



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 Zoom Thursday, January 16, 2025

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

Please note: all times are approximate.

1. Call to Order

A. **Roll Call**

Time: 9:00 AM

B. **Board Member Reports**

Time: 9:05 AM

C. **Break**

Time: 10:05 AM

D. **Director's Report**

Time: 10:10 AM

2. Public Comment

Time: 10:40 AM

A. The State Board of Education will hold space for **virtual** public comment. 3
Individuals must register to provide virtual comment. Written public comment received will be posted to BoardBook.

3. Consent Agenda

Time: 10:55 AM

A. Technical Fix: Transfer of Student Educational Records 5
B. Instructional Materials Substitution Request 10
C. Instructional Materials Adoption Criteria: Social Science 15
D. Technical Fix: Intensive Program Proposed Rule Changes: Temporary Rules 25

4. Adoptions

A. House Bill 4137 (2024) Implementation: International Baccalaureate Students and the Oregon Diploma 41

Time: 11:00 AM

Kristidel McGregor, Office of Teaching, Learning, and Assessment

B. Senate Bill 283 (2023) Implementation: Education Workforce Survey Administration Rules 78

Time: 11:30 AM



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Tamara Dykeman, Office of the Director and Josh Rew, Office of Research, Assessment, Data, Accountability, and Reporting

5. First Readings

A. Early Literacy Tribal Grant Rule Amendment: OAR 581-017-0805 and 581-017-0807 87

Time: 11:40 AM

April Campbell and Nicole Barney, Office of Indian Education

B. Technical Fix: Modified Diplomas 108

Written Report Only

C. Technical Fix: Intensive Program Proposed Rule Changes 117

Written Report Only

6. Break for Lunch

Time: 12:00 PM

7. Informational Reports

A. A Study In Equity: Oregon's Ninth Grade Transition 133

Time: 1:00 PM

Dan Farley, PhD, Office of Research, Assessment, Data, Accountability, and Reporting and Keith Zvoch, PhD, University of Oregon

8. Adjourn

Time: 1:30 PM

From: [Jeff Myers](#)
To: [SCURLOCK Jennifer * STBRD](#); [Shimiko Montgomery](#); [RICHARDSON Cynthia * STBRD](#); [LOPEZ SANCHEZ Vicky * STBRD](#); [FORDE Libra * STBRD](#); [KHALIL Mona * STBRD](#); [WHEELER Bridgett * STBRD](#); [StateBoard Public Email](#)
Subject: Following up on yesterday's public comment
Date: Friday, January 17, 2025 12:11:14 PM
Attachments: [Roast of the Oregon Public School System - 1-16-2025.pdf](#)

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

Good day to you all,

I noticed one board member had wandered off during my public comment, and another may not have been in attendance yesterday. So to be sure you all had the opportunity to hear what I had to share, I thought I'd send you a PDF version of my comments (see attached).

I also wanted to add that my comments, while delivered in an unconventional way, were intended to address serious concerns. As the body that sets policies and standards for all Oregon public schools, you have an incredible responsibility to all students. The decisions you make have a direct and lasting impact here.

Over the last few years, the board has consistently failed to uphold its duty to ensure our education system delivers academic success for our children. Here's just a few examples:

- Stood behind blatantly fraudulent research produced by the Oregon Department of Education
- Effectively bypassed the legislature (per ODE's request) by extending the pause on high-school graduation requirements
- Approved radical K-12 standards across multiple subject areas that are not research-backed and evidence-supported (Social Sciences, Social Emotional Learning, etc.)

That said, you can just as easily make things right by immediately addressing these issues. I have no doubt this is easier said than done, as doing the right thing is rarely easy. However, the longer this craziness is allowed to continue, the more difficult it will be to make things right. Not to mention the additional harm this broken system will do to children around our state.

Please feel free to reach out if you'd like to connect or if you have any questions about the concerns I raised. Thank you and have a good day.

Jeff Myers | Save Oregon Schools
503-703-7335 | jeff@saveoregonschools.org
[X](#) | [Facebook](#) | [News](#) | [Education Resources](#)

Roast of the Oregon Public School System

By [Jeff Myers](#) | [Save Oregon Schools](#) | saveoregonschools.com | January 16, 2025

Thank you all very much for the opportunity to share a few thoughts about our public school system—a system that proves the old saying wrong: apparently, *you can* throw more money at a problem and make it worse!

Let's talk about spending. Oregon schools are swimming in cash. Budgets have been growing faster than weeds in the Willamette Valley, but the results? Well, let's just say if education were a race, Oregon's school system would be that kid running in the wrong direction... but don't worry, they'll still get a participation trophy!

And let's not forget testing—or should I say, the *war against testing*. Our education leaders are all for data—except when it's "*inconvenient*", like showing how poorly kids are actually doing. They say we should stop testing because it's unfair to the kids. But let's be real: it's not the kids who are failing the tests, it's the system. You can't fake a passing score when the truth bubbles in on a Scantron, can you?

And speaking of truth, let's talk about how the state is handling all that extra funding. Instead of doing things that are proven to work, like hiring more teachers and reducing class sizes... we're getting equity consultants, *community listening sessions* where they do most of the talking, and workshops to teach kids how to feel better about not knowing the quadratic formula. Oregon's philosophy is: why fix the problem when you can spend millions *talking about* fixing it?

Now, about those grades. Oregon schools are becoming experts at inflating them. A kid could show up half the time, spell their own name wrong, and still pass with a solid B. But hey, that diploma looks great on Instagram, and isn't that what really matters?

And while we're at it, let's give a shoutout to the curriculum. Oregon's idea of preparing students for the future involves teaching them how to protest—but not how to balance a checkbook. Kids are coming out of high school ready to change the world, but only if that world doesn't require basic math or literacy skills.

Then there are our school buildings. Oregon has a great tradition of spending lavishly on new facilities. But with no real improvement in academic performance, these schools are starting to look like castles built on quicksand. At least the shiny buildings make a nice backdrop for those union picket lines.

And the leadership? Let's just say our education leaders could hold a masterclass in shifting blame. They blame unconscious bias, institutional racism, and a lack of belonging, whatever that means—but never their own policies and actions. If there were an Olympic event for excuse-making, they'd bring home the gold every time!

So, here's to the Oregon public school system: where spending goes up, results go down, and every new policy is a Hail Mary with no receiver in sight. But hey, at least they're consistent!



Oregon State Board of Education

January 16, 2025

AGENDA ITEM: 3.A.

<p>SUBJECT: Transfer of Student Educational Records Technical Fix</p> <p>STAFF NAME & OFFICE: Kara Nystrom Boulahanis, Interim Director of IDEA Initiatives, and Don Dorman, Education Programs Specialist, OESO</p> <p>Summarize issue: Technical fix of existing OARs to clarify options for Oregon educational agencies when storing and transferring student educational records, and to maintain equitable access to paper student records.</p> <p><input type="checkbox"/> New Rule <input checked="" type="checkbox"/> Amend Existing Rule <input type="checkbox"/> Repeal Rule</p>	<p>First Reading <input type="checkbox"/> Presentation <input type="checkbox"/> No Presentation <input checked="" type="checkbox"/> Action <input type="checkbox"/> Temp Rule <input type="checkbox"/> Presentation <input checked="" type="checkbox"/> No Presentation</p>
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BACKGROUND

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

1. History:

- a. The passage of House Bill (HB) 4124 (2022) required the Oregon Department of Education (ODE) to review challenges and develop solutions to the transfer of student education records. A committee of interested partners was assembled as required by the bill. The 4124 Committee examined in detail the complexities surrounding the transfer of student records in the state, highlighting significant issues including delays in both receiving and in sending student records, as well as challenges with storage and distribution of both electronic and paper student records.
- b. What is the current requirement in rule or statute?
OAR 581-021-0220 Definitions – Defines what constitutes an educational record.
OAR 581-021-0255 Transfer of Student Educational Records - provides requirements for the transfer of educational records including timelines.
- c. Why is this rule being brought forward right now?
To bring forward one of the recommendations from the House Bill (HB) 4124 (2022) committee recommendations to improve transmittal of student educational records.

2. Purpose

- a. Current rule OAR 581-021-0220 Definitions terms used throughout this division. Current rule OAR 581-021-0255 Transfer of Student Educational Records describes the processes and timelines for transfer of student educational records between educational agencies.
- b. How long has the rule been in place? Rule established 2011, with a revision in 2007

3. Does the board have any areas of discretion or is this strictly mirroring statute?

Oregon State Board of Education

January 16, 2025

AGENDA ITEM: 3.A.

The Board has little discretion on these technical fixes.

4. Stakeholder voice/input (individual and collective i.e., groups)

- c. Who was involved in bringing this to the Board? OESO on behalf of the HB 4124 Committee
- d. What did engagement in this process entail? Extended engagement on this topic from the HB 4124 Committee, as well as community engagement (survey) of the committee members and the Oregon registrars List-Serv. Consultation with the SOS Records Archivist to ensure alignment with other statutes governing records.
- e. Who may be affected by this? Registrars and office staff at all Oregon educational agencies
- f. Whose voice is missing? None noted.
- g. What additional information does the Board need prior to moving forward? None.

SUMMARY OF PREVIOUS BOARD ACTION

1. This item was first read before the Board in December

HAS THE RULE CHANGED SINCE LAST BOARD MEETING?

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

POLICY ISSUE OR CONCERNS

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

1. Stakeholders
 - a. How have you intentionally involved stakeholders who are also members of communities affected by this rule?
 - i. This request resulted from a legislative committee exploring barriers to quick transfer of critical student records. Additionally, school Registrars were contacted and surveyed for input on these recommended technical fixes.
 - b. Who are the historically underserved groups affected?
 - i. Students with high mobility rates during their education, such as children in foster care, substitute care programs, or eligible for Migrant Education services.
 - c. Has there been consultation or collaboration with tribes in this rule change or policy decision?

Oregon State Board of Education

January 16, 2025

AGENDA ITEM: 3.A.

- i. No
 - d. How has the Oregon Department of Education modified or enhanced the rule change or policy decision to address the needs of historically underserved communities?
Changes will benefit all students changing educational settings.
- 2. Negative/Positive Effects
 - a. What is the impact on the population most affected by this rule that the board should consider?
 - i. This rule change will promote quicker access to educational history, current transcripts, relevant reports, and identified supports for the student's new educational placement
 - b. What possible opportunities, assets or access could this rule provide?
 - i. With quicker access to critical information about the student, receiving educational agency will be able to prepare and provide supports sooner, reducing the negative impacts of a transition event.
 - c. What is the impact on eliminating the opportunity or achievement gap?
 - i. These changes would promote faster transfer of critical support information for students who are changing educational settings.
 - d. Have all the potential unintended consequences been considered?
 - i. Yes
 - e. Does this rule advance the ESSA goals?
 - i. Yes
- 3. What are the barriers to more equitable outcomes?
 - a. None noted

EQUITY IMPACT ANALYSIS

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

- 1. How are historically underserved populations impacted by this docket item?
 - a. For all students who transfer between educational agencies, including highly mobile students, students who are eligible for McKinney-Vento protections, and students experiencing disability, these updates will help districts speed the record transfer process by providing multiple options, including immediate electronic transfer.
- 2. Explain how the rule change, policy or action works toward improving achievement, opportunities and a sense of worthiness for underserved students?
 - a. Expediting the efficient transfer of student educational records allows for receiving educational agencies to more quickly obtain critical support information about the student, allowing for less disruptive impact for the student who is transferring.

FISCAL ANALYSIS

Oregon State Board of Education

January 16, 2025

AGENDA ITEM: 3.A.

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. There is no expected impact on ODE’s budget.
2. How does the proposed rule change impact school districts and ESDs?
 - a. Potential cost savings: Currently districts are required to share paper copies, so this will allow them to avoid the costs of sending paper copies unless they are specifically requested.
3. How does the proposed rule change impact schools and other educational institutions?
 - a. Expands options for districts and ESDs who are engaged in movement toward digital student record management. Also allows districts to remain with current paper processes if that is their process.
4. Does the proposed rule change impact other stakeholders?
 - a. No.

EFFECT OF A “YES” OR “NO” VOTE

A ‘Yes’ vote would clarify language in the rules addressing transferal of electronic student records. A ‘No’ vote would leave the current language undefined in this area.

STAFF RECOMMENDATION

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

ATTACHMENTS

Attachment 1:

OAR 581-021-0220 Definitions

(13) "Record" means any information recorded in any way including, but not limited to, handwriting, print, **electronically**, tape, film, microfilm and microfiche.

OAR 581-021-0255 Transfer of Student Educational Records

(4) The educational agency must retain originals of student education records for the time periods and under the conditions described in the record retention rule, OAR 166-400-0060, except that originals **or a printed copy of the record** shall be transferred to a new education agency upon request.

