within different types of structures, they will be better able to identify the macrostructure formation or gist of the text including main ideas and how these ideas fit together which, in the end, will result in improved comprehension.

**Guide students through focused, high-quality discussions on the meaning of text.** Research shows that teachers should give students ample opportunities to respond to higher-order questions that require them to reflect on the text and engage in discussions with peers.<sup>153</sup> Reading comprehension improves when teachers ask students follow-up questions and encourage students to refer back to the text. Authentic classroom discussion allows students to share and expand their thinking and use language in new ways. Specifically, discussions about texts provide opportunities for students to collaboratively build knowledge that supports their literacy development and strengthens their reading and writing skills. Multilingual students especially benefit when they are able to have these discussions in multiple languages. Students' overall reading development is supported when they have opportunities to respond to texts both verbally and in writing.<sup>154</sup>

**Select complex and diverse texts purposefully to support comprehension development.** Reading comprehension should be taught using multiple genres of texts that reflect and positively affirm the lives, languages, perspectives, and histories of the students in the classroom and all members of society. All students should have ample opportunities to read and/or listen to complex texts that provide an appropriate level of rigor, align with grade-level standards, and support the purpose of instruction. For instance, the complex texts selected should represent a range of narrative and informational genres to support students' development of knowledge and vocabulary.<sup>155</sup> Providing students access to complex texts through independent and shared reading experiences generates opportunities to stretch their literacy skills while simultaneously building their world knowledge and vocabulary. Research also recommends utilizing complex texts that integrate other disciplines to support the balance of skills-based and knowledge-based competencies in early literacy instruction.<sup>156</sup>

Establish an engaging and motivating context to teach reading comprehension. Motivation and engagement play an important role in reading comprehension. The following teaching practices can support student motivation: making literacy experiences more relevant to students' interests, everyday lives, or important current events; providing a positive learning environment that promotes student choice and autonomy in learning; acknowledging and affirming student success (self-efficacy); encouraging collaboration with peers; and planning thematic units that draw connections between content areas. Teachers spark students' interests by choosing texts with themes that are relevant and engaging.

152 Meyer & Freedle, 1984

153 [Murphy et al., 2009](#)

154 [Graham & Hebert, 2011](#); Wegenhart, 2015

155 Wegenhart, 2015

156 [Shanahan et al., 2010](#)

# Writing

Good writers are good readers. Writing gives voice to children’s inner thoughts, lived experience, and creative imagination and allows a way for them to be expressed and shared with the world. As a form of communication, writing can transcend time and is a way to pass stories from generation to generation. Writing is an essential component of children’s learning, not only for the value it has for literacy development, but for the value it has as a medium for expression, discovery, and creativity. Writing nourishes the human spirit.

“Children want to write. They want to write the first day they attend school. This is no accident. Before they went to school, they marked up walls, pavements, newspapers with crayons, chalk, pens or pencils...anything that makes a mark. The child’s marks say, ‘I am.’”

Graves, 1983

Writing focuses students on phonics, comprehension, mechanics, developing voice or perspective, word choice, and communicating a perspective to others. Through writing, they learn more about the alphabetic principle and they also discover their writer’s voice and learn to articulate their ideas, their opinions, and their feelings. Writing accelerates language and reading skills, and serves as a catalyst for students to solidify foundational skills and as a creative outlet for them to emulate story and text structure. Schools can deepen literacy learning by providing high-quality, standards-aligned<sup>157</sup> explicit instruction in writing throughout the school day, both integrated into content learning through disciplinary literacy practices and as its own discrete instructional time.

## Writing and Reading as Reciprocal, Complementary Processes

Writing and reading are reciprocal practices that mutually reinforce a student’s literacy learning.<sup>158</sup> Reading pulls words and ideas off a page to give them meaning; writing moves ideas, arguments, and dreams from the writer’s heart and mind onto the page, to be shared with others. Reading is a receptive domain of literacy, while writing is the expressive or productive domain of literacy. Because reading and writing in English both require knowledge and familiarity with the alphabetic orthography of the language, it is not surprising that these two fundamental literacy skills are closely related. Table 4 includes examples of the similarity in how students process various information when writing and reading.

**Table 4. Common Ground Between Writing and Reading**

Strategic Processing	Writer	Reader
Searching for meaning	Generates ideas with an audience in mind	Uses print to construct meaning
Monitoring for meaning	Checks that the message makes sense	Checks that the message makes sense
Searching for structure	Anticipates the order of words based on how book language and oral language sound	Groups words together in phrases to represent the intended message

<sup>157</sup> [ODE, 2019](#)

<sup>158</sup> [Sedita, 2019](#)

Strategic Processing	Writer	Reader
Monitoring for structure	Checks the order of words supporting the intended message	Re-reads (out loud or holding the message in the mind) to check that the word order communicates the intended message
Searching for graphophonic information	Uses knowledge of how letters, words, and print work to record the message	Seeks out graphophonic input from print in relation to meaning and structure
Monitoring for graphophonic information	Checks and detects any discrepancies between anticipated message and graphophonic input	Checks and detects that the print represents the message
Self-correcting	Detects and corrects	Detects and corrects

Explicit instruction in writing is needed in addition to explicit instruction in reading, because although these language tasks may rely on similar processes, they are nonetheless independent skills that require students to apply their knowledge of the grapho-phonemic code, spelling, and other elements of reading.

The connection between reading and writing is also evident in the Oregon English Language Arts and Literacy Standards<sup>159</sup> for students in grades K–5.

## Writing Skills

Writing skills can also be thought of in two interrelated groups, transcription and translation.<sup>160</sup>

**Transcription (handwriting, spelling, conventions, keyboarding):** Transcription is the process of transferring one’s thoughts and ideas into words and putting those words on paper or typing them on a keyboard. Transcription skills include letter formation, handwriting and keyboarding fluency, spelling, and conventions, including punctuation and capitalization. These skills are the technical foundation of written composition. Students need explicit instruction in these skills and time to process them and develop and apply the skills for meaning. Spelling in English relies on attaching sounds to letters, breaking words into syllables, and attending to the parts of words that have meaning, such as roots, prefixes, and suffixes. Automaticity of transcription can accelerate written expression and increase both the length and quality of written work. Students who struggle with transcription skills may have difficulty expressing their ideas in writing.

**Translation (grammar, sentence structure, writing process, text structure):** Translation involves generating and organizing ideas into written words, phrases, sentences, and paragraphs. It focuses more on the process of writing, which includes planning, drafting, revising, and editing. Translating can be taxing for beginning writers, so direct instruction and time to practice are important for writing success. Students who have not mastered transcription skills might require greater teacher support throughout the planning process. Supports can include providing writing prompts, modeling translation behaviors, and providing sentence stems and paragraph frames along with graphic organizers. For students to achieve full mastery of writing, educators provide instruction across various genres (narrative, informative/explanatory, and opinion), with an explicit focus on the different text structures and sentence composition qualities of each genre.

<sup>159</sup> [ODE, 2019](#)

<sup>160</sup> [Michigan Department of Education, 2021](#)

## Spelling

As with all literacy skill-building, each student has their own unique needs. Spelling reinforces other literacy learning. Learning the rules of spelling can help students understand phonics, orthography, morphology, and vocabulary.<sup>161</sup> Many of the same rules apply to reading as to spelling.<sup>162</sup> While English may seem to be less patterned than some languages, most word spelling can be accounted for by meaning, language of origin, part of speech, and sound-spelling combinations.<sup>163</sup> Students benefit from explicit instruction in the rules of spelling, so that they need not rely on memorization alone to be successful spellers. While most basal instructional materials include spelling words, these words will not necessarily meet the needs of all students. Rather, it is recommended that teachers find differentiated materials in order to engage in developmentally appropriate spelling instruction.<sup>164</sup>

Some research-based recommendations for teaching spelling include:<sup>165</sup>

- Establishing weekly routines for spelling instruction.
- Giving students ample opportunities to practice words and providing immediate feedback.
- Creating explicit connections between word knowledge and content learning.
- Providing students opportunities to generalize their spelling skills to writing.

## Instructional Design for Teaching Writing

Four evidence-based recommendations for writing instruction follow:<sup>166</sup>

- **Provide time daily for students to write, including time for explicit instruction in writing skills.** This writing instruction should be appropriate to the students' grade level and can be embedded within other content areas of instruction through disciplinary literacy practices, such as science report writing, historical fiction as part of social science, or describing the process used to solve a math problem. School leaders and classroom teachers must ensure that sufficient time is dedicated each day for both writing instruction and student writing practice, with writing occurring across the curriculum. Instructional time at the elementary level should focus on increasing fluency in foundational skills including spelling and handwriting. However, instruction should not focus exclusively on the mechanics of writing; rather, it should also teach higher-level writing skills such as strategies for planning, writing, and revising text as well as other grade-specific standards.
- **Teach students to use the writing process for a variety of purposes** and to understand that planning and specific strategies help writing meet its goals.
  - **Writing strategies.** Although an informal instructional approach may be all the support some students need, many other students need explicit and scaffolded instruction from the teacher in order to become proficient writers. Teachers can develop a plan for the explicit instruction of writing strategies across the grades and within grades in order to address students' immediate growth opportunities. Strategy-based instruction has been shown to have a substantial effect on the quality of students' writing. Writing strategies can range from strategies for brainstorming and revising to strategies designed to develop writing-specific genres such as personal narratives, persuasive essays, or research reports. The ultimate goal of strategy development is for students to achieve automaticity in using these strategies independently. These strategies will, in essence, become the "invisible knowledge" that students carry in their heads while engaging in writing tasks.

161 [Institute for Multi-Sensory Education \(IMSE\) Journal, 2020](#)

162 [Moats, n.d.](#)

163 [Moats, n.d.](#)

164 Schlagal, 2007

165 Troia & Graham, 2003

166 [Graham et al., 2012](#)

- **Diverse genres of writing.** Introduce students to multiple genres of writing beginning in the early elementary grades alongside a discussion about the different purposes those genres can accomplish. The practice of reading a variety of books to young children has been shown to support their beginning acquisition of genre knowledge, and, as genre knowledge grows, so do children’s abilities to apply that knowledge to their own writing.<sup>167</sup>
- **Teach students to become fluent with handwriting, spelling, sentence construction, and typing.** Effortless proficiency in basic writing skills allows students to focus on organizing their thoughts and exploring deeper meaning making; elementary school is the time when students develop these essential skills. Many students who struggle with handwriting may also struggle with automatic keyboarding. Teachers should therefore provide explicit instruction in both handwriting and keyboarding.
- **Create an engaged community of writers.** Students who see themselves as writers feel greater motivation to apply the skills and internalize the writing process. Student learning is helped by sharing their written work with an authentic audience, seeing their words in print, collaborating on writing projects, and learning to give and receive feedback about writing.

#### KEY TAKEAWAYS

- Foundational skills are essential to breaking the code of reading; however, they are insufficient for deep literacy learning without the integration and connection to other literacy skills.
- As students master foundational skills, instructional time shifts toward the development of other literacy skills as students begin to use texts to learn content.
- Building background knowledge should be enacted in culturally responsive ways by asking questions like, “Whose knowledge is being privileged?” then ensuring multiple perspectives are included.
- Building vocabulary ensures students are able to make meaning of the words and comprehend the text they are reading.
- Building and expanding students’ background knowledge allows them to comprehend the words they are reading as they develop foundational skills.
- Writing practice helps students solidify and make sense of foundational skills, allows them a creative outlet to emulate story and text structure, and creates opportunities to connect in meaningful ways with the world around them.
- Reading comprehension and writing instruction permeates all grades.

#### LEARN MORE

- [Core \(TIER 1\) Instructional Strategies to Improve K-4 Reading Comprehension](#)
- [Early Literacy Development](#)
- [Self-Regulated Strategy Development](#)
- [Looking to Research for Literacy Success](#)
- [Promoting Preschool Writing](#)
- [Teaching Elementary School Students to Be Effective Writers](#)
- [Comprehension Research and Resources](#)
- [Importance of Writing Instruction](#)

<sup>167</sup> Donovan & Smolkin, 2006

# Section 7: Core Instruction & Assessment

Core instruction is the highest-leverage investment for improving early literacy. Whether a teacher is using whole group instruction, differentiated small group instruction, guided instruction, or providing independent practice, the core literacy block provides critical access to standards-aligned learning experiences. Additionally, the use of high-quality instructional materials provides a common foundation for schools to align their curriculum to standards and collaborate on any needed adjustments or supplementary materials. When schools design professional learning systems that provide educators with opportunities to reflect on lesson design and examine instructional practices, literacy instruction is strengthened, and students benefit.<sup>168</sup> Consistent access to core instruction, which includes exposure to grade-level text, tasks, and talk, is a key equity lever for children learning to read and write.

## Supporting Students in Accessing Core Instruction

All students should receive core instruction that is differentiated to address individual needs. While some students will have their needs met through core instruction alone, others may need the additional support provided through supplemental, targeted, skill-based small group instruction in addition to the core (core + more).