(5) When original records have been transferred to a new educational agency as required in subsection (2) of this rule, readable ~~photocopies~~ **copies** of the following documents must be retained by the former educational agency or institution for the time periods and under the conditions as prescribed in the record retention rule, OAR 166-400-0060:

Sept. 9, 2024

State Superintendent of Public Instruction
Oregon Department of Education

Re: Substitution Request for
Amplify CKLA 2nd Edition Universal digital experience > Amplify CKLA 2nd Edition CCSS
digital experience

Dear Sir or Madam:

Amplify Core Knowledge Language Arts (CKLA) for grades K-5, 2nd Edition, was reviewed and approved for adoption by the Oregon Department of Education in 2021 and is currently on contract through June of 2028. As part of the program, districts received access to the Universal version of the Amplify CKLA digital experience. Oregon districts have expressed interest in a Common Core State Standard (CCSS) version of the CKLA digital experience. In response to this request from Oregon educators, Amplify is pleased to officially submit a substitution request for the Amplify CKLA 2nd edition CCSS digital experience. Please find details for the adopted and substitution titles to follow:

Category	Title	Author	Copyright	Publication Date
Adopted Title				
Category 1: English Language Arts & Literacy Grades K-2	CKLA 2nd Edition, K-2, Student & Teacher Digital Interactive Licenses (UVL)	Amplify/Core Knowledge Foundation	2020	4/1/2019
Category 2: English Language Arts & Literacy Grades 3-5	CKLA 2nd Edition, 3-5, Student & Teacher Digital Interactive Licenses (UVL)	Amplify/Core Knowledge Foundation	2020	4/1/2019
Substitution Title				
Category 1: English Language Arts & Literacy Grades K-2	CKLA 2nd Edition, K-2, Student & Teacher Digital Interactive Licenses (CC)	Amplify/Core Knowledge Foundation	2020	4/1/2019

Category 2: English Language Arts & Literacy Grades 3-5	CKLA 2nd Edition, 3-5, Student & Teacher Digital Interactive Licenses (CC)	Amplify/Core Knowledge Foundation	2020	4/1/2019
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Please note that if approved for substitution, Amplify CKLA 2nd edition CCSS digital experience, will be supplied to Oregon schools at the contract price of the originally adopted title, Amplify CKLA 2nd edition UVL digital experience,.

Amplify CKLA 2nd edition CCSS digital experience can be reviewed via the links and credentials listed below :

Website: learning.amplify.com

Teacher Login: t1.cklaor@tryamplify.net

Student Login: s1.cklaor@tryamplify.net

Password: AmplifyNumber1

The Amplify CKLA digital experience site offers robust, slides-based lessons that enhance instruction while saving time for teachers. It provides teachers with ready-to-use and customizable lesson presentation slides, complete with all the prompts from the print Teacher Guide embedded in the teacher's view.

Since 2021, Amplify developed a Common Core State Standards (CCSS) version of the digital experience that features CCSS standards at the lesson level and within the Teacher Guide PDFs. Furthermore, the CCSS version of the CKLA digital experience includes several planning documents, such as the CCSS versions of the Teacher Planners, Writing and Speaking Rubrics, and Alignment Charts that are not available in the currently listed version of the digital experience.

Thank you for your consideration of Amplify's substitution request. We look forward to any questions you may have and the outcome of your review.

Sincerely,

Melissa Ulan
Executive Vice President, Literacy
Amplify Education

<p>SUBJECT: Substitution Requests for Instructional Materials (Amplify), OAR 581-011-0086</p> <p>STAFF NAME & OFFICE:</p> <p>The publisher Amplify has requested substitution for the current edition of <i>Core Knowledge Language Arts (CKLA)</i>, which was adopted by the State Board of Education in 2021. Substituted materials will be supplied to Oregon schools at the contract price of the originally adopted edition unless the price for the substituted version’s price is lower than the 2020 contract price. The updated materials have been reviewed by OTLA's Language Arts Education Specialist, Tina Roberts, who has confirmed the change to be an appropriate update.</p> <p><input type="checkbox"/> New Rule <input type="checkbox"/> Amend Existing Rule <input type="checkbox"/> Repeal Rule</p>	<p><input type="checkbox"/> First Reading <input type="checkbox"/> Presentation <input type="checkbox"/> No Presentation</p> <p><input checked="" type="checkbox"/> Action <input type="checkbox"/> Temp Rule <input type="checkbox"/> Presentation <input checked="" type="checkbox"/> No Presentation</p>
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BACKGROUND

The State Board of Education adopted the universal version of Amplify’s *Core Knowledge Language Arts* (CKLA) as a recommended instructional resource for English Language Arts in October 2021. Since 2021, Amplify developed a Common Core State Standards (CCSS) version of their digital materials that features CCSS ELA standards at the lesson level and within the Teacher Guides. According to the publisher, districts around Oregon have expressed interest in having access to this CCSS version of the CKLA digital experience. The CCSS version meets the ELA adoption criteria set by the State Board of Education in 2020. Updates include differences in standards coding, as well as the inclusion of several planning documents, such as the CCSS versions of the Teacher Planners, Writing and Speaking Rubrics, and Alignment Charts that are not available in the currently listed version of the digital experience.

Tina Roberts, ODE’s Language Arts Education Specialist, has completed a review of the materials to confirm that they are an appropriate update. Districts would now be able to purchase the updated version of *Core Knowledge Language Arts* for a contract price through Northwest Textbook Depository without conducting a formal independent adoption.

The State Board of Education has the discretion to approve the substitution for *Core Knowledge Language Arts* or decline Amplify’s request to substitute the materials from the universal edition to the CCSS edition. We are recommending that the State Board of Education approve adding the new edition of *Core Knowledge Language Arts* to the list of recommended ELA instructional materials. If approved, both editions of the materials (the universal version and the CCSS edition) would be available for districts.

SUMMARY OF PREVIOUS BOARD ACTION

The Board has approved similar substitution requests under OAR [581-011-0086](#), including a substitution request for English Language Proficiency materials in Spring of 2024, and for English Language Arts instructional materials in September of 2023.

HAS THE RULE CHANGED SINCE LAST BOARD MEETING?

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

POLICY ISSUE OR CONCERNS

This approval will allow districts to purchase the CCSS edition of *Core Knowledge Language Arts* for a stable contract price, guaranteed through January 2028, without conducting a formal independent adoption. Independent adoptions require districts to invest resources (time, labor, funds) in order to purchase and implement the materials. Since ODE has already reviewed the materials and confirmed they are aligned to current ELA standards in Oregon, districts who choose to use *Core Knowledge Language Arts* will be positively impacted. The update to the ELA adopted materials list will allow access to updated materials while maintaining the current contract price. ODE has considered unintended consequences, and ODE does not have reservations about the approval of this addition to the ELA Instructional Materials list.

EQUITY IMPACT ANALYSIS

Districts who serve historically underserved populations will now have access to the CCSS edition of *Core Knowledge Language Arts* for the same price as the currently recommended edition. Approving this substitution request will help to ensure that Oregon students in districts that use Amplify get equitable access to materials.

FISCAL ANALYSIS

The proposed update to *Core Knowledge Language Arts* is fiscally beneficial to districts. Allowing the material to be officially updated gives districts the opportunity to purchase the CCSS edition for the same contract price of the universal edition. This will ultimately lead to cost savings for districts that want to use the CCSS edition.

EFFECT OF A “YES” OR “NO” VOTE

A “YES” vote would allow ODE to substitute the Common Core State Standards version of *CKLA* on the ELA instructional materials list for the remainder of the contract period (through January 2028).

A “NO” vote would deny the publisher’s request to substitute the Common Core State Standards version of *CKLA* on the adopted ELA instructional materials list.

STAFF RECOMMENDATION

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

ATTACHMENTS

Attachment 1: Amplify Substitution Request

Criteria for the Review and Adoption of Instructional Materials for:

Categories 1-6: Oregon Social Sciences– Grades K-5, 6-8, and 9-12 History, 9-12 Civics and Government, 9-12 Geography, 9-12 Economics

Legal Requirements Section

1. **Basal Instructional Materials Requirement**

The submitted materials must make up an organized system of instruction that provides opportunities for teaching the 2024 Social Science Standards, including the Essential Disciplinary Practices.

Does the program meet the above requirements for basal instructional materials?

Yes No

2. **Nondiscriminatory Requirement**

Submitted materials must provide models, selections, activities and opportunities for responses, which promote respect for all people described in ORS 659.850 and OAR 581-021-0045; materials must support program compliance standards described in OAR 581-021-0046.

Does the program meet the above nondiscrimination requirements?

Yes No

15

3. **National Instructional Materials Accessibility Standard (NIMAS)**

Submitted materials must include assurance from the publishers that they agree to comply with the most current NIMAS specifications regarding accessible instructional materials. NIMAS files must be submitted to the National Instructional Materials Access Center (NIMAC) by February 1, 2026.

Does the program meet the above requirements for NIMAS?

Yes No

4. **Digital Manufacturing Standards and Specifications for Textbooks (MSST Form B and M):**

Submitted materials must include assurance from the publishers agreeing to comply with the most current manufacturing standards and specifications (MSST Form B and M).

Does the program meet the above MSST requirements?

Yes No

Part 1: Oregon Social Science Baseline Criteria [K-HS]

Criterion	Description	Metric 1	Metric 2	Metric 3	Metric 4
Criterion 1.1 Alignment to Standards	Description: Materials incorporate the majority of grade-/course-level standards in a way that promotes rigor and depth of learning	<p>COMPREHENSIVE</p> <p>Materials address a significant majority of the grade-/course-level standards and promote the ability of educators to teach a more complete history, integrating the diverse perspectives and contributions of traditionally underrepresented groups.</p>	<p>DEPTH OF CONTENT</p> <p>Materials encourage a deep understanding of Domain Concepts*. Materials encourage student engagement with complex texts, problems, or scenarios that require critical thinking and analytical skills aligned with grade-level expectations.</p> <p>*See page 5 of 2024 Oregon Social Science Standards</p>	<p>SOCIAL SCIENCE PRACTICES</p> <p>Materials seamlessly integrate the Essential Disciplinary Practices* through regular and authentic engagement opportunities. Students have multiple relevant opportunities to apply learned content and skills demonstrating the interconnectedness of the standards.</p> <p>*See page 6 of 2024 Oregon Social Science Standards</p>	<p>RIGOROUS LEARNING</p> <p>Tasks and assignments are appropriately aligned with grade-level expectations and require students to apply higher-order thinking skills.</p>
Criterion 1.2: Scope and Sequence	Description: Materials present a clear pathway for educators to address the content and skills in a coherent sequence, grounded in the standards	<p>COHERENT DESIGN</p> <p>Materials are organized in a sequence that builds on prior knowledge and increases in complexity throughout the course or grade level. The sequence aligns with the natural progression of concepts and skills outlined in the standards.</p>	<p>CONNECTIONS TO STANDARDS</p> <p>Materials provide transparency in how the sequence aligns with and supports the full range of grade-level standards including connections to previous and future learning.</p>	<p>FLEXIBILITY</p> <p>Materials offer guidance for adapting instruction to different timeframes, learning environments, and/or student needs while maintaining the overall coherence of the sequence. Resources include strategies for addressing prerequisite knowledge or skill gaps and guidance on prioritizing content when necessary.</p>	

16

Criterion	Description	Metric 1	Metric 2	Metric 3	Metric 4
<p>Criterion 1.3: Practice and Skills</p>	<p>Description: Materials align with Oregon’s Essential Disciplinary Practices for social science practices.</p>	<p>INQUIRY & ANALYSIS Materials are organized to provide consistent opportunities for sustained inquiry through questioning, reflection, and analysis of diverse, strategically sequenced sources. Students are encouraged to generate and explore their own questions and understandings.</p>	<p>DISCIPLINARY THINKING & COMMUNICATION Materials offer regular and varied opportunities for students to engage in discipline-specific thinking, reading, writing, listening, speaking, and analyzing. Materials mirror the practices of social science scholars and include various types of sources.</p>	<p>EVIDENCE-BASED REASONING & ARGUMENTATION Materials provide diverse opportunities for students to engage in evidence-based reasoning and discourse, critically evaluate and use evidence from sources, and construct well-supported arguments and conclusions.</p>	<p>APPLICATION & CIVIC ENGAGEMENT The instructional materials foster students' ability to connect their learning to real-world contexts and participate in civic life. They provide opportunities for students to apply their knowledge and skills to address authentic issues at various levels of societies, from local to global, while offering educators the necessary resources to guide this process.</p>
<p>Criterion 1.4 Holocaust and Genocide Education (6-12 History only)</p>	<p>Materials accurately address genocide, the historical origins of antisemitism and key events of the Holocaust.</p>	<p>ANTISEMITISM AND HOLOCAUST Materials explain the historical roots of antisemitism and cover significant events and policies of the Holocaust.</p>	<p>GENOCIDES The content includes comprehensive and accurate historical information on genocide.</p>	<p>PREVENTION AND INTERVENTION Materials discuss modern efforts to prevent genocide, including international laws and organizations.</p>	<p>RESISTANCE AND RESILIENCE Content highlights historical and contemporary examples of resistance and resilience among targeted groups throughout history.</p>

Part 2: Equitable Student Engagement and Cultural Pedagogy Criteria [K-HS]

Criterion	Description	Metric 1	Metric 2	Metric 3	Metric 4
Criterion 2.1: Engagement & Relevance	Materials give opportunities for rigorous, student-driven learning. Materials provide opportunities to connect to relevant topics, provide authentic contexts and experiences, and allow students to explore ideas, interests, and values.	<p>RELEVANCE</p> <p>Materials include culturally relevant and diverse contexts. Materials support the integration of contemporary social issues, connecting grade-level concepts to current contexts.</p>	<p>STUDENT AGENCY AND CHOICE</p> <p>Materials offer multiple pathways for investigation and expression, allowing students to pursue individual interests while meeting learning objectives. Students have opportunities to make meaningful choices about their learning process and demonstration of understanding.</p>	<p>ADAPTABILITY AND EXTENSION</p> <p>Materials include adaptation strategies to differentiate learning for all students. Examples may include extensions to build on prior learning or scaffolds to support students in reaching grade-level content.</p>	
Criterion 2.2: Culturally Responsive Instructional Support	Materials provide equitable inclusion and representation of diverse perspectives and experiences.	<p>REPRESENTATION IN CONTENT</p> <p>Materials include a wide-range of histories, contributions, and perspectives across various aspects of identity including race, ethnicity, gender, ability, socioeconomic status, geographic origin, and religion. Representations are multifaceted avoiding stereotypes and reflecting both historical and contemporary contexts.</p>	<p>MULTIPLE PERSPECTIVES</p> <p>The materials integrate multiple perspectives on historical and contemporary issues, encouraging students to consider global perspectives and international issues, and fostering students' understanding of the interconnected nature of our world. Materials promote critical thinking about diversity, equity, and inclusion as integral parts of the subject matter.</p>	<p>ASSET-BASED</p> <p>Materials empower educators to identify, value, and leverage students' funds of knowledge from their homes and communities as resources.</p>	

Part 3: Technical Usability Criteria [K-HS]

Criterion	Description	Metric 1	Metric 2	Metric 3	Metric 4
Criterion 3.1: Supports for Teachers	The materials include opportunities for teachers to effectively plan and utilize materials with integrity and to further develop their understanding of the content.	<p>SUPPORTING GUIDANCE</p> <p>Materials include detailed teacher guidance providing clear instructional strategies, lesson plans, and pacing suggestions. Rationale for instructional choices, anticipated student responses or misconceptions, and suggestions for differentiation to support diverse learners.</p>	<p>PEDAGOGICAL CONTENT KNOWLEDGE</p> <p>Resources incorporate embedded professional learning opportunities that enhance educators' content knowledge and pedagogical skills including approaches to underrepresented histories.</p>	<p>HOME CONNECTION</p> <p>Materials provide strategies for engaging all partners—including students, families, or caregivers—about the program and suggestions for how they can help support student progress and achievement.</p>	<p>CONTENT EDITABILITY</p> <p>Materials are designed to allow a teacher to differentiate content and vary modes of communication within lessons, tasks, or other activities for students.</p>
Criterion 3.2: Supports for Students	Materials have explicit teacher support with suggestions (routines, strategies, etc.) for how they can meet the needs of individual learners. Support materials include live updates (data sources, current events, etc.).	<p>STRATEGIES FOR SPECIAL POPULATIONS</p> <p>Materials provide scaffolds to support students from special populations in their regular and active participation in social science learning (i.e. students who are multilingual, students experiencing disabilities, and/or students identified as TAG).</p>	<p>EMERGENT BILINGUAL STUDENT SUPPORT</p> <p>Materials provide strategies and support for students who read, write, and/ or speak in a language other than English to enable their full participation in learning.</p>	<p>STUDENT EDITABILITY</p> <p>Materials include resources for students and allow them to show their understanding and comprehension through different modes of expression.</p>	

Criterion	Description	Metric 1	Metric 2	Metric 3	Metric 4
<p>Criterion 3.3: Digital Learning Design Elements</p> <p><small>*This criterion is not required. Quality indicators are provided for evaluation if digital components are present.</small></p>	<p>The materials are attentive to digital design elements specific to structure, support for users, and adaptability of materials.</p>	<p>MATERIALS USABILITY</p> <p>The organizational structure of the digital materials allows for intuitive navigation and meaningful interaction on a variety of devices.</p>	<p>LEARNING RESOURCES</p> <p>The digital materials provide support for users in a variety of settings, including:</p> <ul style="list-style-type: none"> Professional learning resources to support educators’ use of the materials and content. Robust support to help families understand and utilize the materials while supporting their students at home Support for students working independently. Support for emergent bilingual students. Support for students with disabilities. 	<p>MEDIA INTEGRATION</p> <p>Digital and multimedia elements support, rather than distract from, intended learning outcomes and instructional content.</p>	<p>ADAPTABILITY OF MATERIALS</p> <p>Digital materials allow teachers to adjust and adapt documents and resources to meet student needs. (e.g., translating materials, modifying reading levels, downloading capacity, etc.).</p>

Part 4: Assessment Criteria [K-HS]

Criterion	Description	Metric 1	Metric 2	Metric 3	Metric 4
<p>Criterion 4.1: Formative Assessment Process</p>	<p>Materials embed formative assessments throughout units to evaluate student learning progress and inform social science instruction.</p>	<p>MULTIPLE OPPORTUNITIES</p> <p>Materials include diverse and strategically placed formative assessment opportunities throughout each unit. These may include quick writes, exit tickets, discussion prompts, graphic organizers, or short quizzes aligned with lesson objectives and providing ongoing insights into student understanding.</p>	<p>LEARNING RELEVANCY</p> <p>Formative and summative assessments align closely with the unit's learning objectives and build towards summative assessment goals, allowing for timely interventions and adjustments in instruction.</p>	<p>INTERPRETATION OF FEEDBACK</p> <p>Assessment tools provide clear guidance for using a strengths-based approach in interpreting student responses and offer suggestions for targeted feedback. Materials include strategies for using assessment results to inform instruction, such as reteaching suggestions, extension activities, or differentiation options based on student performance.</p>	<p>STUDENT REFLECTION</p> <p>Materials incorporate opportunities for students to assess their own learning and reflect on their progress. This may include self-check questions, peer review activities, or reflective journaling prompts that encourage metacognition and support students in taking ownership of their learning in social science.</p>

Criterion	Description	Metric 1	Metric 2	Metric 3	Metric 4
<p>Criterion 4.2: Summative Assessments</p>	<p>Materials incorporate summative assessments that support students in demonstrating deep knowledge of social science content, concepts, and skill.</p>	<p>ALIGNMENT</p> <p>Materials include performance tasks that are comprehensive, inclusive, and aligned with social science standards including the ten Essential Disciplinary Practices.</p>	<p>VARIETY</p> <p>Materials include multiple assessment formats that cater to different learning styles and allow students to demonstrate their understanding in a variety of ways. This may include verbal or written responses, in-depth projects, presentations, debates, or performance tasks that simulate real-world applications of social science concepts.</p>	<p>AUTHENTICITY</p> <p>Assessments allow students to engage with social science issues and topics relevant to contemporary civic life and democratic discourse.</p>	<p>CLARITY & FEEDBACK</p> <p>Materials include clear scoring criteria while providing structured opportunities for feedback, reflection, and improvement before final submission.</p>
<p>Criterion 4.3: Integrated Assessment System*</p> <p><small>*This criterion is not required. Quality indicators are provided for evaluation if an integrated assessment system is present.</small></p>	<p>Diagnostic, benchmark, and/or interim assessments are integrated into instructional materials in ways that support the learning process. Student results are interpreted relative to the performance expectations of the standards (i.e. criterion-referenced, as demonstrated by student evidence gathered in the learning environment, and recommend instructional next steps.</p>	<p>ASSESSMENT DESIGN</p> <p>Diagnostic assessments are well-designed, rigorous, connected to standards, and offer multiple opportunities and modalities to demonstrate knowledge and/or skills.</p>	<p>DATA QUALITY</p> <p>The assessment system provides clear and actionable data that allow educators to respond to specific student strengths and opportunities for growth.</p>	<p>RESPONSIVENESS</p> <p>The assessment system is connected to resources designed to meet students’ specific opportunities for growth. Intervention and extension materials effectively accelerate student learning. (These resources serve to answer the question, “Now what?”)</p>	<p>FAMILY ENGAGEMENT & COMMUNICATION</p> <p>If the assessment system provides reports and/or diagnostic information to families, those resources are accessible in multiple languages, allowing families to effectively partner with their child(ren) in the learning process.</p>

<p>SUBJECT: Instructional Materials Adoption Criteria for Social Science (OAR 581-011-0065)</p> <p>STAFF NAME & OFFICE: Vanessa Martinez, Jenna Montgomery, and Amit Kobrowski Office of Teaching, Learning, and Assessment</p> <p>Criteria for the selection and adoption of instructional materials for social science were developed by the ODE Social Science Education Specialist, and reviewed and revised by a social science criteria development committee. These criteria are ready to be adopted by the State Board of Education.</p> <p><input type="checkbox"/> New Rule <input type="checkbox"/> Amend Existing Rule <input type="checkbox"/> Repeal Rule</p>	<p><input type="checkbox"/> First Reading <input type="checkbox"/> Presentation <input type="checkbox"/> No Presentation</p> <p><input checked="" type="checkbox"/> Action <input type="checkbox"/> Temp Rule <input type="checkbox"/> Presentation <input type="checkbox"/> No Presentation</p>
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BACKGROUND

The State Board of Education has the responsibility of approving criteria for the evaluation and adoption of submitted instructional materials (OAR 581-011-0065). The most recent contracted period for instructional materials in social science was established for the years 2019-2026. The current social science content standards were adopted by the State Board in June 2024. The next phase in this process is for ODE to develop new adoption criteria to ensure that instructional materials align with the newly revised social science standards and current instructional practices.

In 2021, members of the Standards and Instructional Support Team, along with the Assessment Team and the Office of Equity, Diversity, and Inclusion, developed a foundation for consistent and cohesive criterion across content areas grounded in the ODE Equity Stance. The State Board of Education adopted the criteria framework for implementation in the subsequent mathematics, science, and health instructional materials evaluations.

In October 2024, following the guidelines provided in OAR 581-011-0055, ODE staff convened a committee of K-12 teachers, curriculum specialists, and other content area experts in social science to review, revise, and recommend the adoption criteria for social science instructional materials included as an attachment to this docket. This criteria was developed using ODE’s standardized criteria framework as a guideline, as well as examples from state and national criteria.

The social science adoption criteria require all recommended materials to align with Oregon’s commitment to inclusive social science education. Among the non-negotiable criteria are requirements for materials to address topics identified in recent legislation on underrepresented histories, the Holocaust, genocide, and civics ([HB 2845](#), [HB 2023](#), [HB 2905](#), [SB 664](#), and [SB 702](#)).

Requirements that all materials support teaching inclusive histories are embedded throughout Parts 1 and 2 of the criteria, ensuring alignment with HB 2845, HB 2023, and SB 2905. Metric 1.4.3: Application & Civic Engagement specifically addresses the civics instruction required by SB 702. Additionally, Criteria 1.4 ensures that materials accurately address genocide, the historical origins of antisemitism, and key events of the Holocaust, fulfilling the requirements of SB 664. After consultation and discussion with

external partners on the complexities of addressing genocide and the Holocaust with younger students, criteria 1.4 is limited to instructional materials in grades 6-12.

The committee supports the draft adoption criteria for social science instructional materials. Upon adoption by the State Board, this criteria will guide the creation of the evaluation tool for identifying quality K-12 social science instructional materials.

SUMMARY OF PREVIOUS BOARD ACTION

The last criteria was presented in 2017. This is the second read for the updated criteria.

HAS THE RULE CHANGED SINCE LAST BOARD MEETING?

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

POLICY ISSUE OR CONCERNS

There are no known policy questions raised due to this request.

EQUITY IMPACT ANALYSIS

The review and revision of the instructional materials adoption criteria is an opportunity to set a clear vision for equitable and high quality social science teaching and learning in grades K-12.

The 2024 Social Science Standards require students to explore diverse perspectives, discourses, and rich counternarratives, emphasizing the range of ethnic and historical perspectives that shape our society. For students from historically and currently underrepresented communities, encountering these perspectives in the classroom can resonate with their lived experiences, fostering a sense of belonging and inclusion. Research consistently shows that culturally responsive classrooms, where students feel valued and connected, contribute to improved learning outcomes.

The updated instructional materials review criteria reinforce this commitment to inclusive education by requiring materials to be aligned to the adopted more inclusive social science standards. Materials recommended for adoption also must meet the non-negotiable Part 2 criteria, *Equitable Student Engagement and Cultural Pedagogy* identified for all recent content area adoptions

These criteria require that all materials support student-driven learning through asset-based, culturally responsive instruction. By articulating the baseline standard for high quality materials, the updated criteria establishes a foundation for fostering an educational environment where students see their identities, cultures, and histories valued, advancing a more equitable and inclusive learning experience for every Oregon student.

FISCAL ANALYSIS

High-quality instructional materials can significantly improve student learning outcomes, often rivaling or exceeding the impact of more costly interventions. However, for districts facing deep fiscal cuts or delays in adoption cycles, the cost of purchasing these materials can pose a significant challenge.

EFFECT OF A “YES” OR “NO” VOTE

A “yes” vote will provide the Oregon Department of Education and Oregon school districts with criteria for the evaluation and adoption of social science instructional materials that are aligned to the newly revised social science standards.

A “no” vote will mean that the Oregon Department of Education and school districts will use previously approved adoption criteria from 2018 for social science instructional materials. This will result in evaluation of instructional materials using outdated criteria and standards.

STAFF RECOMMENDATION

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

ATTACHMENTS

Attachment 1: Adoption Criteria for K-12 Social Science Instructional Materials

Summary

Meeting Date: 1/16/2025

Title: Technical Fix: Intensive Program Temporary Rules

Status: Adoption (no changes)

Presentation: No (Written Report Only/Consent)

Key Staff: Haedon Brunelle, Tim Boyd, Sarah Dey, Chelsea Mabie

Topic Summary: Due to a clerical filing notice error, rules relating to the Intensive Program Rules need to return for a temporary vote for adoption at the January 16, 2025, State Board meeting. These rules initially passed on December 5th, 2024, but cannot be filed for adoption as the error didn't provide the required 51-day filing notice. These proposed rules are returning to the Board as a temporary rule for districts to access as soon as possible, and to serve as a 1st reading for the Board, so that a 2nd reading may be held for permanent adoption in February.

ODE Education Equity

Stance

Education equity is the equitable implementation of policy, practices, procedures, and legislation that translates into resource allocation, education rigor, and opportunities for historically and currently marginalized youth, students, and families including civil rights protected classes. This means the restructuring and dismantling of systems and institutions that create the dichotomy of beneficiaries and the oppressed and marginalized.

BACKGROUND AND NEED

Members of the State Board of Education are volunteers, with unique professional and lived experiences. Using plain language, this section should provide context for this item, including any needed overviews of relevant programs or initiatives.

1. Briefly, how does this topic, program, or initiative currently operate? Where is it located within Oregon's school systems? How does it ultimately serve students?

The Intensive Program provides funding and support to the districts with the highest needs. Districts are selected through a combination of student outcomes and student demographic data. Currently, the program has four participating districts and will invite additional districts in early 2025. The anticipated start date for this newest cohort is July 1, 2025.