In order to reach and respond to the learning needs of each student, educators need to know what those needs are. It is through assessment that educators gain this knowledge and are therefore able to tailor the instructional experience. When instruction matches where students are in their learning and is provided in an inclusive, culturally and linguistically responsive, and identity-affirming context, it creates an optimal learning environment. Additional support and interventions may be needed to build upon core instruction to support individual student needs.



<sup>168</sup> [Gates Foundation, 2017](#)

## Core + More

Equitable access to core instruction necessitates that all educators understand the elements of instructional design. Educators need to know and understand how reading develops, how to align instruction to grade-level standards, how to identify where each student is on the learning progression, and how to effectively use differentiated practices and tiered instructional supports to move students forward in their literacy learning.

It is important to ensure coherence in high-quality instructional materials, strategies, language of instruction, and routines across the support continuum to avoid “curricular chaos” and to create a connected literacy learning experience for students. Instruction at all levels should be explicit and systematic, provided by highly-qualified educators, and focused on leveraging students' strengths while addressing their needs.

### IS CORE+MORE REALLY TALKING ABOUT MULTI-TIERED SYSTEM OF SUPPORT (MTSS)?

The phrase Core+More captures the central purpose of MTSS as an organizing framework designed to responsively meet the strengths and needs of all students. It highlights the importance of every student receiving strong core instruction while also providing specific, targeted skill instruction as needed. Core+More describes the data-informed intensification of instruction that happens within a multi-tiered system of support.

“MTSS is a framework for how school districts can build the necessary systems to ensure that each and every student receives a high quality educational experience. It is designed to support schools with proactively identifying and addressing the strengths and needs of all students by optimizing data-driven decision-making, progress monitoring, and the use of evidence-based supports and strategies with increasing intensity to sustain student growth.”<sup>169</sup>

Starting planning from the vantage point of how individuals learn makes instruction more effective for all. Application of the Universal Design for Learning Guidelines<sup>170</sup> is especially helpful in this, as they prompt educators to consider engagement, representation, action, and expression when designing instruction. High-quality core literacy instruction for all students can be supplemented and extended to support individual needs through differentiation and small-group instruction.

When core instruction and targeted, strategic support is insufficient to meet a student’s individual needs, then more intensified and individualized support (core + more + more), based on progress and patterns of response, is needed. All instructional support for students with reading and writing difficulties should be provided in addition to high-quality core literacy instruction. An effective tiered instructional support plan will ensure that the right instruction is delivered with the right level of intensity and duration to the right students at the right time.

The National Center on Intensive Intervention [Tools Chart](#) provides information about published intervention programs that can aid in a district’s design of a continuum of academic supports. The Florida Center on Reading Research’s Student Center Activities<sup>171</sup> are sets of discrete low-resource activities that students can complete independently or in small groups, organized along the progression of foundational reading skills. These activities may be used to supplement core instruction in areas where student differentiation needs are not matching offerings within the district’s curriculum.

169 [DESE, 2020](#)

170 [CAST, 2018](#)

171 [Florida Center for Reading Research \(FCRR\), 2021](#)

# Assessment as an Accelerant for Learning and Prevention

The term “assessment” comes from the Latin term *assidere*, which means to “sit beside.” It draws a picture of a child and teacher, connected through a relationship and focused on helping the child identify their strengths and their next learning steps. When assessing students, educators have the opportunity to uplift a child’s sense of self and agency as a learner by highlighting what they can do well and what they are ready to learn next. The relationships between educator and student are nurtured through honoring the knowledge students bring from their own lived experiences and cultures, their home language, and interests. Assessment in its purest form serves to accelerate student learning, contribute to student efficacy and engagement, identify areas for further support, and deepen the relationship between teacher and learner.

**Assessment Guiding Principles:**<sup>172</sup> These overarching principles situate assessment practice within a larger set of values to ensure maximum access and learning opportunity for children.

- Assessments should be used to determine how to bring students into grade-level instruction, not whether to bring them into it.
- The formative assessment process is the strongest tool to support and accelerate learning and growth.
- Targeted checks using curriculum-based assessments will support instruction; use of diagnostic assessments and/or formative practices are essential.
- All assessments should be given within a larger context that supports students’ social, physical, and emotional wellbeing, honors relationships, and uses culturally responsive practices.

Both general education teachers and specialists use assessment data to learn about student needs and offer increasing levels of support through differentiated core instruction within the general education setting. Progress monitoring data gathered through curriculum-based measures and other formative and interim assessment tools help general education teachers and specialists plan and adjust instruction.

## ASSESSMENT AND MULTILINGUAL LEARNERS

Multilingual learners need effective and appropriate assessment and instruction. Lacking this, they risk becoming long-term English learners who suffer diminished opportunities to learn and fall so far behind their English-speaking peers that it is difficult for them to catch up and graduate high school. Literacy assessments that are designed for bilingual learners and responsive to their native language are desperately needed to promote effective literacy instruction for dual language learners and English learners to avoid the over or under-identification of multilingual learners for special education.

Adapted from Escamilla et al., 2022

Formal tests are designed for a specific purpose. It is important to consider the responsible uses described in Table 5; when used in other ways, these test results—especially the foundational skills screeners—could lead to inappropriate groupings that remove learning opportunities. Additionally, all tests include error, and no score should be deemed objectively true. When multiple methods are used for their intended purpose, the data can help educators understand where students are in the learning process overall and can identify the next instructional moves.

<sup>172</sup> Adapted from [Michigan Department of Education, n.d.](#)

## Formative Assessment Practices

Formative assessment information is immediately useful for instructional decision-making and provides important depth when interpreting test data. The cloth of effective early literacy instruction is woven with the threads of the formative assessment process.<sup>173</sup> Formative assessment is a planned process to elicit evidence of student learning in order to improve student understanding of the intended learning outcomes. Formative assessment is a process of collecting and responding. The information gained about student learning is used in the course of instruction to respond to and adjust instruction. In addition, formative assessment practices support students to become more self-directed learners.<sup>174</sup>

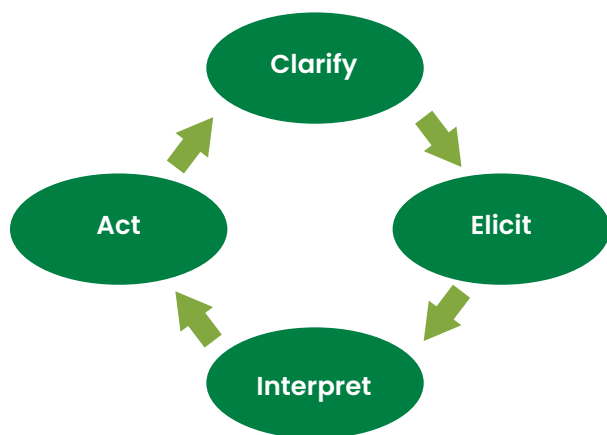
### Formative assessment answers the questions:

- “Where are we going as students and teachers?”
- “Where are we now?”
- “How do we get to the learning target?”

### The fundamental principles of the definition provided above is that formative assessment:

- is a planned, ongoing process
- occurs during teaching and learning
- intended to elicit and use evidence of student learning
- focused on disciplinary learning
- supports students becoming more self-directed learners

Figure 9. Formative Assessment Process



This planned, ongoing formative assessment process starts with **clarifying** learning expectations, then **eliciting** evidence of learning and **interpreting** that evidence in order to understand the status of the student’s learning. Based on this information, the educator and student can then make an informed decision about the next learning experience for the student (**act**). In early literacy instruction, this may look like showing a student how to shape their tongue to make a “t” sound and pressing the tongue against the front teeth, asking the student to show the teacher what that looks like, then asking the student to make the “t” sound and discussing how close to success they got.

Examples of formative assessment in practice:

- Journals or learning logs to show growth over time in a portfolio
- Academic conversations to explain new learning
- Graphic organizers to structure note-taking
- Student-teacher conference or small group discussions to recount learning

<sup>173</sup> [Smarter Balanced, 2022](#)

<sup>174</sup> [Formative Assessment for Students and Teachers \(FAST\) State Collaborative on Assessment and Student Standards \(SCASS\), 2018](#)

- Exit slips to show “I think..”, “I wonder...”, “I still want to know...”
- Fill-in-the-blank or “cloze” activity using sentence frames
- Reciprocal teaching
- Recording student language through technology
- Drawing or role playing
- Gallery walk of student work where students give each other feedback on stickies
- Word or concept sorts based on unit themes or student-created categories
- One word or one phrase response using whiteboards
- Self-checklist or peer-checklist
- Label or sequence visuals like pictures, photos or realia (real life objects)
- Student-generated questions for peers

Formative assessment practices rely on multiple feedback loops, including conversations between learners and their teachers. Providing and accepting feedback is most effective when conducted with an asset-based approach, as students who are on the edge of their learning need to know that they are capable of reaching the next level in their learning progression. When providing effective corrective feedback, educators communicate that they are holding the learner to high standards because they believe the student is capable and can meet those standards. They also provide the student with specific actionable steps to work on. This type of asset-based and actionable feedback is an effective strategy for all student learning, and especially important for students who have been historically underserved.<sup>175</sup>

#### ASSET-BASED FEEDBACK PROTOCOL <sup>176</sup>

1. Begin with rapport building check-in. Take time to connect.
2. State explicitly the purpose of your meeting and affirming your belief in the student’s capacity as a learner. Provide evidence by citing progress and growth in other areas.
3. Validate the student’s ability to master the learning target while acknowledging high demands of the task. Analyze the task together, identifying the easy and hard parts.
4. Deliver feedback that is specific, actionable, and timely. Restate what the final goal is and what mastery looks like and then show them where they are in relation to the goal.
5. Create space for them to react to what they heard and how they feel about it.
6. Provide specific actions to take to improve, and ways to track their progress.
7. Ask the student to paraphrase what they heard you say- what is wrong, what needs to be fixed, and how to go about fixing it.
8. Offer emotional encouragement and restate your belief in them. Do not skip this part.
9. Set up a time to follow-up and check progress.

The [Formative Assessment Rubrics, Reflection, and Observation Tools to Support Professional Reflection on Practice](#) is a peer assessment resource that educators can use to support one another in developing robust early literacy formative assessment practices in the classroom.

<sup>175</sup> [Cohen et al., 1999](#)

<sup>176</sup> Adapted from Hammond, 2014

## Early Literacy Tests

Some tests are helpful for seeing how learning is progressing and finding out where to get curious about specific student needs. For example, this could include recording student oral reading skills and noting errors in a reading passage then tracking progress over several weeks. State and district summative tests, by contrast, show how well systems are meeting the needs of groups of students and can be used to identify patterns that speak to inequities and places where additional evidence and inquiry is needed. Norm-referenced tests compare a student to others; criterion-referenced tests compare a student to domain proficiency; and, individual, or ipsative assessment compares a student to their previous performance. Table 5 provides information about these different kinds of tests and purposes.

The [Evidence-based Assessments in the Science of Reading Cheat Sheet](#) speaks to the how, why, what, and when of early literacy assessments, as well as providing an analogy and example of each. In many ways, this “cheat sheet” effectively summarizes Table 5.

**Table 5. Applied Purposes and Uses of Common Early Literacy Tests**

Applied Purpose	Descriptions and Responsible Use
<b>Universal Screening</b>	<p><b>Description:</b> Help determine where to be curious and find out more about where student learning needs acceleration through diagnostic evaluation processes. Relatively fast and efficient to administer. These screenings may occur early in the year, mid-year, and at the end of year.</p> <p><b>Responsible Use:</b> Most impactful when teachers observe or conduct the screening process and document specific areas of strength and identify those early literacy skills that need more attention by watching what students are able to do and where their learning edges are during testing. Universal screeners do not encompass the full breadth of English Language Arts standards; therefore, they should not be used as the <i>only</i> tool for placing students into reading-level groups or for determining program eligibility.</p>
<b>Diagnostic</b>	<p><b>Description:</b> Informal or formal. Designed to assess specific skills or components of reading, such as phonemic awareness, phonics, fluency, comprehension, and vocabulary, that individual students may need more support with. Results inform core instruction and possible opportunities for support.</p> <p><b>Responsible Use:</b> Identify specific skill areas that a student needs to master in order to expand further learning opportunities. <i>Used sparingly and intentionally. Few students need this kind of in-depth reading test, so use should be rare.</i></p>
<b>Progress Monitoring</b>	<p><b>Description:</b> Short, targeted assessment approaches that are aligned to a specific skill and can be given at regular intervals to track student change over time.</p> <p><b>Responsible Use:</b> Reviewing a student’s progress toward acquiring specific, discrete skills taught. Best when used efficiently and in combination with other sources of information to help guide instruction.</p>

Applied Purpose	Descriptions and Responsible Use
Interim	<p><b>Description:</b> Periodically administered tests that target specific chunks of content, typically a unit or related set of units. This includes approaches that some educators call “classroom summative” tests, which come at the end of a unit or term, as they are within-school-year practices. What educators in Oregon often refer to as “Common Formative Assessments” are actually interim tests (formative assessment is a process, not a test).</p> <p><b>Responsible Use:</b> The most effective tests can be used by students and educators alike, and are best used as tools to determine how well students responded to the instruction they just experienced. Interim tests are best used as tools in the hands of teachers, informing how well students are learning what is being taught periodically throughout the year.</p>
State Summative	<p><b>Description:</b> Oregon’s summative English language arts test blueprints include multiple standards: reading (40% of items), writing (40% of items), research (10%), and listening (10% of items). The test scores are thus indicative not just of reading, but of literacy. Oregon’s state English language arts summative tests are criterion-referenced tests that do not assess foundational skills in literacy; they generally focus on comprehension and writing of grade-level text. State summative tests are designed to sample all grade-level standards in their full depth, breadth, and complexity within a specific content area or domain, providing evidence of how well curriculum and instruction have been designed to meet the reading, writing, research, and listening learning needs of all student groups annually as part of program evaluation.</p> <p><b>Responsible Uses:</b> Program evaluation, longitudinal review of trends for student groups, identification of where to invest resources. State summative test results should not be used to set goals for teacher evaluation or to make high-stakes student decisions (e.g., course placement, Talented and Gifted identification, etc.).</p>

## Coherent, Comprehensive, & Continuous Assessment Systems

Strong assessment systems tend to the 3Cs of effective assessment: coherent, comprehensive, and continuous.<sup>177</sup>

- **Coherent:** All aspects of early literacy assessment and instruction align with Oregon’s language arts standards. The assessment system provides clear information about learning, so educator instructional practices align with what students need to learn next.
- **Comprehensive:** The approach taken to early literacy assessment provides multiple types of tests (universal screening, diagnostics, progress monitoring, interim tests, and summative tests) and is rooted in robust formative assessment practices. Informed decisions can be made in the moment, periodically throughout the year, and annually to drive improvement of literacy curriculum and instruction.
- **Continuous:** Early literacy assessment allows for assessment practices that drive the collection and review of the evidence of reading and writing learning that connects to prior learning and identifies the next steps across the school year.

<sup>177</sup> [Marion et al., 2019](#)

When the 3Cs are in place, the basic conditions are established for educators to use data and evidence from multiple sources to improve practice and make informed decisions about student learning. When clear alignment to the full depth, breadth, and complexity of standards is present across assessment practices, coherent responses to test data are feasible.

Leadership helps to create the conditions for classroom educators to be successful and reflective about their literacy instruction by 1) providing data review protocols and protocols for observing practice and reflecting and 2) creating time for grade-level data teams to meet and discuss both data and practice. In addition, another important condition is creating a data culture where unequal test results are seen as evidence of unequal learning experiences. In such a context, data sparks a determination to identify ways to improve the systems meant to serve students.<sup>178</sup>

### KEY TAKEAWAYS

- Guaranteed access to quality core instruction matters; consistent, uninterrupted access to core instruction, inclusive of exposure to grade-level text, tasks, and talk is a core equity issue for children learning to read and write.
- It is important to ensure coherence in high-quality instructional materials, strategies, language of instruction, and routines across the support continuum to create a connected literacy learning experience for students.
- The formative assessment process is the strongest tool to support and accelerate learning and growth.
- To design effective literacy instruction for all students, educators need skill and understanding in several key areas: how reading develops, how to align instruction to grade-level standards, how to identify where each student is on the learning progression, and how to effectively use differentiated practices and tiered instructional supports to move all students forward in their literacy learning.
- All instructional support for students with reading and writing difficulties should be provided in addition to high-quality core literacy instruction.
- It is important to ensure coherence in high-quality instructional materials, strategies, and routines across the support continuum to create a connected literacy learning experience for students.
- It is through assessing student learning on multiple occasions using multiple methods that a true picture of student strengths and their learning edges are revealed.
- At their best, formative assessment practices and literacy tests can help learners understand where they are in the learning process and identify their next moves in reading and writing.

### LEARN MORE

- [Formative Assessment Resources](#)
- [Limitations of Norm-Referenced Tests](#)
  - [Training Materials](#)
- [Culturally Sensitive, Relevant, Responsive, and Sustaining Assessment](#)
- [Anti-Racist Assessment Practices](#)

<sup>178</sup> Cole, 2008

# Section 8: Reaching All Learners

All students deserve to actively engage in literacy learning. This gives them the power to shape ideas through acts of reading, writing, speaking, and listening. In many ways this framework serves as a resource for the instructional core, or Tier 1, instruction. In this section, however, thoughtful adaptation for literacy instruction that meets the strengths and needs of all students is explored.

With appropriate support, careful planning, and adult mindsets that are asset-based, students can fully engage in the general education classroom during core literacy instruction. Successful adaptation may include: sheltering instruction, adapting materials, previewing learning, personalizing learning goals, peer tutoring, compacting curriculum, and co-teaching. Reaching all learners requires understanding and applying the ideas described in previous sections, while also adjusting and considering the unique strengths and needs of each student.

All students have the right to learn something new every day, whether they are in regular classrooms or in special education, language acquisition, or gifted programs. And every student will benefit from being pulled up to go beyond the curriculum at times.<sup>179</sup>

## Supporting Multilingual Learners

Every student, whether they communicate in one language or multiple languages, is a language learner. From this lens, the inherent commonality around language learning helps to ensure that students who are navigating the world through more than one language are affirmed in the additional cognitive and socio-linguistic lift they navigate daily. When children are honored as multilingual learners and provided opportunities to build from their linguistic assets, it contributes to literacy growth, motivation, and efficacy.



<sup>179</sup> [Tomlinson et al., 2003](#)

Oregon’s Early Literacy Framework is primarily written from the lens of developing literacy for multilingual learners within an English instructional model. While best practice for supporting multilingual learners’ literacy development is to build upon their linguistic repertoire through multilingual instructional programs such as dual language education, the majority of multilingual learners in Oregon currently learn to read in monolingual English settings. Wherever possible, best practices for multilingual learners participating in dual language education with biliteracy as the intended outcome is incorporated throughout the framework.

Multilingual learners deserve comprehensive literacy instruction alongside their monolingual peers, with the full guarantee of daily core instruction as an essential driver for literacy learning. The pervasive and misguided belief that multilingual learners must first demonstrate grade-level English proficiency before they can access grade-level work or text often results in multilingual learners being pulled out of core literacy instruction or assigned less rigorous tasks that reduce cognitive demand. This, in turn, creates less access to essential content and language-rich exposure, creating lasting impacts and long-term consequences for students’ self-efficacy and literacy proficiency.<sup>180</sup> The cumulative effect of limiting exposure to content and language-rich learning experiences for multilingual learners has deleterious and far-reaching effects. While additional explicit instruction might be needed for students to gain literacy proficiency, interventions or English Language Development support should not come at the expense of students’ access and exposure to quality, grade-level literacy learning. All students need opportunities to participate in challenging academic work that promotes deep disciplinary knowledge and encourages higher order thinking skills.<sup>181</sup>

## Multilingual Learners in Monolingual English Settings

The majority of multilingual learners in Oregon are developing literacy in English instructional programs, as opportunities for dual immersion, native language learning, and/or bilingual programming have yet to be realized statewide. For multilingual learners in an English-only instructional context, language and literacy development must happen throughout the instructional day with continued and sustained opportunities to practice language across domains.

Comprehensive literacy instruction, inclusive of the following essential practices, supports multilingual learners in a monolingual English setting to develop proficiency in reading, writing, speaking, and listening. The same components that accelerate and support language and literacy development for multilingual learners benefit all students’ language and content learning.<sup>182</sup> Simply put, instructional practices that support multilingual learners also support monolingual English speakers. These include but are not limited to:<sup>183</sup>

- Developing literacy within a comprehensive approach that includes language development, teaching foundational skills in context, and the integration of meaning-making across content areas.
- Strengthening oral language development through explicit connections to reading and writing instruction.
- Placing emphasis on comprehension as the primary goal of reading.
- Attending to the close relationship between reading, writing, listening, and speaking.
- Building upon and affirming students’ home language and cultural practices.
- Providing sheltered instruction to build on students’ background knowledge while leveraging comprehensible input as a core instructional strategy.

180 García & Kleifgen, 2018

181 García & Kleifgen, 2018

182 [Escamilla et al., 2022](#)

183 From [Escamilla et al., 2022](#)

- Recognizing that sociocultural factors play a major role in students' learning and promoting an asset-oriented school and classroom climate is essential to supporting literacy development.
- Encouraging families to continue literacy development in their home language through read-alouds and oral conversations.<sup>184</sup>

Building strong foundational reading skills in language comprehension and word recognition is important, but insufficient, for multilingual students' overall reading and literacy development.<sup>185</sup> Therefore, when designing literacy instruction to support multilingual learners, students' literacy skills and language development need to be supported. To more successfully facilitate English literacy acquisition for multilingual learners, effective literacy instruction emphasizes explicit teaching of both oracy and literacy.<sup>186</sup> Intentionally designing English literacy instruction to support multilingual learners includes a focus on linguistic transfer, including cognates; explicit instruction about phonemes that are not present within a student's home language; and incorporating students' home language(s) when possible through paired readings.<sup>187</sup>

Lastly, while multilingual learners in monolingual settings benefit from foundational skills that are taught and reinforced in the context of the core literacy block, it is not appropriate for foundational skill practice to comprise the entirety of English language development. Multilingual students benefit most from cognitively demanding context-embedded English language development instruction designed to develop vocabulary, scaffold discourse, build and reinforce reading and writing skills, and hone oral language skills.<sup>188</sup> English language development instruction should be intentionally aligned to English Language Proficiency standards<sup>189</sup> while taking into account each student's English language proficiency in order to design learning experiences that are within their zone of proximal development.

## Multilingual Learners In Bilingual/Dual Immersion Settings

To recognize and build from the assets of multilingualism, understanding multilingual learners' lived experiences, how they learn, and how they acquire English is essential.<sup>190</sup> Literacy development for students with two or more languages is distinctly different from the literacy development of monolingual students. "The degree to which the dual language brain is leveraged or ignored spells a major difference between effective and ineffective/exclusionary literacy instruction for dual language learners."<sup>191</sup>

Multilingual learners who participate in dual language programs simultaneously develop literacy skills in their home language and in English. Dual language education promotes the explicit goal of biliteracy by developing foundational skills in the multilingual learner's home language, strategically aligning literacy instruction across two languages, and encouraging cross-linguaging, transfer, and metalinguistic skills. Importantly, dual language classrooms incorporate assessments in two languages, building from the strengths of the home language to develop fluency in the second language.<sup>192</sup>

184 García & Kleifgen, 2018

185 [Escamilla et al., 2022](#)

186 Hoover et al., 2016

187 Cárdenas-Hagan, 2020

188 Cummins, 1984

189 Council of Chief State School Officers, 2014

190 [Herrera et al., 2022](#)

191 [Escamilla et al., 2022](#)

192 Abdelkader et al., 2022

Essential practices that promote biliteracy within dual language instruction include:

- Developing home language and literacy alongside English language and literacy.<sup>193</sup>
- Integrating oral language and literacy instruction into content-area teaching<sup>194</sup> in both home language(s) and English.
- Teaching academic vocabulary intentionally using a variety of instructional activities.<sup>195</sup>
- Providing regular, structured opportunities to develop written language skills, alongside small-group instruction in areas of literacy and English language development.<sup>196</sup>
- Leveraging cross-language connections that promote transfer and engage students in translanguaging.<sup>197</sup>
- Implementing assessment practices such as screeners, and formative and summative assessments in the student’s home language and English.
- Encouraging families to continue literacy development in their home language through read-alouds and oral conversations.<sup>198</sup>

It is widely understood that students’ English proficiency will take longer to reach in a dual immersion context than that of monolingual peers.<sup>199</sup> Assessment practices for multilingual learners supported in dual immersion settings must account for the 5–7 year timeline for multilingual learners to achieve parity with English speakers in terms of English literacy acquisition.<sup>200</sup> For this reason, it is essential that students are provided multiple ways to demonstrate literacy proficiency, that progress in their home language is assessed and affirmed, and that students are not erroneously identified for special education simply because of latent English development.<sup>201</sup>

While additional time, skills practice, oral language development, and explicit instruction may be necessary for students not yet reading in English at grade level, the student’s access to quality, grade-level literacy learning should not be limited or replaced by remedial efforts.<sup>202</sup>

“In general, education practitioners have had difficulty distinguishing between sociocultural/ sociolinguistic factors (including language development) and disabilities, which has prompted calls for specific training in this area.”

Herrera et al., 2022

193 August & Shanahan, 2006; Riches & Genesee, 2006

194 [Baker et al., 2014](#)

195 [Baker et al., 2014](#)

196 [Baker et al., 2014](#)

197 [García, 2009a](#)

198 García & Kleifgen, 2018

199 Lindholm-Leary & Howard, 2008

200 Lindholm-Leary & Howard, 2008

201 Lindholm-Leary & Howard, 2008

202 Kieffer, 2020; Kieffer & Thompson, 2018

While the literacy learning arc for students learning in multiple languages can be longer than students learning in monolingual instructional programs, the benefits are far-reaching. Impressively, the bilingual brain is stronger, more pliable, and demonstrates higher levels of synthesis and sense-making across content areas.<sup>203</sup> Moreover, research supports that students in dual immersion settings gain additional social, cognitive, and familial benefits associated with becoming fully biliterate.<sup>204</sup> Over time, multilingual learners participating in high-quality dual language programs perform at or above English-speaking students in English-only classrooms.<sup>205</sup> The benefits of biliteracy are compelling—dual immersion instruction is a significant lever for increased literacy outcomes in Oregon.