Designed as a collaborative partnership model between the district and ODE, the Intensive Program provides a systems approach through the following:

- **Student Success Team:** The Student Success Team works collaboratively with district staff, ODE staff, community members, contracted stewards, and others to make binding recommendations to improve district practice, funding, and outcomes.
- **Stewards:** Each district is assigned three stewards who bring external perspectives and deep knowledge and skills in the focal areas of leadership, teaching and learning, and community engagement. Stewards work to build trust and leverage dispositions of

transformational leaders in order to attend both to climate and culture challenges as well as instructional practices.

- **ODE Internal Alignment:** Staff from across the Agency meet regularly to support Intensive Program districts in an effort to examine ways to reduce burden, align processes, and reexamine policy to dismantle systems that are detrimental to student and district success.

The Stewarding Body formally approves recommendations which have been vetted by the Advisory Body. Districts must accept and implement any recommendations connected to grant-in-aid associated with the program, as well as Student Investment Account monies. Recommendations are specific to district system needs; recommendations from current districts range from starting new CTE pathways to district community engagement assessments. Current impacts of recommendations can be felt from the classroom level (e.g. infusing educational assistants to support early literacy initiatives), to the building level (e.g. hiring Climate and Culture TOSAs at each elementary school to support building a positive climate and culture), to district levels (e.g. reviewing assessments and audits to support reflection on current systems).

2. Please list the specific rule(s), statute(s), or recently passed legislation that allows the Board to take action on this item. Where are they prescriptive and where do they provide the Board and Department flexibility?

ORS 327.222– Student Investment Account, Intensive Program. Statute provides an outline for the Intensive Program, but ODE staff do not anticipate any key decision points in these proposed rule changes to conflict with statute.

OAR 581-017-0732 through 0744 – Intensive Program rules

3. Has this item come before the Board before? If so, when did the Board last take action, and what was that action?

The Intensive Program ruleset was initially adopted by the State Board of Education on January 28, 2021. Out of the proposed changes, only the one related to collaboration and coordination funds has been the focus of additional rulemaking. The proposed rule changes would move collaboration and coordination funds from being a portion of the district’s initial allocation to additional funding that all districts receive. Additional funding will particularly support small districts whose program allocation is limited.

- 9/22/21- State Board adopted temporary rules allowing collaboration and coordination funds to support implementation of the program.
- 3/25/22- State Board adopted the same rules as permanent.
- 6/23/22- State Board adopted a minor language change related to collaboration and coordination funds, specifying that they would be used during the planning phase of the program.

Oregon State Board of Education Docket



4. Why is this item coming before the Board now?

While the State Board of Education approved these rules at the December 5, 2024, State Board of Education meeting, these rules could not be filed for adoption as a filing notice occurred. Meaning these rules did not issue a 51-day notice through the Secretary of State’s Office as required by law, and therefore could not be filed for permanent adoption. This item is returning to the State Board of Education as a temporary rule, and as a 1st read for permanent adoption in February, as the rules have now received a rule notice. Below is language from the December docket for this ruleset:

The Intensive Program is at a key moment in implementation. Our first participating district is just over halfway through their four year partnership. This district will begin examining exit criteria and what continued support could look like in the spring of this school year. Current rules outline how improvement is measured, with both participating districts as well as districts that have declined invitation, requesting additional clarity in this area. Since implementation began, the Agency has moved forward the Aligning for Student Success Integrated Plan. The Student Investment Account is a key component of the Integrated Application, so finding ways to align implementation and rule to reduce burden for districts is a pillar the Intensive Program wants to uphold. Updating exit criteria, as well as definitions, to align with the Integrated Application ahead of the first district exiting the program has provided the urgency to come to the Board now. In addition, the team is preparing to invite the next round of districts in early 2025. Having rule sets that incorporate the needed shifts from what the program has learned with the first two cohorts of districts, as well as providing greater clarity around how improvement is measured, feel essential in helping invited districts have the greatest clarity around the program they are considering opting into.

5. Who requested or brought about the need for this item? (Select all that apply.)

- ODE Staff
- Students
- Families
- Community-Based Organizations
- Culturally Specific Organizations
- School Districts
- Education Service Districts
- Charter Schools
- Oregon State Legislature
- Educational Associations
- Racial Justice Council
- Federal Government
- One or more of Oregon’s nine federally recognized tribes: _____
- Other: _____

ENGAGEMENT STRATEGY AND LEARNINGS

The State Board of Education expects all items that come before it be reviewed and influenced, to the greatest extent possible, by a robust community engagement process. Using plain language, this section should provide an overview of the role that engagement played in this item, including with Oregon's nine federally recognized Tribes, other state agencies, and external partners.

6. How did the [Equity Decision Tree](#) inform your office/team engagement strategy? Who is most likely to be affected and how have they been intentionally incorporated into the engagement process for this item?

From the Equity Decision Tree, one of the most important questions that we considered as we planned our engagement around the proposed rule changes was how to solicit feedback in a way that builds relationships and creates a deeper sense of community. We knew that participating and invited districts were most likely to be affected as well as tribal communities in at least one participating district. We intentionally incorporated these districts as well as the Office of Indian Education in multiple rounds of engagement and ensured that their feedback was fully integrated into the proposed changes.

7. After consulting with ODE's Rules Coordinator and the Office of Indian Education, did this item require Tribal Consultation and/or Tribal Communication with Oregon's nine federally recognized tribes? (For more information, please reference ODE's [Tribal Consultation Toolkit](#).)

- No
 Yes – Both Consultation and Communication.
 Yes – Only Communication.

8. Has your office/team considered how this item intersects with the authority of other state entities that serve the health and education needs of Oregon's students, or otherwise contribute to the climate of Oregon's school systems? If so, please select from the below list.

- N/A; this item does not intersect with other state entities.
 Oregon Health Authority (OHA)
 Department of Early Learning and Care (DELIC; formerly ELD)
 Educator Advancement Council (EAC)
 Higher Education Coordinating Commission (HECC)
 Youth Development Oregon (YDO)
 Teacher Standards and Practices Commission (TSPC)
 Oregon Housing and Community Services (OHCS)
 Other: _____

9. Which geographic perspectives are intentionally represented in your office/team engagement strategy?

- Northeast Oregon

Oregon State Board of Education Docket



- Central and Southeast Oregon
- Southwest Oregon
- Willamette Valley and Central Coast
- Northwest Oregon
- Tribal lands
- Other: _____

Why did your office/team focus on the above geographical perspective(s)?

10. Please highlight some of the key pieces of feedback your office/team received during the engagement process. How did this feedback influence the development of this item? How were differences in opinion accounted for?

The Intensive Program did multiple rounds of engagement with staff within the Office of Education Innovation and Improvement, the Office of Indian Education, the ORCA (early concept and first read), and with participating districts and steward contractors. During these engagement sessions with partners, common trends in feedback emerged:

- Strong support to allow continued participation beyond the statutorily required four years for districts, without a pause.
- A need to clarify how improvement will be measured and named in rule.
- Strong support for providing funding specifically for collaboration and coordination to strengthen implementation, especially in small districts.
- A need to refine definitions, and make small edits, to provide greater clarity for both participating districts as well as those invited.

The consistency in feedback helped prioritize areas of rules to refine as well as which areas of current rule sets needed greater clarity.

11. Please describe any additional engagement opportunities your office/team will be pursuing prior to asking the Board to take action on this item.

The team returned to the ORCA for a second read. ODE’s Rules Coordinator will update the ORCA on the filing error, temporary rule status, and new plan to pass these rules. No additional engagement opportunities are anticipated at this time.

FISCAL AND ADMINISTRATIVE IMPACT ANALYSIS

Equitable resource allocation is a critical component of education equity. Using plain language, this section should describe the fiscal, administrative, and small business impacts of this item, and how it affects the larger social system that serves Oregon’s students.

12. After consulting with ODE’s Rules Coordinator and Grant Consolidation Team, was this item identified as a grant-related item?

- No
- Yes; please review Appendix B: Grant Consolidation below.

13. Will Board action create fiscal or administrative impacts on districts, ESDs, community-based organizations, and/or the nine federally recognized tribes? If so, please describe the anticipated short- and long-term effects and how they may be felt differently in small, rural, or remote communities.

Proposed Change: Collaboration and Coordination Funds: We anticipate that this change, which moves collaboration and coordination funds from a percentage of the district's initial allocation to additional funding, will have a positive fiscal impact on districts, especially small districts whose grant funds were significantly reduced by collaboration and coordination expenses.

Proposed Change: Aligning Tribal Consultation with Current Requirements: The Office of Indian Education requested that we align tribal consultation requirements for participating districts with existing ESSA requirements with the intention of reducing fiscal and administrative burden on tribes and districts.

14. Will Board action create a fiscal or administrative impact on state agencies, units of local government, and/or the public? Will it increase costs associated with compliance for small businesses?

ODE staff do not anticipate a fiscal or administrative impact on any of these entities, including small businesses.

EQUITY IMPACT ANALYSIS

The State Board of Education envisions an aspirational education system that honors its increasingly diverse student body and affirms every student to reach their full potential in a rapidly shifting global environment. Using plain language, this section should describe the impact of this item on students and the larger social system that serves their health and education needs.

15. How will Board action on this item ultimately impact students and their families, particularly those who have been and continue to be systemically marginalized?

Proposed Change: Collaboration and Coordination Funds: We anticipate that this change will have an outsized importance for small and rural school districts whose limited funding can be a barrier to supporting students and their families, especially those who are systemically marginalized.

Proposed Change: Aligning Tribal Consultation with Current Requirements: The intent of this proposed change to the program's approach to tribal consultation is to lessen the burden and deepen the engagement for both tribes and participating districts in order to allow both entities to better serve students and families.

Oregon State Board of Education Docket



Proposed Change: Exit Criteria: The Integrated Application hones in on four key goals and outcomes around them. By aligning exit criteria to those in the district’s Integrated Application, we’re both directing the district to focus on what we believe will support students and families, especially those who are systemically marginalized, as well as alleviating the burden of districts’ addressing multiple sets of outcomes.

16. How will Board action on this item ultimately impact school district employees and volunteers, particularly those who have been and continue to be systemically marginalized?

We anticipate that these proposed changes will result in less administrative burden and more fiscal resources to support school districts and their employees.

17. What are the anticipated short- and long-term consequences of Board action on this item? Will Board action have a cumulative effect on students, families, educators, districts, or Oregon’s school systems?

ODE staff anticipate minimal short term impacts with the most significant being that participating districts will receive additional funds to support collaboration and coordination.

ODE staff anticipate more significant long-term impacts including: reduced administrative burden for participating districts and tribes through aligned requirements and exit criteria, strengthened collaboration and coordination between participating districts and the Department through the additional funds, and, ideally, stronger district, community, and student outcomes as a result of these changes.

18. What are the anticipated short- and long-term consequences of inaction on this item and who would experience those consequences?

If the proposed changes are not adopted, the Intensive Program will likely have a more limited impact on participating districts and communities by duplicative requirements, processes, and outcomes and limited funding to support collaboration and coordination.

RECOMMENDED ACTION

The State Board of Education has dedicated itself to challenging the status quo and sharing responsibility for every student’s academic and lifelong success. Using plain language, this section should describe the choice before the Board, the Department’s recommendation, and any other relevant information.

19. Please provide a brief summary of the specific language your office/team is bringing to the Board. Are there any key decisions within this language that your office/team would like the Board to make?

Proposed Change: Collaboration and Coordination Funds: ODE staff drafted language to allow for collaboration and coordination funds, if there are available programmatic funds. Also, the

Oregon State Board of Education Docket



language specifies that these funds— and only these funds— are not required to be approved as a recommendation by the Stewarding Body.

Proposed Change: Aligning Tribal Consultation with Current Requirements: ODE staff consulted OIE on this language and copied the language related to tribal consultation requirements in other areas of rule.

Proposed Change: Refining and Aligning Exit Criteria: ODE staff reordered the existing exit criteria to prioritize the outcomes in the district’s Aligning for Student Success integrated plan and provided more specifics across all criteria.

Proposed Change: Allowing Districts to Participate Beyond Four Years: Current rule restates statute: districts must remain in the program for a minimum of four years. ODE staff proposed changing the rule to allow a participating district’s Student Success Team to request staying in the program until the end of the fiscal biennium if the district has not yet demonstrated improvement. This would allow the district, if needed, to be reinvited into the next cohort at the end of the current biennium and ensure that support was continuous.

Proposed Change: Minor and Conforming Edits: Additional edits include minor language changes to definitions and requiring districts to identify a district point person.

20. How is this language responsive to identified needs and/or feedback received through the engagement process? How is it in alignment with [the Board’s Mission, Vision, and Values](#)?

Discussions with and among participating districts, invited districts, OIE, and Intensive Program staff spurred these proposed rule changes which are deeply aligned to the Board’s equity-oriented mission, vision, and values. After multiple years of implementation, ODE staff recognized a need to adapt and innovate the current program to be more responsive to district needs, especially those serving systemically marginalized students and families. Engagement has reiterated these needs, and the proposed rule changes speak to the iterative and innovative nature of the program adjusting to current needs of districts in real-time.

21. Please describe the action your office/team is recommending to the Board (for example, the adoption of rules or the approval of a waiver) and how it reflects the Department’s commitment to academic excellence, belonging and wellness, and reimagining accountability.

Following the second reading of these proposed rule changes, ODE staff recommend adoption of this item. One of the Department’s key priorities is reimagining accountability, and the Intensive Program— and specifically these proposed changes— are deeply in alignment with the vision of this work: a vision that centers shared accountability for the success of students and families.

Oregon State Board of Education Docket



22. Please note any additional support the Department is (or will be) providing to ensure successful implementation of this item.

- N/A; this item does not require any additional support.
- Communications plan
- Technical assistance, professional development, and/or coaching
- Direct or differentiated support for small, rural, or remote school districts
- Corrective Action Processes
- Safety measures
- Organizational culture or practice changes (change management)
- Materials and/or supplies
- Guidance and/or supplemental resources
- Other: _____

23. Has this item changed since the last Board meeting?

- N/A; this item has not previously been before the Board
- No; same as last month
- Yes; please review Appendix A: Second Reading below.

APPENDIX A: SECOND READING

Appendix A should only be completed if “yes” is selected for question 23. Using plain language, this section should provide a summary of any additional engagements, learnings, or changes that have occurred since the First Reading of this item.

1. Please describe any additional engagement opportunities your office/team has pursued since the First Reading of this item. Which perspectives were intentionally included?

Since the First Reading of this item, we presented to the ORCA on November 7th. We did not receive any additional feedback.

2. Has your office/team received any additional public comment on this item? If so, who provided that comment and what feedback did they provide?

No.

3. Please describe any overall learnings that have occurred since the First Reading of this item. How were differences in opinion accounted for?

We have not received any new learnings, but the Intensive Program staff have heard repeatedly from participating districts who are eager for news of the passed rules.

Oregon State Board of Education Docket



4. Please provide a brief summary of the changes your office/team have made to this item since the First Reading. How are these changes responsive to identified needs and/or feedback received through the engagement process?

N/A

APPENDIX B: GRANT CONSOLIDATION

Appendix B should only be completed if "yes" is selected for question 12. Using plain language, this section should provide additional detail on how grant rules have been aligned and designed to support districts and meet administrative needs.

1. Please indicate which of the following underlying processes are required for this grant program.

- Conduct a needs assessment
- Gather and provide additional data
- Submit an application to ODE
- Submit a report to ODE
- Submit a plan to ODE
- Submit a budget to ODE
- Conduct community engagement
- Other: _____

2. How has your team/office worked to encourage more equitable resource allocation and address administrative impacts, particularly for small or rural school districts? How has this grant been aligned with existing grant programs?

Updates to 581-017-0738 Intensive Program & Student Success Teams: Criteria, Agreement and Establishing Improvement are specifically intended to address administrative impacts for districts. Namely, the focus on how schools demonstrate improvement (exit criteria) proposed language is aligned with processes and tools required in the Aligning with Student Success Application. The intention is for districts to incorporate the work they are already undertaking for that application into the Student Success Team as a means to demonstrate progress for the Intensive Program.

The inclusion of coordination and collaboration funds will positively impact all districts during implementation but will be especially helpful for small or rural participants. Currently, our smallest district is setting aside nearly a quarter of their grant-in-aid to support implementation work through staffing a District Point Person. By freeing up specific funds to support implementation, more grant-in-aid can be used to support initiatives in these districts that support students and community

3. How are the grant requirements differentiated for small and rural school districts?

Oregon State Board of Education Docket



The Intensive Program rules currently include floor funding for grant-in-aid for the smallest districts since the amount of funds they would receive per their ADMw calculation would be very limited. As mentioned above, the shift in coordination and collaboration funding for implementation is particularly important for supporting small and rural districts. Beyond funding amounts, grant agreements are the same for small or rural schools as larger districts. However, implementation for each district is specific to their context. For example, the advisory body size is adjusted and right sized for the district size.

PROPOSED RULE REVISIONS—September 5, 2024

581-017-0729

Intensive Program & Student Success Teams: Definitions

The following definitions apply to OAR 581-017-0729 to 581-017-0744:

(1) “Advisory ~~Members~~Body” means the entity which may include the following members: Education Service District staff, additional Department staff, district contracted personnel, additional district educators (principals, teachers and paraprofessionals), students, ~~and~~ family, caregivers, and community members as defined by OAR 581-017-0729 (X).

(X) “Collaboration and Coordination” means activities and expenses that help the participating school district and the Department coordinate the program.

(X) “Community Member” means:

(a) a representative of a community-based organization, as defined by OAR 581-017-0550, that serves the local community;

(b) a representative of a culturally specific organization, as defined by OAR 581-017-0550, that serves the local community;

(c) a representation of an organization that regularly partners with the school district to network resources and assist students in meeting state and local standards, and prepare students for post high school transitions;

(d) a resident of the local community capable of representing underserved community voices, as defined by OAR 581-017-0550, or

(e) a resident of the local community capable of representing community voice, as defined by OAR 581-017-0550.

(2) “Community Steward” means the person designated by the Department who, among other things, brings expertise and experience in developing relational and operational community agreements aimed at fostering shared accountability for changing practice, policy and experiences.

(3) “Department” means the “Oregon Department of Education”.

(X) “District Point Person” means the designated school district employee who will support implementation of the program for the participating school district.

(4) “Focal Student Group” means the specific groups of students outlined in ORS 327.180(2)(b).

(5) “Initial Allocation” means the formula allocation developed for a participating school district for the first year of the program.

(6) “Leadership Steward” means the person designated by the Department who, among other things, brings expertise and experience in transformational education leadership aimed at dismantling structures of systemic oppression.

(7) “ODE Point Person” means the designated, full-time Department employee who will serve on the Student Success Team.

~~(8) “Planning Phase” means the period of time dedicated to establish the Student Success Team.~~

~~(9) “Public Charter Schools” means an elementary or secondary school offering a comprehensive instructional program operating under a written agreement entered into between a sponsor and an applicant and operating pursuant to ORS 338.~~

(10) “School Districts” means an Oregon common school district, joint school district, or union high school district.

~~(11) “Sovereign Nation” means designated representation from one of Oregon’s nine Federally recognized Native American tribes.~~

(12) “Stewarding MembersBody” are is the decision-making entity of the Student Success Team which must include the following members: the ODE point person, the Leadership Steward, the Teaching and Learning Steward, the Community Steward, the district superintendent, a school board member or community member, and a classroom teacher.

(13) “Student Success Team” includes both the Stewarding Body and Advisory Body~~means the group of Stewarding Members and the group of Advisory Members.~~

(14) “Teaching and Learning Steward” means the person designated by the Department who, among other things, brings deep knowledge and expertise in culturally responsive, sustaining and inclusive instructional practices.

(15) “Total Allocation” means the ~~four-year~~ total grant-in-aid distributed to a participating district over their participation in the program given available funds. factoring in available funds for the entire program and participating districts.

581-017-0732

Intensive Program & Student Success Teams: Purpose

(1) The purpose of the intensive program is to assist school districts with the highest needs.

(2) For the purpose of assisting school districts participating in the intensive program, a Leadership Steward, a Teaching and Learning Steward, and a Community Steward will work with local personnel as part of the Stewarding MembersBody of the Student Success Team.

581-017-0735

Intensive Program & Student Success Teams: Eligibility

(1) The Department will review district demographic data and student outcome data to determine which school districts are most in need of additional support in the form of Student Success Teams. Districts who fall into the bottom quartile of the index will be eligible for invitation.

(2) The Department will develop a list of eligible districts once per biennium.

~~(3) Public Charter Schools are not eligible to participate or receive funding.~~

581-017-0738

Intensive Program & Student Success Teams: Criteria, Agreement and Establishing Improvement

(1) The department will prioritize districts with the greatest need as determined by a review of data. ~~Districts with the highest need will receive priority.~~ Given available resources, the department will determine the number of districts to include in the program.

(2) The Department will invite a minimum of three school districts and no more than 10 districts per biennium.

(3) Acceptance of the invitation requires:

(a) ~~Participation in the program for a minimum of four years;~~

~~(x) Execution of a grant agreement to receive grant-in-aid:~~

~~(A) Grant-in-aid will continue until June 30th of the participating district's final school year of program participation; Four-year participation in the program that starts with the execution of grant agreements for additional funding; and~~

~~(x) Including the Intensive Program into district requirements to engage in Tribal Consultation with Tribal Nations, for affected districts under Section 8538 of the Every Student Succeeds Act;~~

~~(x) Commitment to scheduling and supporting regular Student Success Team meetings;~~

~~(x) Ensuring that the decision-making process of the Stewarding Body centers students' perspectives, including represented focal student groups, as appropriate given the district's demographics.~~

~~(b) Commitment to membership and representation on the Student Success Team, whether by formal participation or through consultation, the experiences of the following perspectives, where applicable, must be included in decision-making considerations by the group of Stewarding Members:~~

~~—— (A) Focal student groups~~

~~—— (B) General student body~~

~~—— (C) Sovereign nation leadership~~

~~(x) Identifying a District Point Person to support the Intensive Program within the district for each year of participation;~~

(c) Acceptance and implementation of the recommendations of the Student Success Team pursuant to terms outlined in ORS 327.222.

(4) At the end of the fourth year of participation, four years, participating school districts will have demonstrated improvement when:

(a) The Student Success Team determines the district has made progress in achieving the stated outcomes outlined in the district's Aligning for Student Success integrated plan;

(b) A needs assessment, including community engagement, indicates that sufficient progress has been made;

(c) The school board and Student Success Team have established a sustainability plan to maintain and build on the progress and improvements made; and

(d) Student outcome data has improved since initial identification as measured by:

(A) Initial eligibility data; or

(B) The district is on-track to meet their longitudinal performance growth targets outlined in their Student Investment Account grant agreement.

(5) Whether a participating district has demonstrated improvement will be determined by a progress monitoring tool created by the Department using the criteria outlined in OAR-581-017-0738 (4).

(6) At the end of the fourth school year of participation, the Student Success Team may request that the district remain in the Intensive Program until the completion of the current fiscal biennium if the district has not yet demonstrated improvement.

~~(a) Student outcome data has improved to a point where the district would not be eligible for the program; and~~

~~—(b) The Student Success Team determines the district has made progress in achieving the stated goals; and~~

~~—(c) A community assessment indicates that sufficient progress has been made; and~~

~~—(d) The school board and success teams have established a sustainability plan to preserve the progress and improvements made.~~

581-017-0741

Intensive Program & Student Success Teams: Funding

(1) The Initial Allocation will be determined as follows:

(a) Available funds will be distributed at a rate of \$300 / ADMw.

(b) The maximum allocation a district will receive will not exceed \$5,000,000.

(c) The minimum allocation a district will receive will not fall below \$500,000.

(2) The Total Allocation for the four years will be determined using a tapered distribution over the course of four years.

(3) Additional funding for subsequent years of participation will be determined based on the district's need to sustain existing initiatives and the available grant-in-aid funds available for the program.

(4) The Department will provide additional funds to each participating district on an annual basis to support collaboration and coordination of the program at the district level.

(a) The Department will determine additional funding to participating districts only if there are available programmatic funds;

(b) Each district's funding allocations will be based on a calculation determined by the Department;

(c) These funds are part of the participating district's Total Allocation;

(d) These funds will be available for the duration of the district's participation in the program;

(e) The participating district shall ensure that these funds are spent in accordance with federal and state law as well as Department guidance to support collaboration and coordination; and

(f) These funds are not required to be approved as a formal recommendation by the Stewarding Body.

~~(3) A portion of the Initial Allocation of at least \$50,000 but not to exceed 5% of the participating district's Initial Allocation may be used to support coordination and collaboration in the Planning Phase between The Department and the participating district.~~

~~(54) With the exception of the collaboration and coordination funds referenced in 581-017-0741(3), all remaining funds will be spent in accordance with recommendations from the Student Success Teams, including whether or not to sustain the expenditures for coordination and collaboration in subsequent years of participation.~~

581-017-0744

Intensive Program & Student Success Teams: Reporting

Participating school districts must provide reports in the manner and form required by the Department and in accordance with ORS 327.222.

Summary

Meeting Date: 1/16/2025

Title: HB 4137: International Baccalaureate and Oregon Diploma

Status: Second Reading/Adoption (no changes)

Presentation: Yes

Key Staff: Kristidel McGregor

Topic Summary: House Bill 4137 passed in the 2024 legislative session. The bill directs ODE to create rules defining how a student who has satisfied the requirements of either the IB Diploma Programme or the IB Career-related Programme will also be considered to have satisfied the requirements for an Oregon Diploma.

ODE Education Equity

Stance

Education equity is the equitable implementation of policy, practices, procedures, and legislation that translates into resource allocation, education rigor, and opportunities for historically and currently marginalized youth, students, and families including civil rights protected classes. This means the restructuring and dismantling of systems and institutions that create the dichotomy of beneficiaries and the oppressed and marginalized.

BACKGROUND AND NEED

Members of the State Board of Education are volunteers, with unique professional and lived experiences. Using plain language, this section should provide context for this item, including any needed overviews of relevant programs or initiatives.

1. Briefly, how does this topic, program, or initiative currently operate? Where is it located within Oregon’s school systems? How does it ultimately serve students?

The International Baccalaureate (IB) is a program that offers high-quality, accelerated education to students in grades 11-12. IB programs are well-rounded, rigorous, and holistic, focusing on a full curriculum of deep and complex learning provided over two years. Many of the classes taken through the program can be articulated for credit at colleges and universities.

- 18 Oregon high schools currently offer an IB Diploma Programme
- 5 Oregon high schools currently offer an IB Career-related Programme
- 9 districts currently offer these IB Programs at one or more of their high schools: Portland Public, North Clackamas, Tigard-Tualatin, Beaverton, Hillsboro, Lincoln County, Salem, Bend-La Pine, and Eugene.
- Approximately 800 students, about 2% of Oregon’s graduates, completed the requirements for an IB Diploma Program or an IB Career-related Program in spring of 2024.