#### KEY TAKEAWAYS FOR MULTILINGUAL LEARNERS

- All students are language learners. Multilingual learners simply require an intentionality in language instruction that is ultimately of benefit to all students in the classroom.
- Multilingual learners deserve affirmation and intentional linkage between known language and new skills.
- All students have a right to core literacy instruction. Any needed language interventions must be offered outside core literacy instruction blocks.
- Multilingual learners desire and deserve challenging content and context embedded language development alongside any needed foundational language skills.
- Literacy development for those with two languages is different from the monolingual speaker. Maximizing learning requires knowledge of each student’s language context.
- English proficiency may take longer to reach than that of monolingual peers. Assessment must be informed and nuanced to account for the possibility of language development range.
- Multilingual learners benefit from classroom settings where oral language use is emphasized, and student-to-student interaction is promoted.
- The benefits of multilingual language learning are varied and research supported.

#### LEARN MORE FOR MULTILINGUAL LEARNERS

- [Bilingual Site for Educators and Families](#)
- [Translanguaging to Support Students’ Bilingual and Multilingual Development](#)
- [Literacy for Multilingual Learners](#)
- [Supporting Early Literacy for Multilingual Learners](#)
- [Multilingual Learning Toolkit](#)
- [The Science of Reading Progresses: Communicating Advances Beyond the Simple View of Reading](#)
- [How Does the Science of Reading Apply to Teaching Multilingual Learners?](#)

203 Lindholm-Leary & Howard, 2008

204 [Baca, 2018](#)

205 Hamayan et al., 2013

# Supporting Students with Reading Difficulties, Reading Disabilities, & Dyslexia

Supporting students experiencing reading difficulties, such as dyslexia, is crucial to ensuring every child has the opportunity to thrive academically and personally. Dyslexia affects a portion of the population and can pose unique challenges for both students and educators. With comprehensive, evidence-based support, students with reading difficulties, including dyslexia, can achieve at the highest levels. Oregon has established a strong framework for early identification and prevention of reading difficulties through its dyslexia policies. Oregon dyslexia policies (OAR 581-022-2440<sup>206</sup> and OAR 581-002-1805<sup>207</sup>) require both teacher training<sup>208</sup> and universal screening<sup>209</sup> as part of a comprehensive model of assessment and support for all students.

Select resources from ODE related to dyslexia and students experiencing disability: [Dyslexia Website](#), [Guidance on Screening and Instructional Support](#), and [Specially Designed Instruction and Least Restrictive Environment Considerations for IEP teams](#).

Oregon law requires universal screening for risk factors of reading difficulties, including dyslexia, beginning in kindergarten, although individual student circumstances could require earlier assessment of a child's strengths and needs. Identification of students with characteristics of dyslexia is a process that incorporates multiple steps and sources of information. Once universal screening results are analyzed, then students are provided with instructional support, progress monitoring, and additional assessment to guide more intensive instructional interventions. The success of this model depends upon the provision of explicit, systematic, evidence-based instruction provided by qualified educators across all tiers of support.

- **Step 1: Complete universal screening.** The role of universal screening in primary grades to identify students who are in need of reading instructional support has been widely studied. The old saying, "Just wait and they will catch up," does not hold up to all the empirical data and support for providing early intervention for struggling readers. Whenever possible, students should also be assessed in their native language, especially if they have had some formal native language instruction. Districts should gather additional information about the student's literacy background including exposure to English and the structure of the native language and use this information to help interpret screening results and to inform instruction.
- **Step 2: Provide instructional support for students who demonstrate the need for additional support and monitor their progress.** Schools should begin intervening early to address skill areas as indicated by the universal screening measures. Students should start receiving interventions of sufficient intensity based on student need as soon as possible. For many students, early intervention can be provided within the context of the core reading program through differentiated and small-group instruction. Other students may require additional instructional support beyond the core reading as described above. Student progress and growth should be closely monitored to see if the targeted intervention is effective for the student. This type of progress monitoring is targeted and specific for an individual student, and is more individualized than more general class progress monitoring described in [Section 7: Core Instruction & Assessment](#).

206 [Teacher Training Related to Dyslexia, 2018](#)

207 [Annual List of Dyslexia-Related Training Opportunities, 2018](#)

208 [ODE, 2018a](#)

209 [ODE, 2022a](#)

- **Step 3: Administer informal diagnostic measures and connect with families to learn more about family history relative to difficulty learning to read or write for students who do not make adequate progress.** Administering informal diagnostic assessments that identify a student's specific areas of strength and need will provide educators with information that is needed to further inform instruction. Informal diagnostic assessment consists of completing a more in-depth skills development inventory on a narrow skill area. In addition to gathering informal diagnostic data, school teams should screen for a family history of difficulty in learning to read if a student demonstrates risk factors for reading difficulties, including dyslexia. Because dyslexia is neurobiological in origin and often runs in families, this family screening may provide important information related to the potential source of a student's reading struggle. To support family engagement and therefore children's learning, educators and schools should center these important conversations within culturally responsive and supportive partnerships.
- **Step 4: Intensify instructional support as needed based on student-level assessment data and continue monitoring progress.** Using the data collected from the informal diagnostic assessments, school teams should provide more intensive instructional support to those students who do not make adequate progress despite the provision of evidence-based support in addition to core instruction. Instructional support and intervention may be intensified by factors such as: providing more time, reducing group size, increasing engagement strategies, and addressing a broader range of skills.
- **Step 5: Begin Individualized Problem Solving/Data-Based Individualization to adapt the intervention as needed and continue progress monitoring for students who do not make adequate progress.** This data-informed approach involves collecting detailed information about the curriculum, instruction, environment, and learner characteristics to develop a comprehensive plan of support. In this phase of support, teams continue to collect diagnostic data and implement validated interventions but use adaptation strategies to further individualize the support. If student-level data indicate that additional accommodations or specialized instruction beyond tiered instructional supports may be required, school staff may refer a student for a 504 plan or special education evaluation.

Although it reflects another state context, [Michigan Dyslexia Handbook: A Guide to Accelerating Learner Outcomes in Literacy](#) includes many helpful resources:

- An explanation of dyslexia.
- A graphic showing the myths vs. facts about dyslexia.
- Best practices to prevent reading difficulties associated with the primary consequences of dyslexia.
- Information about the assessment practices needed to inform instruction and intervention methods for learners with dyslexia characteristics.

## Special Education Eligibility Processes

Culturally responsive teaching and problem-solving are essential elements of inclusive and equitable learning environments that can support appropriate special education eligibility processes. The following recommendations aim to reduce disproportionality in special education eligibility due to racial and linguistic bias while still ensuring that all students receive the support they need. Through the use of culturally responsive and comprehensive, coherent systems of instruction and assessment, school teams can more accurately identify students who are experiencing a specific learning disability.

Students may need more support than general education provides in order to achieve grade-level literacy expectations. By employing fair and sensitive approaches to problem-solving that respect and incorporate the diverse cultural backgrounds of all students, educational teams can accurately discern between students who have a specific learning disability and those who have not yet demonstrated grade-level skills because they have not been given appropriate instruction.

For example, sometimes a student may not make expected progress or may not respond to interventions as measured by progress monitoring data. In this scenario, staff should continue providing core instruction and targeted interventions while also initiating a problem-solving process.<sup>210</sup> This process leads teams to develop a more intensive, data-based and individualized instructional support plan based on student strengths and areas of need. Implementing this support plan may lead to improvement in student performance and may prevent inappropriate referrals to special education. However, it is important to note that this process cannot delay a timely initial special education evaluation for children suspected of having a disability. If the need for a special education referral arises, the information gathered from the problem-solving process can inform the special education evaluation and eligibility process.

#### GUIDING QUESTIONS TO INTERRUPT BIAS WHEN CONSIDERING THE NEED FOR INITIAL EVALUATION FOR SPECIAL EDUCATION:<sup>211</sup>

How is the education team...

- considering perspectives other than the initial presentation of the student concern? (*Presenting Initial Concern*)
- operationalizing an area of need that is focused on instruction, classroom management, student skills, and/or teacher skills? (*Identifying the Area of Need*)
- identifying a low-inference, alterable, and measurable hypothesis that explains why the problem is occurring? (*Identifying a Hypothesis for Area of Need*)
- using strategies to mitigate implicit bias, including in the collection of data? (*Collecting Data*)
- considering all the data and identifying common themes to verify the problem and confirm the hypothesis? (*Interpreting Data*)
- selecting an evidence-based intervention based on what the data reflects? (*Selecting Evidence-Based Interventions*)
- using strategies to improve the cultural responsiveness of the intervention during selection and progress monitoring? (*Improving Cultural Responsiveness of Intervention*)

## Supporting Students Experiencing Disabilities Through Special Education

Most students, including those experiencing disabilities, benefit from deep learning in the general education classroom with appropriate supports such as accommodations, adapted materials, individualized goals or objectives, and co-teaching. In some cases, students need more direct, explicit, and targeted literacy interventions. The Individuals with Disabilities Education Act (IDEA) mandates that students who experience disabilities have a free appropriate public education, often referred to as FAPE, that is individualized to meet their respective needs. As with all students, those who experience disabilities benefit most from inclusive, student-centered, and intentional instruction. When it is determined that students are eligible for special education services, they must have an Individualized Education Program (IEP), designed by an appropriate team, that enables access to a free appropriate public education in the least restrictive environment.

<sup>210</sup> [The IRIS Center, 2022](#)

<sup>211</sup> [Newell, 2017](#)

For students with specific reading and writing difficulties, the IEP provides an opportunity to work collaboratively to set goals for literacy and identify teaching and learning supports. A student experiencing a specific learning disability, such as dyslexia, may be eligible for an IEP if it is determined that special education is required. Additionally, not all disabilities impact literacy in the same way. Although reading disabilities (e.g., dyslexia) are the most common specific learning disability, there are a variety of other disabilities that can impact students' literacy trajectories.

### Specially Designed Instruction and Related Services<sup>212</sup>

Students experiencing disabilities are general education students first and, unless another arrangement is required by their Individualized Education Program, they need access to whole group core instruction. In addition to general education support, Specially Designed Instruction and related services must be provided as mandated in each eligible student's IEP. In the context of literacy, related services may include speech-language therapy, occupational therapy, or physical therapy. Special education is intended to make high-quality core instruction accessible and enable students to meet their annual IEP goals.

IEP teams should take a broad view of instruction and carefully consider the special education required to enable the provision of free appropriate public education and access to the general curriculum for each eligible child. Special educators should adjust the content, methodology, or delivery of core instruction based on a student's IEP. Specially Designed Instruction should enhance and build upon general education curriculum and instruction.

### Accessibility in the Early Literacy Classroom<sup>213</sup>

One way to increase access and remove barriers for students experiencing disabilities is through the use of accessible materials, formats, and technologies. Universally designed classrooms should include multiple means of access to materials for all students, not just those students with specific accommodations listed on IEPs. The National Center on Accessible Educational Materials offers four categories to describe accessibility.

- **Accessible educational materials** are print- and technology-based educational materials, including printed and electronic textbooks and related core materials that are designed or enhanced in a way that makes them usable across the widest range of learner variability, regardless of format (e.g., print, digital, graphic, audio, video). Accessible educational materials make literacy core instructional materials accessible to all learners.
- **Accessible formats<sup>214</sup>** provide the same information in another form to address the barriers text-based materials can present for some learners. Examples of accessible formats include audio, braille, large print, tactile graphics, and digital text conforming to accessibility standards.
- **Accessible technologies** are the hardware devices and software that provide learners access to the content in accessible digital materials. These technologies are designed to be flexible and provide the support that benefits everyone – they are universally designed.
- **Assistive technologies** are technological systems and services that assist a student who experiences a disability to access their environment, resources, or materials. Some examples of assistive technology in the literacy learning environment include text-to-speech, speech recognition, and screen readers.

<sup>212</sup> [ODE, n.d-f](#)

<sup>213</sup> [AEM Center, n.d.](#)

<sup>214</sup> [CAST, 2021](#)

### KEY TAKEAWAYS FOR SUPPORTING STUDENTS WITH READING DIFFICULTIES, READING DISABILITIES AND DYSLEXIA

- The aims of literacy instruction apply to all children; with modifications, accommodations, supports, and technologies, every child must have access to literacy learning.
- Early screening matters. Districts must universally screen for risk factors indicative of reading difficulties, including dyslexia, in kindergarten.
- Prevention of early reading difficulties must include increasingly intensified and individualized instructional support matched to students' areas of strength and need.
- To the maximum extent appropriate, all instructional support for students with reading and writing difficulties should be provided *in addition to* high-quality core literacy instruction.
- Instructional supports must be informed by multiple data sources and matched to areas of strength and need.
- Identifying where each student is on the learning progression supports effective use of differentiated practices and tiered instructional supports.
- Ensuring accessibility through alternative formats and technology is an important way to enhance access.
- Through the use of culturally responsive and comprehensive, coherent systems of instruction and assessment, school teams can more accurately identify students who are experiencing a specific learning disability.