For students in the IB program, and schools who offer an IB program, having to meet both IB program and Oregon Diploma requirements simultaneously can be challenging. IB program

Oregon State Board of Education Docket



requirements are for two-year holistic programs, while the Oregon Diploma stretches over four years. This allows students to take some Oregon Diploma requirements in grades 9 and 10, but completing all the required credits in those two years is a challenge, and some required Oregon Diploma courses are not developmentally appropriate until a student is in 11th or 12th grade. Additionally, the subject categories for an Oregon Diploma and an IB Program are different and often do not allow a one-to-one match of courses between the two.

2. Please list the specific rule(s), statute(s), or recently passed legislation that allows the Board to take action on this item. Where are they prescriptive and where do they provide the Board and Department flexibility?

HB 4137 (2024) amended ORS 329.451, the statute that governs high school graduation, to provide that students who successfully complete an IB Diploma Programme or IB Career-related Programme can also be considered to have completed an Oregon Diploma. The legislature allows for the State Board of Education to include additional requirements if they see fit, but asks the Board to attempt not to enact requirements that discourage student access to or participation in IB programs.

SB 3 (2023) also amended ORS 329.451 and added a .5 credit Higher Education and Career Path Skills course and .5 credit Personal Financial Education course to the credits required for students to earn an Oregon Diploma, effective January 1, 2027.

In June 2024, the State Board of Education adopted Oregon Administrative Rules requiring that these two credits be earned through stand-alone classes. The Board also allowed districts that could not implement this requirement by January 1, 2027 to request a waiver which, if granted, would extend the requirement for one year only, to January 1, 2028.

3. Has this item come before the Board before? If so, when did the Board last take action, and what was that action?

This item was presented for a first reading at the December 5th, 2024 State Board of Education meeting. The Board has not previously acted on this item.

4. Why is this item coming before the Board now?

HB 4137 took effect on Jan. 1, 2025. ODE’s goal is to have the OARs for the statute in place as early in 2025 as possible so districts can be clear about the requirements for students graduating in June 2025, as well as allowing ODE to provide technical assistance to districts in implementing the new law.

5. Who requested or brought about the need for this item? (Select all that apply.)

- ODE Staff
- Students
- Families

Oregon State Board of Education Docket



- Community-Based Organizations
- Culturally Specific Organizations
- School Districts
- Education Service Districts
- Charter Schools
- Oregon State Legislature
- Educational Associations
- Racial Justice Council
- Federal Government
- One or more of Oregon’s nine federally recognized tribes: _____
- Other: _____

ENGAGEMENT STRATEGY AND LEARNINGS

The State Board of Education expects all items that come before it be reviewed and influenced, to the greatest extent possible, by a robust community engagement process. Using plain language, this section should provide an overview of the role that engagement played in this item, including with Oregon’s nine federally recognized Tribes, other state agencies, and external partners.

6. How did the [Equity Decision Tree](#) inform your office/team engagement strategy? Who is most likely to be affected and how have they been intentionally incorporated into the engagement process for this item?

The Equity Decision Tree informed the engagement strategy by centering the positions of International Baccalaureate district leaders and practitioners. They will be immediately impacted by the rules and bring a unique perspective of both the challenges faced by IB students and their families and the funds of knowledge they possess. ODE considered the inclusion of students in the engagement process, but the logistics of conducting engagement with students under 18 was a barrier.

ODE sent a survey to IB practitioners, which closed on Aug 30th, 2024, to gather information on current practice in the field, and to collect their stories of students who have been impacted by having to meet the requirements of the Oregon Diploma as well as the IB Program. ODE also held a series of engagements for IB Practitioners on August 27 and September 19, 2024, to listen and learn from these practitioners and the information they received from IB students.

ODE also engaged with a general audience in a series of engagements on October 1, 2, and 3, 2024, guided by the knowledge that these rules touch on learning that has been positioned as essential to the Oregon Diploma. Gathering a broad perspective on the impact of these rules was important to forming ODE’s recommendation to the Board, but generating interest in this engagement has been a barrier, possibly due to the small size of the programs. ODE sent an invitation to the general engagement series to 2952 people via gov delivery. 1033 opened the email. Twelve people total attended these sessions, and only one was not affiliated with an IB program.

Oregon State Board of Education Docket



On September 5, 2024 ODE presented to ODE’s Ongoing Rules Community Advisory (ORCA) and gathered their feedback. At that time, the draft rules for IB Diploma equivalency did not explicitly call out the inclusion of the requirements mandated by SB3.

While revising the draft rules in early October, ODE realized the importance of balancing the requirements of HB 4137 and SB 3. HB 4137 amended ORS 329.451, the statute that governs high school graduation, to provide that students who successfully complete an IB Diploma Programme or IB Career-related Programme can also be considered to have completed an Oregon Diploma. SB 3 also amended ORS 329.451, adding additional graduation requirements to the Oregon Diploma. Both bills require changes to OAR 581-022-2000 Diploma Requirements, and this rule needs to honor the intent of both bills. This necessitated changes to the draft rules.

On November 7th, 2024 ODE presented the revised draft of the rules to ODE’s Ongoing Rules Community Advisory (ORCA) and again gathered their feedback. ODE also held an additional engagement with IB practitioners on November 14, 2025 to share the new draft rules and gather feedback.

In order to gain clarity on legislative intent and the intersections of SB 3 and HB 4137, ODE also engaged with the legislature and the governor’s office during November and December of 2024, and early January of 2025.

7. After consulting with ODE’s Rules Coordinator and the Office of Indian Education, did this item require Tribal Consultation and/or Tribal Communication with Oregon’s nine federally recognized tribes? (For more information, please reference ODE’s [Tribal Consultation Toolkit](#).)

- No
- Yes – Both Consultation and Communication.
- Yes – Only Communication.

8. Has your office/team considered how this item intersects with the authority of other state entities that serve the health and education needs of Oregon’s students, or otherwise contribute to the climate of Oregon’s school systems? If so, please select from the below list.

- N/A; this item does not intersect with other state entities.
- Oregon Health Authority (OHA)
- Department of Early Learning and Care (DELIC; formerly ELD)
- Educator Advancement Council (EAC)
- Higher Education Coordinating Commission (HECC)
- Youth Development Oregon (YDO)
- Teacher Standards and Practices Commission (TSPC)
- Oregon Housing and Community Services (OHCS)
- Other: _____

If you selected any of the above entities, please share why they were involved, how the Department partnered with them, and what feedback they provided.

NA

9. Which geographic perspectives are intentionally represented in your office/team engagement strategy?

- Northeast Oregon
- Central and Southeast Oregon
- Southwest Oregon
- Willamette Valley and Central Coast
- Northwest Oregon
- Tribal lands
- Other: _____

Why did your office/team focus on the above geographical perspective(s)?

There are very few IB programs in Oregon, and they are all currently located in these geographic areas.

10. Please highlight some of the key pieces of feedback your office/team received during the engagement process. How did this feedback influence the development of this item? How were differences in opinion accounted for?

Key pieces of feedback from the engagement process include the following broad themes:

The IB Diploma Programme and the IB Career-Related Programme are holistic curriculums that include in-depth, rigorous content across broad subject matters. Some people gave feedback that no additional credit requirements should be added by the Board to honor the rigor and completeness of these programs.

Engagement participants were clear that meeting both the requirements for the Oregon Diploma and an IB Program is a barrier to participation in the program. Satisfying both sets of requirements requires early planning, sometimes beginning in middle school.

Many credit requirements for the Oregon Diploma must be completed before grade 10 for students who want to participate in an IB program.

Schools struggle to create schedules that allow for the credit requirements needed to meet an Oregon Diploma to be taken in grades 9 and 10. Because of scheduling difficulties, some requirements must be taken in grades 11 and 12, simultaneously with IB program requirements. This is a barrier to access for students from groups historically underrepresented in these programs, who may not know that they need to take these courses before beginning the IB program.

Students in IB programs often need to satisfy some Oregon Diploma requirements outside of the regular school day, at their own expense.

Students in IB programs often must choose between participating in the program and participating in a high-interest elective, like band, theater, or participation in student government. Student access to support/advisory classes, such as AVID, can also be impacted.

To fulfill the requirements of SB 3, IB students will need to earn 0.5 credit of Personal Financial Education and .05 credit of Higher Education and Career Path Skills. Based on the feedback ODE received in engagements regarding the difficulty of scheduling courses in IB students' junior and senior years, and to allow districts to best comply with HB 4137 while implementing SB 3, ODE recommends time-limited, case-by-case student waivers be available for Personal Financial Education and Higher Education and Career Path Skills until 2030, at which time districts should have fully implemented SB 3.

Engagement participants also felt that some of the Oregon Diploma requirements were important for IB students to learn as part of an Oregon Diploma. Of the possible Oregon Diploma requirements that could be added as a requirement for an IB student, and given the challenges of adding more requirements for students in IB programs, these credit requirements were considered most critical:

- 0.5 credit of US Civics
- 1 credit of Health

Engagement participants also cautioned against adding all of these requirements, as they felt adding too many additional credit requirements would undo the purpose of the bill.

In response to this feedback, ODE recommends that districts offering an International Baccalaureate Diploma Programme or an International Baccalaureate Career-related Programme develop a curriculum plan that ensures students in an International Baccalaureate Program receive instruction aligned to the adopted standards in Civics and Health.

11. Please describe any additional engagement opportunities your office/team will be pursuing prior to asking the Board to take action on this item.

No additional engagements are planned at this time.

FISCAL AND ADMINISTRATIVE IMPACT ANALYSIS

Equitable resource allocation is a critical component of education equity. Using plain language, this section should describe the fiscal, administrative, and small business impacts of this item, and how it affects the larger social system that serves Oregon's students.

12. After consulting with ODE's Rules Coordinator and Grant Consolidation Team, was this item identified as a grant-related item?

- No
 Yes; please review Appendix B: Grant Consolidation below.

13. Will Board action create fiscal or administrative impacts on districts, ESDs, community-based organizations, and/or the nine federally recognized tribes? If so, please describe the anticipated short- and long-term effects and how they may be felt differently in small, rural, or remote communities.

These rules do not create additional costs for districts or communities.

14. Will Board action create a fiscal or administrative impact on state agencies, units of local government, and/or the public? Will it increase costs associated with compliance for small businesses?

These rules do not create a fiscal or administrative impact on state agencies, units of local government, small businesses, or the public. Costs for families of students pursuing an IB program will likely be reduced, as the need to take extra classes over the summer to “catch up” will be reduced or eliminated.

EQUITY IMPACT ANALYSIS

The State Board of Education envisions an aspirational education system that honors its increasingly diverse student body and affirms every student to reach their full potential in a rapidly shifting global environment. Using plain language, this section should describe the impact of this item on students and the larger social system that serves their health and education needs.

15. How will Board action on this item ultimately impact students and their families, particularly those who have been and continue to be systemically marginalized?

Programs that provide college credit in high school have traditionally been programs of privilege. Currently, these programs require additional time outside of school hours and additional costs for students and their families.

Some examples of cost for students include:

- Many students take Health or PE over the summer online, often from Brigham Young University's high school program. These courses typically cost \$500 each.
- Many students cannot take any electives their 11 and 12 grade year because there is no room in their schedule.

Removing these additional costs doesn't just benefit the students currently enrolled in these programs. It will also broaden access to IB programs for all students. IB practitioners indicated that some students are hesitant to try the IB program, fearing it will create the need to take additional credits outside of normal class schedules or to give up beloved electives to fit all the required credits into the school day.

16. How will Board action on this item ultimately impact school district employees and volunteers, particularly those who have been and continue to be systemically marginalized?

IB programs are difficult for schools to administer and support, and the requirement of supporting students to meet both IB program requirements and Oregon Diploma requirements is part of that burden.

Areas where Board action on this item will positively impact school district employees and volunteers include (but aren't limited to):

- Reducing need for additional teacher FTE
- Reducing difficulty of creating the school schedule
- Reducing the complexity of student advising and family communication

17. What are the anticipated short- and long-term consequences of Board action on this item? Will Board action have a cumulative effect on students, families, educators, districts, or Oregon's school systems?

Board action on this item will have immediate benefits for students, families, educators, and districts. Providing current IB students with this flexibility will allow them to continue to participate in electives, lessen the potential financial burden of participation in the program, and lessen the potential stressful impact of an inflexible school schedule and competing demands for students' time outside of school. Adopting these rules also allows for an easier on-ramp to participation in these programs, improving access for students who have been historically underrepresented in these programs.

Oregon's school systems that currently offer IB programs will be able to more easily create a Master Schedule and provide effective advising for IB students. This easing of program requirements could also encourage districts and schools that do not currently offer an IB program to consider doing so.

18. What are the anticipated short- and long-term consequences of inaction on this item and who would experience those consequences?

If the rule is not passed, access to IB programs will continue to depend on time and financial costs for students outside of the school day. The addition of two new credit requirements, the Personal Financial Education and Higher Education and Career Path Skills credits, will cause additional stress for IB students, who are already experiencing difficulty meeting both the IB program requirements and the Oregon Diploma requirements. The additional flexibility given IB students by HB 4137 will help mitigate the potential that these courses will discourage students from participating in IB programs.

RECOMMENDED ACTION

The State Board of Education has dedicated itself to challenging the status quo and sharing responsibility for every student's academic and lifelong success. Using plain language, this section should describe the choice before the Board, the Department's recommendation, and any other relevant information.

19. Please provide a brief summary of the specific language your office/team is bringing to the Board. Are there any key decisions within this language that your office/team would like the Board to make?

The proposed revisions to OAR 581-022-2000 Diploma Requirements honor the intent of HB 4137 to allow students who have completed an International Baccalaureate program to also satisfy the requirements of an Oregon Diploma. The revisions also honor the intent of SB 3 to require .5 credit of Personal Financial Education and .5 credit of Higher Education and Career Path Skills.

HB 4137 directs the Board to adopt these rules, but also says the rule may include “any other requirements prescribed by the Board by rule for a student who has completed an International Baccalaureate program.”

HB 4137 also says, “when establishing requirements under this paragraph, the board ... shall attempt not to establish requirements that may discourage access to or participation in the International Baccalaureate program.” ODE asks that the Board consider this as a framing lens when considering additional requirements.

ODE offers the recommendations below based on legislative intent and feedback from engagements.

Recommendation 1: Alignment with SB 3

Districts offering an International Baccalaureate Diploma Programme or an International Baccalaureate Career-related Programme will ensure IB students earn 0.5 credit of Personal Finance Education and 0.5 credit of Higher Education and Career Path Skills, that this credit shall not be integrated into other courses, and that this credit be granted via one of the approved credit options described in OAR 581-022-2025.

Recommendation 2: Time-limited student level waiver for SB 3 credits

In order to allow districts to best comply with HB 4137 while implementing SB 3, ODE recommends time-limited, case-by-case student waivers be available for Personal Financial Education and Higher Education and Career Path Skills until 2030, at which time districts should have fully implemented SB 3.

A district may request a waiver:

- on behalf of a student actively pursuing an IB Diploma Program or an IB Career-Related Program
- for .5 credit of Personal Financial Education, and .5 credit of Higher Education and Career Path Skills courses,
- if the student has not had a reasonable opportunity to take the course during their high school years.

Recommendation 3: Instruction aligned to Health and Civics standards

Districts offering an International Baccalaureate Diploma Programme or an International Baccalaureate Career-related Programme will develop a curriculum plan that ensures students in an International Baccalaureate Program receive instruction aligned to the adopted standards in Civics and Health.

20. How is this language responsive to identified needs and/or feedback received through the engagement process? How is it in alignment with [the Board's Mission, Vision, and Values](#)?

The need to reduce the burden on students and school systems to simultaneously complete the requirements for both an International Baccalaureate program and an Oregon Diploma was clearly communicated during engagement. Participant feedback also made clear the value of the Oregon Diploma requirements. The Board and the Legislature has also made clear the importance of the new credit requirements, Personal Financial Education and Higher Education and Career Path Skills. Holding and honoring this tension is an important step in the rulemaking process, and drives ODE to seek innovative and adaptable solutions that will work for Oregon's diverse students and school systems, and allow for expanded access to IB programs for students who have been historically underrepresented.

Feedback received during engagement overwhelmingly emphasized the burden that additional credit requirements place on students who are participating in IB programs, and how these requirements can discourage access to and participation in IB programs.

21. Please describe the action your office/team is recommending to the Board (for example, the adoption of rules or the approval of a waiver) and how it reflects the Department's commitment to academic excellence, belonging and wellness, and reimagining accountability.

The International Baccalaureate programs are rigorous and holistic, and students who complete them demonstrate academic excellence. Adopting these rules will increase student access to these programs by removing some of the barriers that students currently face.

During engagement with educators, Health curriculum was most frequently listed as very important, with participants mentioning that students in IB programs can experience increased stress and noted the importance of content related to Adi's Act. Student wellness will be improved by ensuring that health standards are addressed, and removing some of the barriers to participation in IB programs will also lessen student stress and increase wellbeing.

Oregon State Board of Education Docket



The flexibility built into HB 4137 will mean fewer students are required to choose between an IB program and other school activities, which will increase belonging.

22. Please note any additional support the Department is (or will be) providing to ensure successful implementation of this item.

- N/A; this item does not require any additional support.
- Communications plan
- Technical assistance, professional development, and/or coaching
- Direct or differentiated support for small, rural, or remote school districts
- Corrective Action Processes
- Safety measures
- Organizational culture or practice changes (change management)
- Materials and/or supplies
- Guidance and/or supplemental resources
- Other: _____

23. Has this item changed since the last Board meeting?

- N/A; this item has not previously been before the Board
- No; same as last month
- Yes; please review Appendix A: Second Reading below.

APPENDIX A: SECOND READING

Appendix A should only be completed if "yes" is selected for question 23. Using plain language, this section should provide a summary of any additional engagements, learnings, or changes that have occurred since the First Reading of this item.

1. Please describe any additional engagement opportunities your office/team has pursued since the First Reading of this item. Which perspectives were intentionally included?

Please enter your answer here

2. Has your office/team received any additional public comment on this item? If so, who provided that comment and what feedback did they provide?

3. Please describe any overall learnings that have occurred since the First Reading of this item. How were differences in opinion accounted for?

Oregon State Board of Education Docket



4. Please provide a brief summary of the changes your office/team have made to this item since the First Reading. How are these changes responsive to identified needs and/or feedback received through the engagement process?

APPENDIX B: GRANT CONSOLIDATION

Appendix B should only be completed if “yes” is selected for question 12. Using plain language, this section should provide additional detail on how grant rules have been aligned and designed to support districts and meet administrative needs.

1. Please indicate which of the following underlying processes are required for this grant program.

- Conduct a needs assessment
- Gather and provide additional data
- Submit an application to ODE
- Submit a report to ODE
- Submit a plan to ODE
- Submit a budget to ODE
- Conduct community engagement
- Other: _____

2. How has your team/office worked to encourage more equitable resource allocation and address administrative impacts, particularly for small or rural school districts? How has this grant been aligned with existing grant programs?

Please enter your answer here

3. How are the grant requirements differentiated for small and rural school districts?

Please enter your answer here

DRAFT RULE CHANGES TO 581-022-2000 FOR HB 4137: INTERNATIONAL BACCALAUREATE DIPLOMA

Oregon Department of Education

Chapter 581

Division 22

STANDARDS FOR PUBLIC ELEMENTARY AND SECONDARY SCHOOLS

581-022-2000

Diploma Requirements

(1) Each district school board and public charter school with jurisdiction over high school programs shall award diplomas to all students who fulfill all state requirements as described in sections (2) to (12) of this rule and all local school district requirements as described in district school board policies or all public charter school requirements as described in the policies or charter of the public charter school.

(2) Unit of Credit Requirements for students who were first enrolled in grade 9 during the 2022–2023 school year or first enrolled in grade 9 in any previous school year:

(a) Each student shall earn a minimum of 24 units of credit aligned to the Oregon State Board adopted standards to include:

(A) Language Arts — 4 (shall include the equivalent of one unit in Written Composition);

(B) Mathematics —3 (shall include one unit at the Algebra I level and two units that are at a level higher than Algebra I);

(C) Science — 3;

(D) Social Sciences — 3 (shall include 0.5 unit of US civics credit in addition to at least 2.5 units of credit aligned to the Oregon State Board adopted standards for U.S. history, world history, geography, economics, and financial literacy);

(E) Health Education — 1;

(F) Physical Education — 1;

(G) Career and Technical Education, The Arts or World Languages — 3 (units shall be earned in any one or a combination). (b) A district school board or public charter school with a three-year high school may submit through the waiver process alternative plans to meet unit requirements;

(b) A district school board or public charter school may increase the number of units required in specific areas, and may increase or decrease the number of elective units; however, the total units of credit required for graduation shall not be less than 24;

(3) Unit of Credit Requirements for students who were first enrolled in grade 9 during the 2023-24 school year or first enrolled in grade 9 in any subsequent school year:

(a) Each student shall earn a minimum of 24 units of credit aligned to the Oregon State Board adopted standards to include:

(A) Language Arts — 4 (shall include the equivalent of one unit in Written Composition);

(B) Mathematics —3 (shall include one unit at the Algebra I level and two units that are at a level higher than Algebra I);

(C) Science — 3;

(D) Social Sciences — 3 (shall include 0.5 unit of US civics credit in addition to at least 2.5 units of credit aligned to the Oregon State Board adopted standards for U.S. history, world history, geography, and economics);

(E) Health Education — 1;

(F) Physical Education — 1;

(G) Career and Technical Education, The Arts or World Languages — 3 (units shall be earned in any one or a combination).

(H) Personal Financial Education — 0.5;

(I) Higher Education & Career Path Skills — 0.5.

(b) A district school board or public charter school with a three-year high school may submit through the waiver process alternative plans to meet unit requirements;

(c) A district school board or public charter school may increase the number of units required in specific areas, and may increase or decrease the number of elective units; however, the total units of credit required for graduation shall not be less than 24;

(4) A district school board or public charter school must waive any additional district requirements if students are or, were at any time from grade 9-12:

(a) A foster child, a child receiving 24-hour substitute care for children placed away from their parents or guardians and for whom the child welfare agency has placement and care responsibility. This includes, but is not limited to, placements in foster family homes, foster homes of relatives, group homes, emergency shelters, residential facilities, child care institutions, and pre-adoptive homes. A child is in foster care in accordance with this definition if the foster care facility is licensed and payments are made by the State, Tribal or local agency for the care of the child, whether adoption subsidy payments are being made prior to the finalization of an adoption, or whether there is Federal matching of any payments that are made;

(b) Homeless, a child who lacks a fixed, regular, and adequate nighttime residence; a child who is sharing the housing of other persons due to loss of housing, economic hardship, or a similar reason; is living in motels, hotels, trailer parks, or camping grounds due to the lack of alternative

adequate accommodations; is living in emergency or transitional shelters; or is abandoned in hospitals; a child whose primary nighttime residence that is a public or private place not designed for or ordinarily used as a regular sleeping accommodation for human beings; a child who is living in cars, parks, public spaces, abandoned buildings, substandard housing, bus or train stations, or similar settings; an unaccompanied youth not in physical custody of a parent or guardian;

(c) A runaway, an unmarried child under 18 years of age who, without consent of the parent or other person having legal custody of that child, leaves and stays away from the home or other dwelling place provided for the child by that person;

(d) A child in a military family covered by the Interstate Compact on Educational Opportunity for Military Children;

(e) A child of a migrant worker, a worker that moved as an migratory agricultural worker or migratory fisher due to economic necessity from one residence to another residence, and from one school district to another; or

(f) Enrolled in the Youth Corrections Education Program or the Juvenile Detention Education Program.

(5) A school district or public charter school must accept any credits earned by students qualified for the additional district credit requirements waiver in another school district or public charter school and must apply them toward the 24 Units of Credit Requirements for the diploma.

(6) A school district or public charter school may grant high school credit for courses taken prior to grade 9 if students taking pre-grade 9 courses are required to meet performance criteria that are equivalent to the performance criteria for students taking the same high school courses.

(7) Course syllabi shall be written for courses in grades 9 through 12 and shall be available to students, staff, parents, the district school board and other interested individuals.

(8) Each student shall demonstrate proficiency in essential skills adopted by the State Board of Education as provided in OAR 581-022-2115.

(9) School districts shall develop a process that provides each student the opportunity to develop an education plan and build an education profile in grades 7 through 12 with adult guidance. The plan and profile shall be reviewed and updated periodically (at least annually) and be supported by a Comprehensive School Counseling Program as defined in OAR 581-022-2060.

(10) Each student shall develop an education plan and build an education profile.

(a) Each student shall develop an education plan that:

(A) Identifies personal and career interests;

(B) Identifies tentative educational and career goals and post high school next steps (i.e. college, workforce, military, apprenticeship, other);

(C) Sets goals to prepare for transitions to next steps identified in section (10)(b);

(D) Designs, monitors and adjusts a course of study that meets the interest and goals of the student as described in subsection (a) (A), (B) and (C) of this section that includes but is not limited to:

- (i) Appropriate coursework and learning experiences;
- (ii) Identified career-related learning experiences; and
- (iii) Identified extended application opportunities.

(b) Through the education profile each student shall:

(A) Monitor progress and achievement toward standards including:

- (i) Content standards;
- (ii) Essential skills;
- (iii) Extended application standard; and
- (iv) Other standards where appropriate (e.g. industry standards).

(B) Document other personal accomplishments determined by the student or school district.

(C) Review progress and achievement in subsection (b)(A) and (B) of this subsection at least annually.

(11) Each student shall build a collection of evidence, or include evidence in existing collections(s), to demonstrate extended application (as defined in OAR 581-022-0102).

(12) Each student shall participate in career-related learning experiences outlined in the education plan (as defined in OAR 581-022-0102).

(13) The following course requirements apply to the International Baccalaureate program:

(a) A student who has completed an International Baccalaureate program shall be considered to have satisfied the requirements of sections (2) and (3) of this rule if the student:

(A) satisfies all the requirements as described in the International Baccalaureate Organization's International Baccalaureate Diploma Programme curriculum; or

(B) satisfies all the requirements as described in the International Baccalaureate Organization's International Baccalaureate Career-related Programme curriculum.

(b) Unless waived in accordance with OAR 581-022-2000(14), a school district or public charter school offering an International Baccalaureate Diploma Programme or an International Baccalaureate Career-related Programme shall ensure students in an International Baccalaureate program complete .5 credit of Personal Financial Education and .5 credit of Higher Education and Career Path Skills as stand-alone courses.

(c) A school district or public charter school offering an International Baccalaureate Diploma Programme or an International Baccalaureate Career-related Programme shall develop a

curriculum plan that ensures students in an International Baccalaureate Program receive instruction aligned to the adopted standards in Civics and Health. This plan shall be kept on file at the district and be available to ODE upon request.

(d) Only for the purpose of satisfying requirements in Section 13 paragraph (a) of this rule, a person who is not an external International Baccalaureate examiner may grade assessments or examinations for either program.

(e) A school district or public charter school may establish requirements that are in addition to the requirements prescribed by Section 13 paragraph (a) of this rule. When establishing requirements, a school district or public charter school shall attempt not to establish requirements that may discourage student access to or participation in the International Baccalaureate program.

(14) A district or public charter school may request a waiver of the credit requirements described in sections (3)(a)(H) and (3)(a)(I) of this rule on behalf of a student participating in an International Baccalaureate Program who entered high school between July 1, 2024 and July 1, 2027, in accordance with the following requirements:

(A) To receive a waiver under this section, the district or public charter school must demonstrate to the satisfaction of the Oregon Department of Education that the student was unable to access courses necessary for the student to satisfy the credit requirements due to a lack of reasonable opportunities to take the course.