### LEARN MORE FOR SUPPORTING STUDENTS WITH READING DIFFICULTIES, READING DISABILITIES AND DYSLEXIA

- [MTSS for Reading Component Module Series](#)
- [The Universal Design for Learning Guidelines](#)
- [Literacy in the Inclusive Classroom](#)
- [Intensifying Literacy Instruction – Essential Practices](#)
- [High Leverage Practices in Special Education](#)
- [Data-Based Individualization: A Framework for Intensive Intervention](#)
- [The Pre-Referral Process: Procedures for Supporting Students with Academic and Behavioral Concerns](#)
- [Intensive Intervention \(Part 1\): Using Data-Based Individualization To Intensify Instruction](#)
- [Intensive Intervention \(Part 2\): Collecting and Analyzing Data for Data-Based Individualization](#)
- [Considerations When Planning Literacy Instruction for Students with Intellectual Disabilities](#)

# Talented & Gifted Students

Gifted readers often develop reading skills easily and become proficient readers at an early age. It is not unusual for gifted readers to process text quickly, comprehend above-grade level text, and sustain reading for an extended period of time. Gifted readers may be highly verbal and use advanced language and vocabulary in any language with ease. They may also excel in creative writing, literary analysis, oral communication, linguistic and vocabulary development, and multilingual learning.

Early informal and formal classroom assessment may reveal students who already meet or exceed grade-level expectations for reading, writing, and other literacy skills. A child who is beyond grade-level proficiency in the area of reading or writing may or may not be officially identified as Talented and Gifted, yet deserves learning opportunities that foster their academic growth and provide appropriate rigor. Contrary to commonly held beliefs that talented and gifted students may be fine without additional instructional support, “gifted students have special needs; they are at risk of learning the least in the classroom.”<sup>215</sup>

While there are several areas of giftedness identification, students who are gifted in reading and language share some common characteristics:<sup>216</sup>

- Reading early and at an advanced level.
- Using metacognitive processes (thinking about thinking) in reading.
- Reading with enthusiasm for topics of interest.
- Demonstrating advanced language skills in any language and in any domain (i.e., oral, reading, and writing).

Multilingual learners are underrepresented in Talented and Gifted programs for many problematic reasons, including assessments contingent on proficiency in English and educator bias. Using native language ability and achievement assessments as indicators of potential giftedness, in addition to family interviews, are important pathways for Talented and Gifted identification of multilingual learners. Perhaps even more importantly, educators must develop new ways of seeing multilingual children as gifted, bringing an asset-based perspective that honors the incredible strength of the multilingual brain.

Giftedness can have varying meanings across cultures. Some researchers have re-defined giftedness among English language learners. Gifted English learners can display a wide range of skills, for example, the ability to:

- Acquire a second language at an accelerated rate
- Respect and appreciate languages and cultures that differ from their own
- Perform well in mathematics
- Switch between English and their native language with ease, sometimes referred to as code-switching
- Interpret the English language
- Grasp and use American idioms and expressions
- Adapt behaviors so that they are culturally relevant and appropriate

REL Northwest<sup>217</sup>

215 Choice & Walker, 2011

216 [Reis, 2012](#)

217 [Regional Educational Laboratory Northwest, n.d.](#)

**Table 6. Supporting Gifted and Talented Readers**

Instead of This:	Do This:
Treating all gifted readers as a homogenous group who all love to read...	Acknowledge that gifted and talented readers are a diverse group with varied intellectual, emotional, cultural, and linguistic differences. Some may be reluctant readers, despite their giftedness.
Assuming gifted and talented readers are experts at text comprehension, and do not need specific reading instruction...	Provide instructional strategies for developing deeper insights into the subtleties of literary selections, understanding nuances of meaning, and mastering advanced-level informational content. Even though most gifted and talented readers have highly developed comprehension skills, especially in comparison to peers of their age, they still benefit from specific reading strategies.
Allowing gifted readers to be entirely autonomous in their learning and self-selecting all of their reading materials...	Encourage students to broaden their repertoire of reading material to ensure access to complex content, vocabulary, genre and text structure. While choice in reading materials is one of the essential components of a reading program for gifted and talented readers, it should be balanced with teacher-assigned reading
Providing talented readers with the same instruction...	Differentiate according to advanced readers' strengths and needs.

While many of the strategies listed below are appropriate for all students, they are especially effective for supporting literacy growth for Talented and Gifted students:<sup>218</sup>

- Utilize assessment practices to determine curriculum compacting.<sup>219</sup>
- Provide access to challenging reading materials that include both depth and complexity.
- Deepen reading comprehension skills using a framework such as Webb's depth of knowledge to increase the complexity of thinking.<sup>220</sup>
- Model and expand students' metacognitive processes (thinking about thinking) while they are actively reading text.
- Develop critical thinking and analysis skills through reading and comparing a variety of genres and modes and encouraging writing in response to reading.
- Include representation of students' identity by offering diverse, multicultural literature across multiple genres.
- Intentionally provide opportunities for group discussion of selected texts, using readiness grouping or precision pairing designed to drive and elevate student discourse and growth.
- Foster student agency by providing opportunities for students to choose texts based on genre preference or advanced study on topics of interest.
- Encourage creative reading behaviors, including writing and dramatic interpretation.

218 [Wood, 2008](#)

219 [National Association for Gifted Children, 2014](#)

220 [Webb, 1997; Webb, 2002](#)

To meet the strengths and needs of gifted learners, differentiated instruction should account for their current proficiency level, depth of knowledge, critical and creative thinking skills, and accelerated rates of learning. Not all literacy-gifted students are the same; each student needs appropriately designed instructional strategies that reflect their learning profile.<sup>221</sup> Differentiation is critical for all students, and especially for students who are considered twice-exceptional, also referred to as “2E.” Students who are twice-exceptional are gifted, and may also experience a special need or disability. When planning for literacy instruction for twice-exceptional students, coordination between general education staff, special education specialists, and the Talented and Gifted coordinator is critical to ensure that children who are twice-exceptional are provided appropriate targeted support.<sup>222</sup>

#### KEY TAKEAWAYS FOR TALENTED AND GIFTED

- Multilingual learners are disproportionately underrepresented in Talented and Gifted programs. It is important, therefore, for educators to be responsive to ways that multilingual learners demonstrate giftedness.
- Students may enter the classroom meeting and exceeding grade-level benchmarks; they deserve access to strategic instructional practices that provide appropriate academic challenges and opportunities to foster academic growth.
- Differentiating instruction, including depth of knowledge, critical and creative thinking skills, and accelerated rates of learning is critical to sustain engagement for gifted readers.
- Ultimately, giftedness is more than a reading level or an enrichment activity. When teachers look at a gifted student's needs, they need to assess the whole student, and be aware of students who may be twice-exceptional.

#### LEARN MORE FOR TALENTED AND GIFTED

- [Improving the Identification of English Learner Students for Talented and Gifted Programs](#)
- [Advanced Learner Multi-Tiered System of Support Guide](#)
- [National Association for Gifted Children: A Position Statement](#)
- [Gifted and Dyslexic: Identifying and Instructing the Twice Exceptional Student](#)
- [Booklists for Talented Readers](#)
- [Talented and Gifted Education \(from ODE\)](#)
- [Tips for Identifying Gifted English Learner Students](#)

221 [Wood, 2008](#)

222 [National Association for Gifted Children, 2015](#)

# Appendix A: Acknowledgments

Thank you, first and foremost, to every Oregon student, our most important focus. As you strive forward in writing, reading, speaking, listening, and thinking deeply, you inspire those around you. The world wants to hear your voice, which is why Oregon cares about your literacy achievement.

Thank you to families and caregivers; as your child's first teacher you are seeding language and literacy through song, story, and the languages of your home.

Thank you to every educator and literacy leader making literacy come alive for Oregon children, taking ideas from paper into practice. You are doing powerful and important work; we see you and honor you.

Thank you to everyone who read the Preview Draft version of Oregon's Early Literacy Framework and provided feedback and suggestions. Additionally, thank you to all 152 participants who participated in more than 21 focus groups to provide feedback on the framework. Your input made the final version of the framework stronger and better.

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Thank you to the Literacy Leadership State Steering Committee that worked in 2009 to publish Oregon's K-12 Literacy framework along with the Center on Teaching and Learning in the College of Education at the University of Oregon. The 2009 Literacy Framework has been a foundational resource and has informed key parts of ODE's most recent effort.

Thank you to each state who came before in updating their state-wide literacy framework, and thank you, especially, to those who generously provided permission for us to build upon their work. Our gratitude to the Michigan Department of Education, the Massachusetts Department of Elementary and Secondary Education, and the Tennessee Department of Education.

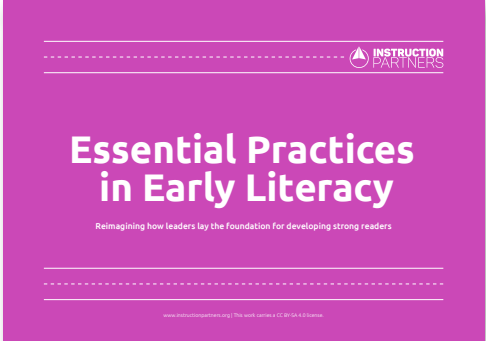
We are also grateful for and credit the work done by the National Committee for Effective Literacy and their generosity in terms of time and content. Likewise, we are thankful to the Instruction Partners for creating such a thoughtful playbook for implementing early literacy practices and for openly licensing it.

Thank you to the many reviewers who shared their professional expertise to inform this document as professors, practitioners, scholars, and literacy coaches. We are especially grateful to Dr. Anita Archer, Dr. Rachel Bhansari, Dr. Julie Esparza Brown, Dr. Ronda Fritz, Dr. Claude Goldenberg, Dr. Amanda Kibler, Dr. Dot McElhone, and Dr. Audrey Lucero for reviewing and providing feedback and enhancing the quality and validity of this resource.

Thank you to Governor Kotek for her call to action around literacy learning in Oregon, recognizing that when students develop essential early literacy skills it makes all other learning possible. With a focus on centering families as children's first teachers, ensuring classrooms are culturally responsive, and highlighting the importance of supporting educators in on-going professional learning, Governor Kotek is clear that Oregon must commit to early literacy success. Her advocacy for literacy and endorsement of this framework is foundational to realizing real change for young readers and writers in Oregon.

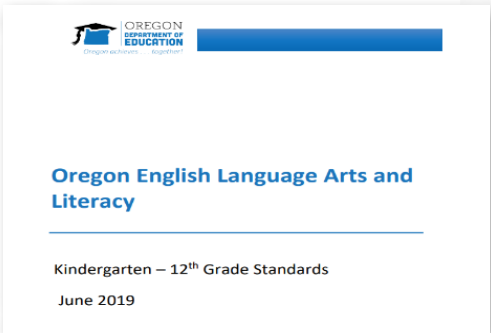
# Appendix B: Companion Guidance Documents & Resources

## Document

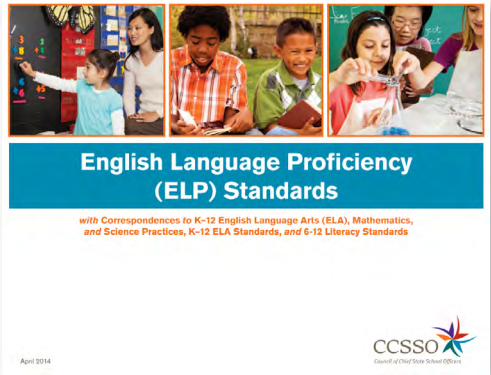


## Description

Instruction Partner’s [Early Literacy Implementation Playbook](#) provides ready-to-use, step-by-step guidance. Early literacy leaders and educators can use this playbook to strengthen and monitor literacy development in their school or system, whether building the essential implementation practices from scratch or tuning up what they already have in place.



[English Language Arts and Literacy Standards](#): Oregon’s most recent English Language Arts and Literacy standards were adopted in 2019. These standards are grounded in research and align with the science of reading. They set the expectations for classroom teaching outcomes.



[English Language Proficiency Standards](#): The State Board of Education approved the latest English Language Proficiency standards in October 2013. The English Language Proficiency Standards highlight and amplify the critical language, knowledge about language, and skills using language that are necessary for multilingual learners to be successful in schools.



# Appendix C: Glossary

For alignment, we have defined the following terms as they are used within the Oregon Early Literacy Framework.

- **ALPHABETIC PRINCIPLE:** sounds in speech (phonology) relate intentionally and conventionally to the letters of the English alphabetic writing system (i.e., orthography). English has a deep orthography where levels of phonology and awareness of meaningful units (morphology) are critical to learning to read. Levels of phonology are the word, syllable, onset-rime (medial vowel and final consonant as in *-at* in *cat*), and phoneme. Phonemes are the minimal unit of meaningful sound (e.g., the medial vowels in *pin* and *pen* are distinct phonemes denoting different words in most dialects of English but not in all dialects). Morphemes are the minimal units of meaning: prefixes, suffixes (inflectional or derivational), roots (*flex* in *flexible*), and base words (which can stand alone without other morphemes). The morphophonemic nature of English becomes apparent when noticing that *signal* consists of the base word *sign* plus the suffix *-al* (Foorman, 2023).
- **ASSESSMENT:** the wide variety of methods or tools that educators use to evaluate, measure, and document the academic readiness, learning progress, skill acquisition, or educational needs of students.<sup>223</sup>
- **TEXT COMPLEXITY:** the level of difficulty in reading and understanding a text based on a series of factors: the readability of the text, the levels of meaning or purpose in the text, the structure of the text, the conventionality and clarity of the language, and the knowledge demands of the text.<sup>224</sup> Complex texts are texts that provide an appropriate level of rigor aligned with grade-level expectations.
- **COGNATE:** words in two languages that share a similar meaning, spelling, and pronunciation.<sup>225</sup>
- **CORE INSTRUCTION:** high-quality instruction in the general education setting that is aligned to grade-level standards, centered around grade-level-aligned materials, and inclusive of every student in the classroom, regardless of performance level.<sup>226</sup> Sometimes also referred to as Tier I Instruction, this is the primary prevention for reading and writing difficulty. It maximizes learning by providing access to peer learning models, the classroom teacher, and grade-level aligned texts and tasks.
- **COMPREHENSION:** intentional thinking about and understanding of the content of a text (comprehension is a summative skill that is supported by a student's aptitude in the other four pillars). One of the Five Pillars of Reading.<sup>227</sup>
- **CULTURALLY RELEVANT PEDAGOGY:** helps students to accept and affirm their cultural identity while developing critical perspectives that challenge inequities that schools (and other institutions) perpetuate.<sup>228</sup>
- **CULTURALLY RESPONSIVE:** the implicit recognition and incorporation of the cultural knowledge, experience, and ways of being and knowing of students in teaching, learning, and assessment. This includes identifying, valuing, and maintaining a high commitment to: students' cultural assets in instruction and assessment; diverse frames of reference that correspond to multifaceted cultural perspectives/experiences; and behaviors in the classroom that can differ from White-centered cultural views of what qualifies as achievement or success.<sup>229</sup>

223 [Great Schools Partnership, 2015](#)

224 [Louisiana Department of Education, 2014](#)

225 [Colorín Colorado, 2007](#)

226 [Bowen, 2021](#)

227 [National Reading Panel, n.d.](#)

228 Ladson-Billings, 1995

229 [ODE, n.d.-a](#)

- **CULTURALLY SUSTAINING PEDAGOGIES:** “[seeks] to perpetuate and foster—to sustain—linguistic, literate, and cultural pluralism as part of schooling for social transformation.”<sup>230</sup>
- **DECODING:** Translating a word from print to speech by using knowledge of phoneme-grapheme, or sound-symbol correspondences.
- **DIAGNOSTIC TEACHING:** teaching that individualizes instruction based on information collected from the continuous assessment that includes a combination of informal diagnostic assessments and lesson observation.<sup>231</sup>
- **DYSLEXIA:** a specific learning disability that is neurobiological in origin. It is characterized by difficulties with accurate or fluent word recognition, or both, and by poor spelling and decoding abilities. These difficulties typically result from a deficit in the phonological component of language that is often unexpected in relation to other cognitive abilities and the provision of effective classroom instruction. Secondary consequences may include problems in reading comprehension and reduced reading experience that can impede the growth of vocabulary and background knowledge.<sup>232</sup>
- **EARLY LITERACY:** refers to the skills outlined by Oregon’s English Language Arts Standards for grades K–5 inclusive of reading foundational skills (e.g., print concepts; phonological awareness; phonics and word recognition; fluency); comprehension; language and vocabulary; writing; speaking and listening. These standards are reflective of the literacy skills and knowledge that begin developing prior to students’ entry into kindergarten and which will continue to develop over time and lay a foundation for further and more advanced literacy development in later grades.
- **ENCODING:** translating speech into print (writing) using knowledge of phoneme-grapheme, or sound-symbol correspondences.
- **ENGLISH LEARNER:** Oregon House Bill 3499, passed in 2015, defines English Learner as a student who has limited English language proficiency because English is not the native language of the student or the student comes from an environment where a language other than English has had a significant impact on the student’s level of English language proficiency.<sup>233</sup> More recently, the term Multilingual Learners is sometimes preferred, as it decenters English and is more inclusive of all students who speak two or more languages.
- **EVIDENCE-BASED LITERACY PRACTICES:** refers to instructional practices with a proven record of success based on reliable, trustworthy, and valid evidence that when the instructional practices are implemented with fidelity, students can be expected to make adequate gains in literacy achievement.<sup>234 235</sup>
- **EXECUTIVE FUNCTION SKILLS:** higher-order self-regulatory neurocognitive processes used for complex tasks. These skills include cognitive flexibility, working memory, inhibitory control, attention, and planning.<sup>236</sup>
- **EXPLICIT INSTRUCTION:** direct, face-to-face teaching that involves teacher explanation, demonstration, and the provision of ongoing corrective feedback.<sup>237</sup>
- **EXPLICIT, SYSTEMATIC INSTRUCTION:** code-based foundational reading instruction that moves early readers and writers along a continuum of skills in the areas of print concepts, phonological awareness, phonics and word recognition, and fluency, which are key areas represented in the [Oregon English Language Arts and Literacy Reading Foundational Skills Standards](#) for students in grades K–5.<sup>238</sup>

230 Paris & Alim, 2017

231 [ODE, 2018c](#)

232 [Dyslexia-Related Training: Definitions, 2018](#)

233 [HB 3499, 2015](#)

234 [Dyslexia-Related Training: Definitions, 2018](#)

235 ODE defines evidence-based in a range of ways given the complex bodies of work across the K-12 system.

236 Dawson & Guare, 2018; Diamond, 2012; Duke & Cartwright, 2021; Johann & Karbach, 2019

237 [Dyslexia-Related Training: Definitions, 2018](#); [ODE, 2018c](#)

238 [Dyslexia-Related Training: Definitions, 2018](#)

- **FLUENCY:** reading text accurately and with sufficient pace, so that deep comprehension is possible. One of the Five Pillars of Reading.<sup>239</sup>
- **FOCAL GROUP:** aligned with [Student Success Act](#): “students of color; students experiencing disabilities; emerging bilingual students; and students navigating poverty, homelessness, and foster care; and other students who have historically experienced disparities in our schools.”<sup>240</sup>
- **FOUNDATIONAL SKILLS:** print concepts, phonological awareness, phonics and word recognition, and fluency. For a deeper dive around Foundational Skills Key Concepts and Terms, reference Achieve the Core’s: [Reading Foundational Skills Key Concepts and Terms](#).
- **FUNDS OF KNOWLEDGE:** bodies of information developed within historical and cultural contexts that provide individuals and households the knowledge they need to maintain their well-being.<sup>241</sup>
- **GRAPHEME:** the smallest unit of sound within our language system. A phoneme combines with other phonemes to make words.<sup>242</sup>
- **PHONEME–GRAPHEME CORRESPONDENCE:** matching of a spoken sound (phoneme) to its corresponding letter or group of letters (grapheme).<sup>243</sup>
- **HIGH-QUALITY INSTRUCTIONAL MATERIALS:** instructional materials that include specific learning goals and lessons aligned to content standards, student-centered approaches to inquiry-based learning, research-based teaching strategies, teacher support materials, and embedded formative assessments to effectively help teachers implement instructional units and courses that are integrated, coherent, and sequenced.<sup>244</sup>
- **INCLUSIVE TEACHING:** any number of teaching approaches that address the needs of students with a variety of backgrounds, learning modalities, and abilities. These strategies contribute to an overall inclusive learning environment in which all students perceive to be valued and able to succeed.<sup>245</sup>
- **LINGUISTICALLY RESPONSIVE INSTRUCTION:** teaching practices that support the learning, development, and engagement of children from diverse linguistic backgrounds. It includes support for continued development of children’s home or tribal languages by authentically incorporating children’s languages into the learning environment.<sup>246</sup>
- **LITERACY:** identifying, understanding, interpreting, creating, computing, and communicating using visual, audible, and digital materials across disciplines and in any context. It includes reading and writing, and also thinking, listening, and speaking.<sup>247</sup>
- **MORPHOLOGY:** the knowledge of meaningful word parts in a language, including prefixes, suffixes, and/or root words. Knowledge of word structure and how words are formed is linked to both greater vocabulary development and stronger reading comprehension. Research has shown that in children as young as first grade, knowledge of word parts has influenced their literacy development.<sup>248</sup>
- **MORPHOLOGICAL AWARENESS:** knowledge of the parts of words, such as prefixes, suffixes, and root words. Instruction in morphology is suggested to be an important complement to instruction in phonics and phonological awareness.<sup>249</sup>

239 [National Reading Panel, n.d.](#)

240 [ODE, n.d.-a](#)

241 Moll et al., 1992; [Nguyen & Commins, 2020](#); Velez-Ibanez & Greenberg, 1992

242 [University of Florida Literacy Institute, n.d.](#)

243 [University of Florida Literacy Institute, n.d.](#)

244 [ODE, 2022b](#)

245 [Center for Teaching Innovation, n.d.](#)

246 [Early Childhood Learning Center, 2019](#)

247 [International Literacy Association, n.d.](#)

248 [Foorman et al., 2016](#); [DESE, 2023b](#); Prince, 2010; Wolter & Green, 2013; Wolter et al., 2009

249 [DyslexiaHelp, n.d.](#)

- **MULTILINGUAL LEARNER:** a student who, by reason of foreign birth or ancestry, speaks or understands languages other than English, speaks or understands little or no English, and/or requires support in order to become proficient in English.<sup>250</sup>
- **ORTHOGRAPHY:** a language’s conventional spelling system.
- **ORTHOGRAPHIC MAPPING:** a process that involves the brain making connections between phonemes (sounds) and graphemes (spelling): this is what an emerging reader is doing when they confront a new word. Orthographic mapping is the process of forming connections between graphemes and phonemes, in order to store memories of spelling bonded to the pronunciation of words. Orthographic mapping is what allows readers to automatically comprehend what they are reading, so they can focus on content and meaning. Once words are “mapped” into the reader’s memory, there is no longer need for decoding letter by letter or grapheme by grapheme. Foundational reading instruction that assists learners in successfully decoding and mapping words can build a lifetime of reading success.<sup>251</sup>
- **PHONEMES:** a letter or letter combination that spells a phoneme; can be one, two, three, or four letters in English (e.g., e, ei, igh, eigh).<sup>252</sup>
- **PHONICS:** the associations between sounds and print. One of the Five Pillars of Reading.<sup>253</sup>
- **PHONOLOGICAL AWARENESS:** sensitivity to, or awareness of, the sound structure of words. One of the Five Pillars of Reading.<sup>254</sup>
- **PRAGMATICS:** In linguistics (the study of language) pragmatics is a specialized branch of study, focusing on the relationship between natural language and users of that language.<sup>255</sup>
- **RESEARCH-BASED LITERACY PRACTICES:** refers to models, theories, and practices that are based on the best research available in the particular field of study. These practices differ from evidence-based in that they have not been researched in a controlled setting to measure for efficacy.
- **SCIENCE OF READING:** neurological and cognitive science studies of how brains process written words,<sup>256</sup> and includes a broad collection of research from multiple fields of study including cognitive science, learning sciences, literacy research, and instructional science and research broadly.<sup>257</sup>
- **SEMANTICS:** the meaning and interpretation of words, signs, and sentence structure.
- **SOCIAL EMOTIONAL LEARNING (SEL):** the process through which children and adults learn to pay attention to their thoughts and emotions, develop an awareness and understanding of the experience of others, cultivate compassion and kindness, learn to build and maintain healthy relationships, and make positive, prosocial decisions that allow them to set and achieve their positive goals.<sup>258</sup>
- **SYNTAX** The branch of grammar dealing with the way in which linguistic elements (such as words) are put together to form constituents (such as phrases or clauses).<sup>259</sup>
- **SYSTEMATIC INSTRUCTION:** a carefully planned sequence of instruction with lessons that build on previously taught information, from simple to complex.<sup>260</sup> Systematic instruction builds on scaffolding as student knowledge grows.<sup>261</sup>

250 [NYSED, 2019](#)

251 [Ehri, 2022](#)

252 [University of Florida Literacy Institute, n.d.](#)

253 [National Reading Panel, n.d.](#)

254 [National Reading Panel, n.d.](#)

255 [MasterClass, 2021](#)

256 [Shanahan, 2021](#)

257 [National Center on Improving Literacy, 2022](#)

258 [ODE, n.d.-a](#)

259 [Merriam-Webster, \(n.d.\), Definition 1](#)

260 [Dyslexia-Related Training: Definitions, 2018; ODE, 2018c](#)

261 [The Meadows Center for Preventing Educational Risk, 2020](#)

- **TARGETED UNIVERSALISM:** setting universal aims that are pursued by universal and targeted processes to achieve those aims.<sup>262</sup> Applying Targeted Universalism provides an operational pathway to lead for educational change in a way that bridges relationships and perspectives while maintaining dedicated and precise attention on focal students and their families.<sup>263</sup>
- **TIME IMMEMORIAL:** a point of time in the past that was so long ago that people have no knowledge or memory of it.
- **TRANSLANGUAGING:** “the discourse practices of bilinguals, as well as to pedagogical practices that use the entire complex linguistic repertoire of bilingual students flexibly in order to teach rigorous content and develop language practices for academic use.”<sup>264</sup>
- **UNIVERSAL DESIGN FOR LEARNING (UDL):** a framework to improve and optimize teaching and learning for all people based on scientific insights into how humans learn.<sup>265</sup> UDL provides a research-based framework for teachers to incorporate flexible materials, techniques, and strategies for delivering instruction and for students to demonstrate their knowledge in a variety of ways.<sup>266</sup> Teaching materials and methods are the focus of change, instead of placing the burden on students to adapt to the curriculum.<sup>267</sup>
- **VOCABULARY:** The part of semantics concerning word meanings and word relations.. One of the Five Pillars of Reading.<sup>268</sup>
- **WELL-ROUNDED EDUCATION:** an education that includes the arts, humanities, sciences, social sciences, language arts, and math. Background knowledge in these subjects allows students to transfer the ability to read into other subjects and experiences that require them to make meaning of what they read. Therefore, a content-rich curriculum is not just a necessary building block for educational attainment but for comprehension beyond the classroom.<sup>269</sup>

262 [ODE, 2022c](#)

263 [ODE, 2022c](#)

264 [Marrero-Colón, 2021](#)

265 [CAST, 2022](#)

266 [The IRIS Center, 2009](#)

267 [CAST, 2013](#)

268 [National Reading Panel, n.d.](#)

269 [Jimenez & Sargrad, 2018](#)

# Appendix D: Reading Research & References

Appendix D contains sources cited within Oregon’s Early Literacy Framework, as well as sources that inform our work more broadly.

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OREGON  
DEPARTMENT OF  
**EDUCATION**

# Oregon's Early Literacy Framework

A Strong Foundation for Readers and Writers

(Kindergarten - Grade 5)

## Overview

### Vision

Children must have access to consistent, culturally responsive, and research-aligned literacy instruction that guarantees reading and writing proficiency in at least one language. Parents and caregivers must be supported as full partners in their children's literacy development.

Elementary teachers must be prepared and supported to identify individual student strengths and needs, and to teach reading and writing in research-aligned ways. This includes creating the conditions for students to effectively learn.

### Current Reality

**Oregon is not meeting this vision.** We have low English Language Arts proficiency rates across the board for all student groups and **persistent opportunity gaps** that were worsened by the pandemic.

We must take a long-term approach to improve how we support our students' literacy development inside and outside the classroom.

### Guiding Principles

- Literacy begins at birth.
- Families and communities strengthen school-based learning.
- Every child is full of literary promise.
- Foundational skills matter.
- Every student can be taught to read and write.
- Multilingualism benefits everyone.
- Educator knowledge and classroom practices are essential.

### Roadmap for Educators

**Oregon's Early Literacy Framework provides a research-based vision for how we teach reading and writing.** It also provides a practical roadmap for elementary educators and school leaders to grow every student's literacy skill using consistent, research-based approaches.

But even research-based instruction paired with the best teachers are not sufficient to support a child's literacy development. Students must feel like they belong and feel safe at school in order to develop reading and writing proficiency, along with any other academic learning.

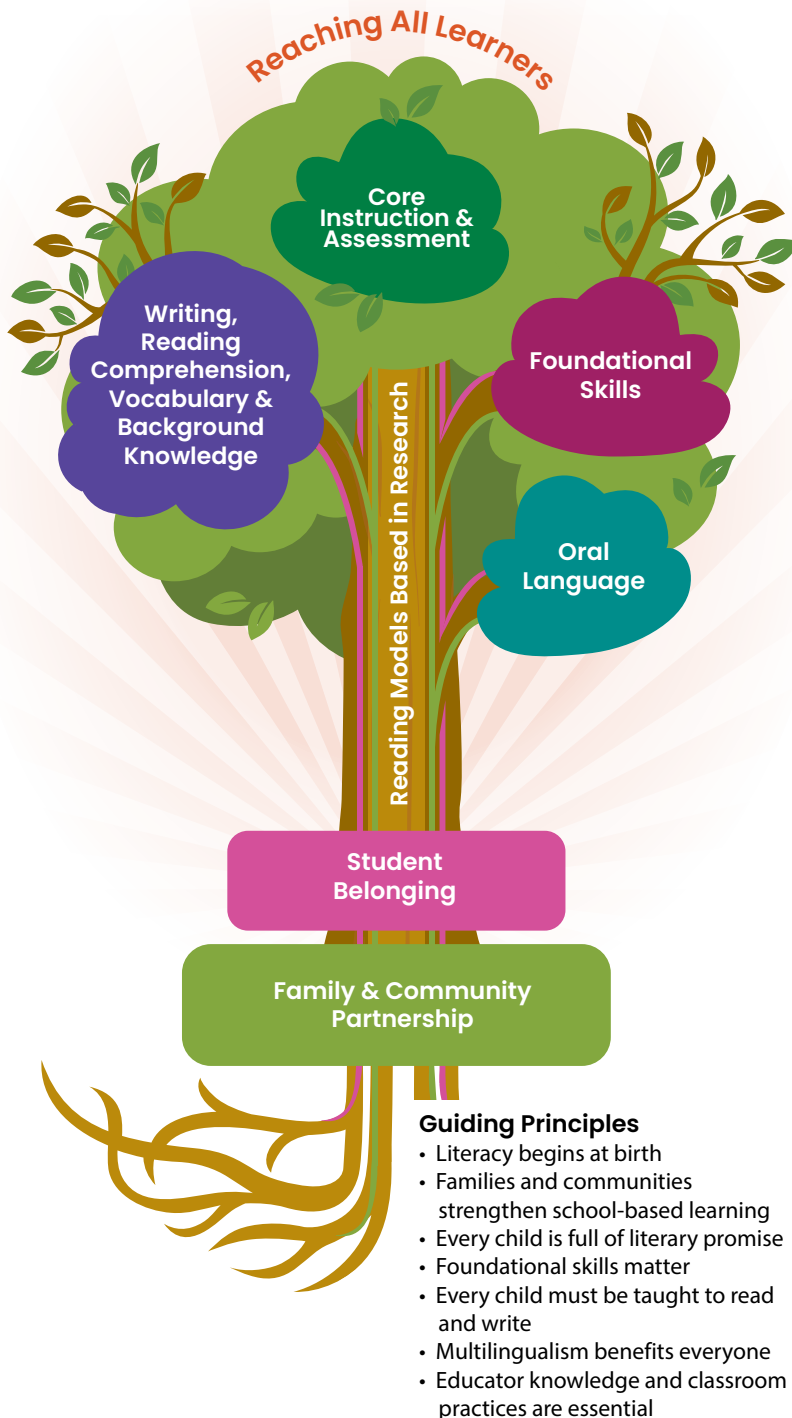
### Core Purpose of Framework

- Build statewide coherence, clarity, and common ground.
- Fuel action and improvement.
- Support districts and schools in implementation of a comprehensive literacy vision and plan.
- Serve as a shared north star for educators, leaders, community, in alignment with the Governor's vision for improving student literacy outcomes.

This document provides an overview of Oregon's Early Literacy Framework. The full framework with more detail, intended for school leaders and educators, is available [here](#).



# Framework Overview



Oregon's Early Literacy Framework includes eight sections that work in reciprocity with one another to help reinforce culturally responsive practice and reading science as fundamental to children's literacy and multilingual development.

- ▶ **Section 1: Student Belonging – A Necessary Condition for Literacy Learning**
- ▶ **Section 2: Family & Community Partnerships**
- ▶ **Section 3: Oral Language as the Root of Literacy Development**
- ▶ **Section 4: Reading Models Based in Research**
- ▶ **Section 5: Foundational Skills**
- ▶ **Section 6: Writing, Reading Comprehension, Vocabulary & Background Knowledge**
- ▶ **Section 7: Core Instruction & Assessment**
- ▶ **Section 8: Reaching All Learners**

Figure 1 reflects the reciprocal and interconnected relationship between the sections and reinforces the importance of the ways in which all sections of the framework co-exist in relationship with one another.

This framework builds momentum and capacity for strengthening belonging and literacy instruction in every elementary classroom so that all children leave elementary school proficient in reading and writing in at least one language. It speaks to the comprehensive nature of literacy instruction and underscores the complexity of learning to read and write.

**Figure 1. Oregon's Early Literacy Framework Graphic**

This framework aims to be a foundational literacy resource for K–5 classroom teachers, specialists, elementary school principals/K–8 principals, superintendents, district leaders, and education service district leaders. More broadly, it is relevant for all who are committed to seeing literacy learning maximized for every student through high-quality instruction.

# Oregon's Early Literacy Framework


A Strong Foundation for  
Readers and Writers (K-5)



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## Leading for Literacy

### Oregon's Early Literacy Framework

An illustration showing several hands of different skin tones (light, medium, and dark brown) reaching up from the bottom and sides to hold each other in a circle. The background is a light blue sky with soft white clouds. The hands are wearing various colored sleeves: yellow, blue, red, green, and grey.

The Oregon Department of Education, Education Service Districts, school districts, and public charter schools hold **an essential responsibility** to ensure **every child in Oregon** reads and writes with confidence and competence (ideally in more than one language).

# Purpose for Today's Presentation

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- To highlight the **purpose and audience** of the framework
- To provide a **high level overview** of the framework
- To outline **framework development and engagement around the drafting/crafting** of the framework



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# Framework Purpose & Audience

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# Governor Kotek's Early Literacy Education Priorities

Literacy is the foundation for learning, but far too many students are not getting the intentional literacy support and experiences designed to reflect each student's needs and strengths. The Governor's budget proposes \$120 million to **ensure all children are supported to learn to read, followed by reading to learn.**

...

This programming must be **aligned with evidence-based strategies and integrated with culturally responsive approaches.**

# Purpose

- Build statewide coherence, clarity, and common ground.
- Fuel action and improvement.
- Support districts and schools in implementation of a comprehensive literacy vision and plan.
- Serve as a shared north star for educators, leaders, community, in alignment with the Governor's vision for improving student literacy outcomes



# Audience

- This framework aims to be a foundational literacy resource (or mentor text), for K-5 classroom teachers, specialists, elementary school principals/K-8 principals, superintendents, district leaders, and education service district leaders.
- More broadly, it is relevant for all who are committed to seeing literacy learning maximized for every student through high-quality instruction.

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# Framework Overview

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# Overview



## Oregon's Early Literacy Framework:

- builds momentum and capacity for strengthening belonging and literacy instruction in every elementary classroom<sup>401</sup> so that all children leave elementary school proficient in reading and writing in at least one language.
- speaks to the comprehensive nature of literacy instruction and underscores the complexity of learning to read and write.

## Literacy begins at birth

The first sounds a child may hear or see (signed) are the voices of the people in their home environment, building neural pathways and serving as the initial source of knowledge about language and their world. Families and caregivers are essential first partners in oral language development that cultivates later success in literacy and life.

## Multilingualism benefits everyone

When families' cultural and linguistic assets become an integral part of the instructional experience, children's literacy skills and dispositions deepen. Culturally responsive instructional practices that serve multilingual students are proven strategies to accelerate and deepen learning for every child.

## Families and communities strengthen school-based learning

Outside of school, children spend most of their lives at home or in the community. Parents and caregivers have a role to play in reinforcing the learning that happens at school as much as possible at home, and they must be supported as full partners in their children's literacy development. Children's literacy learning is deepened through their lived experiences, where language, culture, and identity are affirmed by families and caregivers who serve as important

## Every child must be taught to read and write

This responsibility is met by effective literacy instruction rooted in reading and writing research; culturally responsive and inclusive practices; Oregon's learning standards; high-quality instructional materials; and targeted support.

## Every child is full of literary promise

School systems and instructional practices must be designed around a fundamental belief that children can be taught to read and write, supported by high expectations and ongoing feedback. Adults must have a mindset that sees children as brimming with literary, cultural, and linguistic strengths ready to be seen and expanded.

## Foundational skills matter

Literacy is not possible without foundational skills, systematically taught in an organized order that builds on one another. Across the K-5 continuum, literacy instruction must explicitly and systematically build students' foundational skills alongside the application of vocabulary, comprehension, and writing.

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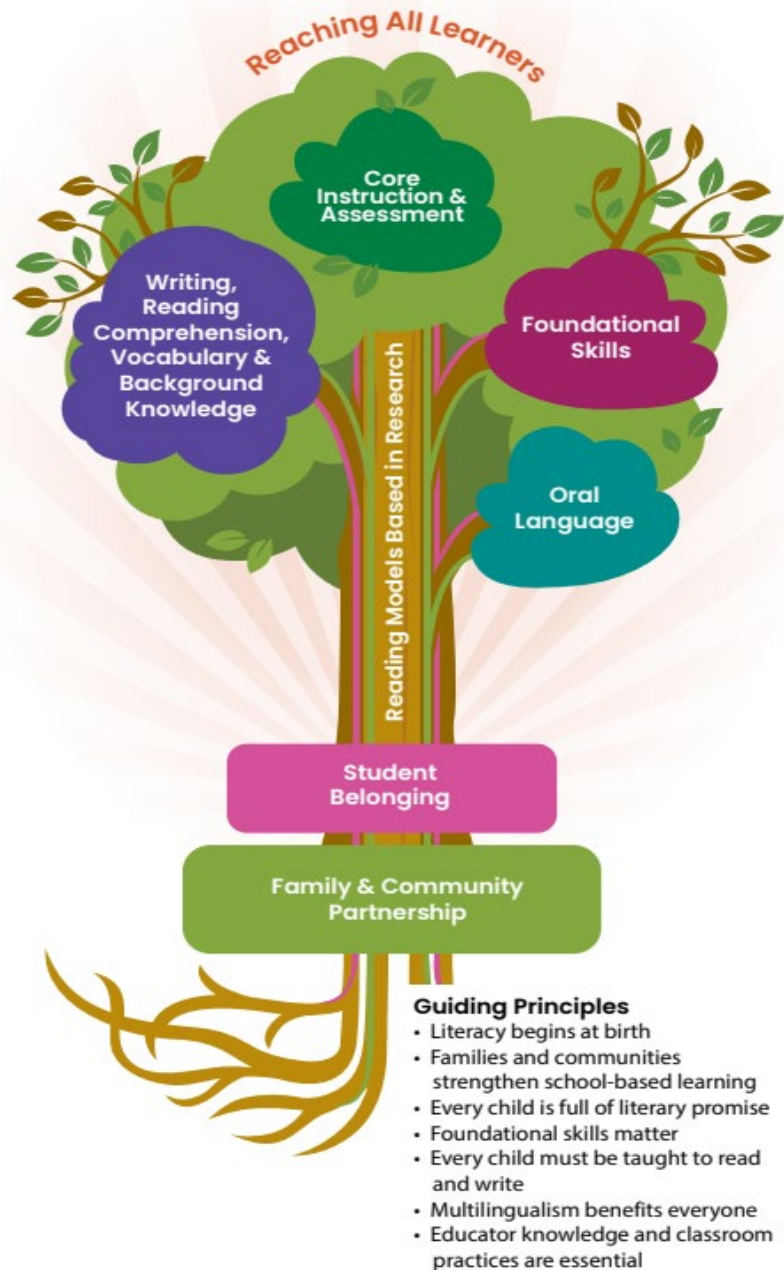
## Educator knowledge and classroom practices are essential

Teacher and leader professional learning must be comprehensive and designed to include training on foundational skills, oral language, writing, vocabulary, and background knowledge, as well as professional learning around culturally responsive practices and student belonging. Professional learning must be inclusive of literacy strategies that benefit students who experience disability, students with dyslexia, and multilingual learners. Educators are most successful when professional learning, time for planning and collaboration, as well as consistent encouragement and formative feedback, are present.

# Eight Sections

1. Student Belonging: A Necessary Condition for Literacy Learning
2. Family and Community Partnerships
3. Oral Language as the Root for Literacy Development
4. Reading Models Based in Research
5. Foundational Skills
6. Background Knowledge, Vocabulary, Reading Comprehension & Writing
7. Instructional Core and Assessment
8. Reaching All Learners

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# Section 1: Student Belonging: A Necessary Condition for Literacy Learning

**Building inclusive and supportive environments in schools that nurture belonging is essential to growing readers and writers.**

- Culturally Responsive Practices
  - High Expectations with Responsive Support
  - Diverse Texts
- Social and Emotional Learning



## Section 2: Family and Community Partnership

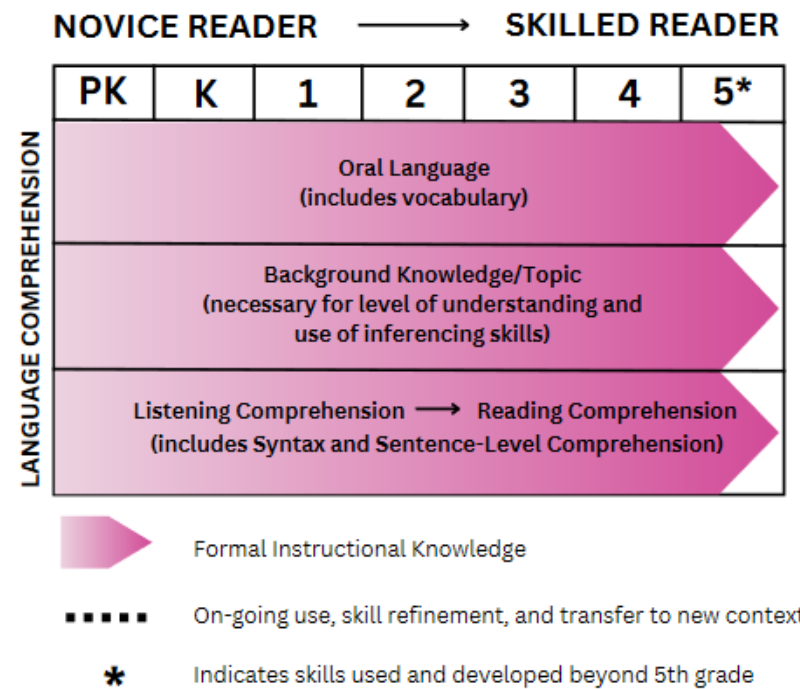
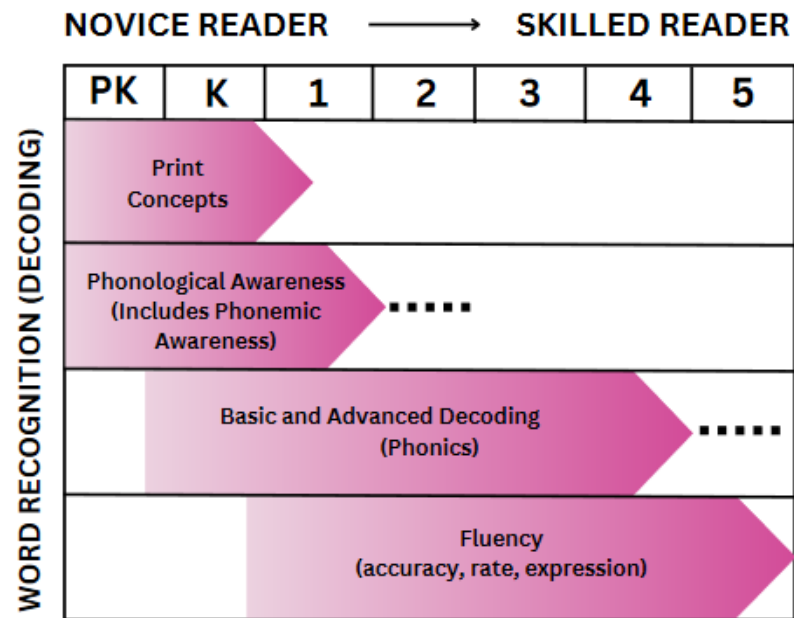
**Across almost every facet of literacy development, support and collaboration with families, tribes, and community-based organizations strengthens student literacy development and serves as accelerators for student success.**

- Literacy Starts at Home
- Literacy Learning Before Kindergarten
- Supporting Literacy Through Expanded Learning
  - The Role of Libraries
  - Hours Outside the School Day
  - Literacy During Summer and School Breaks



# Section 5: Foundational Skills

Competency with foundational skills serves as the groundwork from which readers and writers can successfully understand and enjoy what they read.



# New ODE web page

- Overview
- Framework
- Playbook
- Resources

## Oregon's Early Literacy Framework: A Strong Foundation for Readers and Writers (K-5)

***Oregon is committed to improving literacy learning for every Oregon student.***

In November of 2021, ODE, through a community engagement process, identified an update to Oregon's 2009 Literacy Framework as a key investment of ESSER state set-aside dollars. This work was reinforced by Governor Kotek naming early literacy as one of her priorities for education. The purpose of the revised framework is to build statewide coherence, clarity, and common ground; fuel action and improvements; support districts and schools in the implementation of a comprehensive literacy vision and plan; and serve as a shared north star for educators, leaders, and community.



### [An Overview of Oregon's Early Literacy Framework](#)

## Oregon's Early Literacy Framework

[Find out Why and What](#)

Oregon's Early Literacy Framework builds momentum and capacity for strengthening belonging and literacy instruction in every elementary classroom so that all children leave elementary school proficient in reading and writing in one or more languages. It speaks to the comprehensive nature of literacy instruction and at its core, is designed to be used as a primary resource (or mentor text) for district leaders and school leaders. The framework is designed around eight sections that work in reciprocity with one another to help reinforce culturally responsive practice and reading science as fundamental to children's literacy and biliteracy development.

## EARLY LITERACY PLAYBOOK

A game changer for school and system leaders

[Find out How](#)

Instruction Partner's Early Literacy Implementation Playbook provides ready-to-use, step-by-step guidance. Early literacy leaders and educators can use this playbook to strengthen and monitor literacy development in their school or system, whether building the essential implementation practices from scratch or tuning up what they already have in place.



# Framework Development and Consultation

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# Development Story

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## **Initial Drafting, Research and Review (August-December 2022)**

*A cross-office ODE team convened to focus on the ESSER Literacy investment and the revision of the 2009 literacy framework. They reviewed the literacy plans from forty-seven states, met with other state literacy leaders to learn about literacy efforts across the nation, and conducted interviews with literacy experts to gather their framing perspective and input.*

## **Preview Draft Crafting & Release (January-March 15, 2023)**

*Written in collaboration with REL Northwest and Marzano Research, the preview draft was an attempt to synthesize the latest research and comprehensive perspectives around literacy development. By releasing in mid-March, ODE was able to gather input and design for a stronger final version.*

## **Consultation & Rewrite (April-May 2023)**

*Focus groups with key community partners occurred across April/May and included 152 participants across 21 sessions. The preview draft was also reviewed by local and national literacy experts. All input was synthesized and the framework was rewritten and finalized.*

## **Final Framework Release (May 30, 2023)**

*ODE published Oregon's Early Literacy Framework: A Strong Foundation for Readers and Writers (K-5).*

# Consultation and Review

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## Experts Providing Review

- Dr. Barbara Foorman, Florida State University
- Dr. Ronda Fritz, Eastern Oregon University
- Dr. Julie Esparza Brown, Portland State University
- Dr. Audrey Lucero, University of Oregon
- Dr. Rachel Snyder Bhansari, Portland State University
- Dr. Amanda Kibler, Oregon State University
- Dr. Claude Goldenberg, Stanford University
- Dr. Anita Archer, Researcher and Educational Consultant
- Dr. Dot McElhone, Portland State University

## Focus Group Engagement

- 21 focus groups offered
- 152 external participants



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# Partial Consultation List

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- All Hands Raised
- Children's Institute
- Center on Reinventing Public Education
- Coalition of Oregon School Administrators
- Decoding Dyslexia
- Dual Language Cross-District Cadre
- Early Learning Division Chief of Programs Group
- Education Service District Teaching, Learning/Curriculum Directors
- Education Service District Special Education Directors
- Education Service District Equity, Diversity, Inclusion Directors
- English Learner Success Plan Advisory Group
- LGBTQ2SIA+ Student Success Advisory Group
- NAYA
- Oregon Association of Latino Administrators
- Oregon Association of Education Service Districts Program Directors
- Oregon chapter of the International Dyslexia Association
- Oregon Education Association
- Oregon Small Schools Organization
- Oregon RTII
- Oregon Kids Read
- Stand for Children
- Reading Results
- The Blosser Center
- The Institute for Multi-Sensory Education
- The Shadow Project
- Willamette Valley Dyslexia

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# What People said Resonated

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## Approach to the Early Literacy Framework

- Starting the document focused on establishing a **sense of belonging for students** and **centering families and student experiences** within the framework
- **Focus on oral language** as a foundational component of reading instruction and **instructional practices aligned with current literacy research**

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## Representativeness and focus on student needs

- **Inclusive and strength-based language and practices** integrated throughout the framework
- Inclusion of a section on **multilingual learners**
- Clear connections between core instruction and literacy intervention for **students with disabilities**

## Relevance and Usability

- **Alignment to ODE guidance and existing literacy training** in the state
- **Overall readability document** with regards to organization, layout, and flow

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# Questions?

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At its heart, Oregon's Early Literacy Framework is intended to build momentum and capacity for strengthening belonging and literacy instruction in every elementary classroom so that all children leave elementary school proficient in reading and writing in one or more languages, with as many opportunities to build on their funds of knowledge in additional languages as possible.

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THANK  
YOU