(B) For a waiver to be considered by the Oregon Department of Education, it must include:

(i) An explanation of why the student did not have a reasonable opportunity to access the required courses;

(ii) An explanation of how the district or public charter school ensured the student received access to personal finance, higher education, and career path content through means other than the required courses;

(iii) The district or public charter school's corrective action plan to make the required courses more accessible for students participating in an International Baccalaureate Program; and

(iv) Local school board approval of the application and the date of such approval.

(C) Waivers may be approved at the Oregon Department of Education's discretion. Denied waivers may be appealed to the State Board of Education.

(D) Section (14) of this rule shall sunset effective July 1, 2030.

(13) (15) Notwithstanding sections (1) to (12) of this rule, each district school board or public charter school governing board with jurisdiction over high school programs shall award a modified diploma to those students who have demonstrated the inability to meet the full set of academic content standards

even with reasonable modifications and accommodations and who fulfill all requirements as described in OAR 581-022-2010.

(14) **(16)** Notwithstanding sections (1) to (12) of this rule, each district school board or public charter school governing board with jurisdiction over high school programs shall award an extended diploma to those students who have demonstrated the inability to meet the full set of academic content standards even with reasonable modifications and accommodations and who fulfill all requirements as described in OAR 581-022-2015.

(15) **(17)** Notwithstanding sections (1) to (12) of this rule and as provided in OAR 581-022-2020, schools districts and public charter schools shall make a certificate of attendance available to students as an alternative for students who do not obtain the regular diploma, modified diploma or extended diploma.

(16) **(18)** Attendance Requirements:

(a) Twelve school years shall be required beginning with grade 1, except when the school district adopts policies providing for early or delayed completion of all state and school district credit and performance requirements;

(b) Notwithstanding subsection (a) of this section, a student may satisfy the requirements of sections (2)(6) of this rule in less than four years. If the school district or public charter school has the consent of the student's parent or guardian, a school district or public charter school shall award a diploma to a student upon request from the student, if the student satisfies the requirements for the diploma that apply to the student based on the date of graduation of the student or the school year when the student first enrolled in grade 9, as applicable.

(c) If a school district or public charter school has the consent of a student's parent or guardian, the school district or public charter school may advance the student to the next grade level if the student has satisfied the requirements for the student's current grade level.

(d) The requirement for obtaining the consent of a student's parent or guardian under subsections (b) and (c) of this section does not apply to a student who is:

(A) Emancipated pursuant to ORS 419B.550 to 419B.558; or

(B) 18 years of age or older.

(e) The district school board may adopt policies for alternative learning experiences, such as credit by examination and credit for off-campus experiences;

(f) With any modification of the attendance requirements for graduation, school district and public charter school staff shall consider age and maturity of students, access to alternative learning experiences, performance levels, school district or public charter school guidelines and the wishes of parents and guardians.

(17) **(19)** A school district or public charter school shall ensure that students have access to the appropriate resources to achieve a diploma at each high school in the school district or at the public charter school.



HB 4137: International Baccalaureate and the Oregon Diploma

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59

HB 4137 Bill Implementation: Context



Oregon Department of Education

Directs the State Board of Education **to adopt rules** by which a student who has satisfied the requirements of either the IB Diploma Programme or the IB Career-related Programme will also be considered to have satisfied the requirements for an Oregon Diploma.



Background

HB 4137 Background: International Baccalaureate (IB) Programs

The International Baccalaureate Programs described in HB 4137

- provide high-quality, well-rounded education to students in grades 11-12
- focus on a holistic curriculum of deep and complex learning provided over two years.

and

- Meeting both IB program and Oregon Diploma requirements can be challenging for students and require time and money outside of the school day
- Including opportunities for students to meet both IB Program and Oregon Diploma requirements can be challenging for schools to accommodate in their high school schedule.

★ IB Diploma Program (18)

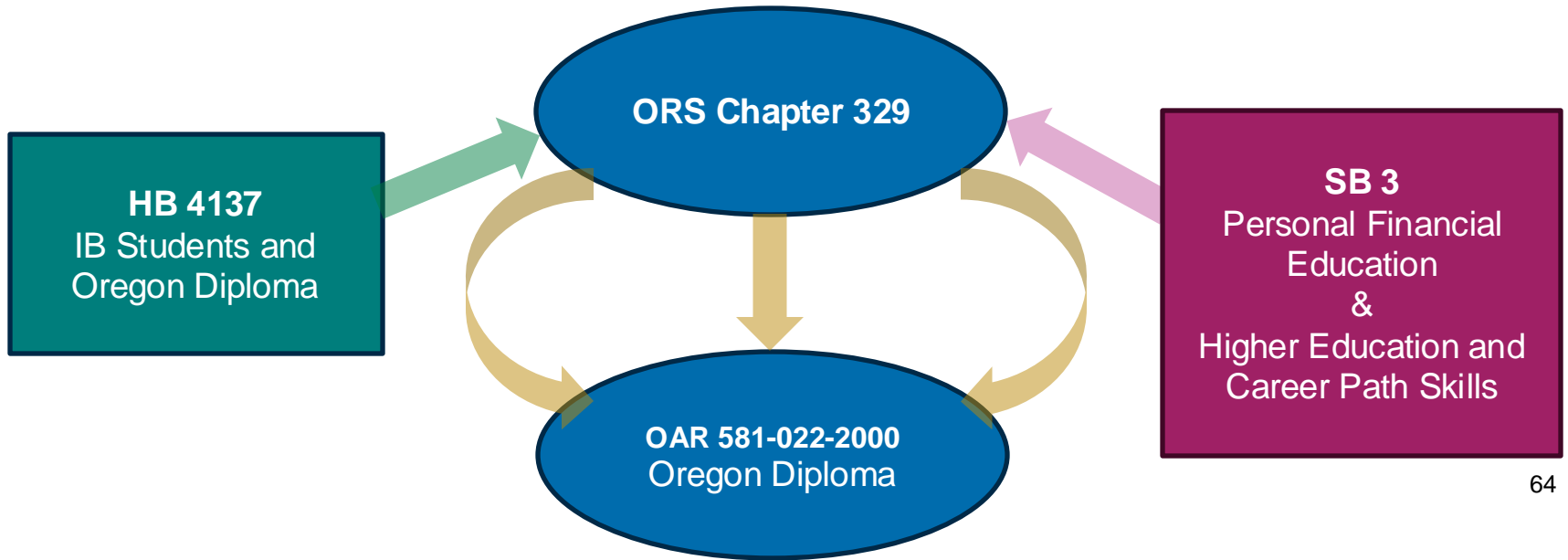
★ IB Career-Related Program (5)

In 2024, about 2% of Oregon's high school graduates completed the requirements for an IB Program



International Baccalaureate Programs in Oregon

Intersection of SB 3 and HB 4137



Honoring the intent of **both** SB 3 and HB 4137

HB 4137

International Baccalaureate
and Oregon Diploma

SB 3

Personal Financial Education
Higher Education and Career Path
Skills





Engagement

International Baccalaureate Diploma: Engagement Strategy

- Series of Advisory Engagements with current IB Administrators, Teachers, and Coordinators
- Engagement Series for a wide, general audience
- ORCA
- **Legislature and Governor's office**

Personal Financial Education and Higher Education and Career Path Skills are important learning for all Oregon graduates.

67



Proposed Rules

(no changes from prior presentation)

Recommendation 1: SB 3 Alignment

Districts offering an International Baccalaureate Diploma Programme or an International Baccalaureate Career-related Programme will ensure IB students complete:

- .5 credit of Personal Financial Education, and
- .5 credit of Higher Education and Career Path Skills

Recommendation 2:

Time-limited, case-by-case student waivers for Personal Financial Education & Higher Education and Career Path Skills courses.

A district may request a waiver:

- on behalf of a student actively pursuing an IB Diploma Program or an IB Career-Related Program
- for .5 credit of Personal Financial Education, and .5 credit of Higher Education and Career Path Skills courses,
- if the student has not had a reasonable opportunity to take the course during their high school years.

Waiver Timeline

District Waiver Available		IB Student Waiver Available			No Waiver Available
2025-26 SY	Class of 2027	Class of 2028	Class of 2029	Class of 2030	2030-31
<p>Most districts begin offering</p> <p>Personal Financial Education and Higher Education and Career Path Skills</p>	<p>Personal Financial Education and Higher Education and Career Path Skills</p> <p>required for diploma, district waiver available.</p>	<p>Personal Financial Education and Higher Education and Career Path Skills</p> <p>required for diploma, IB student waiver available.</p>			<p>Personal Financial Education and Higher Education and Career Path Skills</p> <p>courses required for diploma, no waivers available.</p>
Freshman	Sophomore	Junior	Senior		
	Freshman	Sophomore	Junior	Senior	

Equity Impact:

Adding time-limited, case-by-case student waivers (until 2030) for SB 3 requirements, **removes barriers** for students who want to graduate with the IB Diploma and who are unable to access SB 3 courses during their 9th-10th grade years, before beginning the IB program in 11th-12th grade years.

The waiver also aligns with the legislature's charge in HB 4137, section (1)(d)(C), to “attempt not to discourage participation” in IB programs, while⁷² still honoring the requirements of SB 3.

Recommendation 3: Instruction in Health and Civics



Oregon Department of Education

Engagement Feedback:

- Students actively pursuing an IB Diploma Program or an IB Career-Related Program are receiving a holistic, well-rounded education, and that should be honored.
- Content aligned to the Health and Civics standards is an essential part of the Oregon Diploma and should not be missed.

Instruction in Health and Civics

Districts offering an International Baccalaureate Diploma Programme or an International Baccalaureate Career-related Programme will develop a curriculum plan that ensures students in an International Baccalaureate Program receive instruction aligned to the adopted standards in Civics and Health.

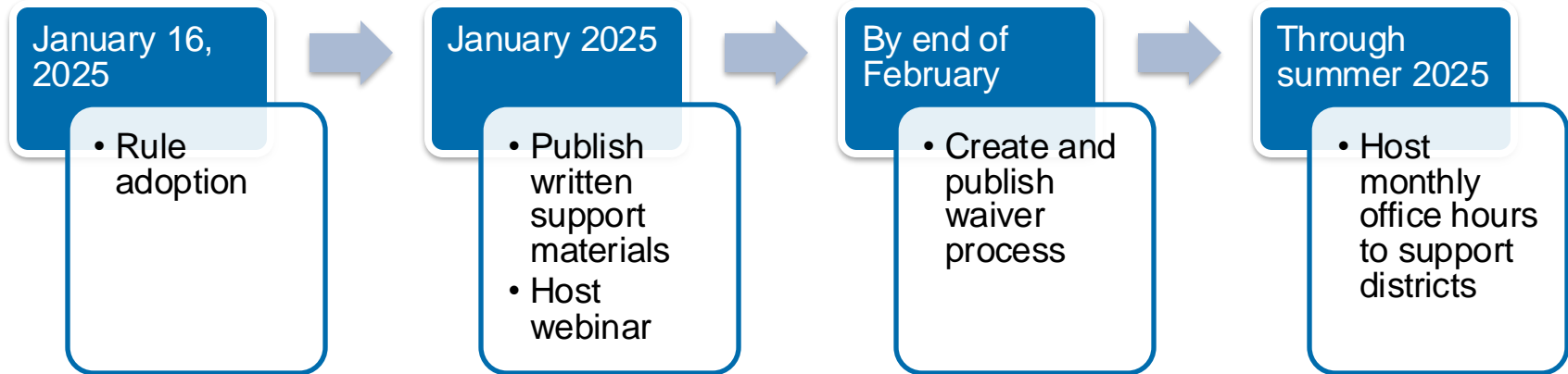
**this plan should be on file with the district and available to ODE by request*⁷⁴



Next Steps

HB 4137: International Baccalaureate Diploma

Next Steps



One-on-one technical support provided as needed.



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Thank you!

OAR 581-###-### Definitions

1. Public education provider means:
 - . A school district, as described in ORS 330.005
 - a. A public charter school, as described in ORS 338.005
 - b. An education service district, as described in ORS 334.003
 - c. A long term care or treatment facility, as described in ORS 343.961;
 - d. The Youth Corrections Education Program;
 - e. The Juvenile Detention Education Program; or
 - f. The Oregon School for the Deaf.
2. Education workforce means licensed educators and classified staff who are:
 - . Employed by a public education provider; or
 - a. Under contract to provide services to a public education provider.
3. Licensed educator means a teacher, administrator, or other school professional who is licensed, registered or certified by the Teacher Standards and Practices Commission.
4. Classified staff means all employees of a public education provider except those for whom a Teacher Standards and Practices Commission license is required as a basis for employment in a public education provider. This also includes employees who hold licenses issued by agencies other than TSPC.
5. Employed means paid by a public education provider as a regular employee.
6. Under contract means paid by a public education provider through a contracted third party or contracted individually.

OAR 581-###-### Survey Purpose

1. The Department of Education shall annually administer a web-based survey of the education workforce designed to:
 - . Assist in the gathering of information about the perceptions of working experiences of the education workforce of this state, including the experience in the school district and in individual schools.
 - a. Evaluate school climate and culture from the education staff perspective.
2. Individual responses collected through the survey will be confidential and anonymous.
3. Data from the survey shall be used to support the following purposes:
 - . Honor the importance and necessity of incorporating voices of members of the education workforce into the continuous improvement process for Oregon's public education systems.

- a. Provide Oregon’s public education providers, state agencies, and the Legislature with meaningful and actionable data regarding perceptions of working experiences, climate, and culture that can be used in combination with state and local data to improve systemic working conditions.

OAR 581-###-### Survey Administration and Reporting

1. The Department of Education shall annually prepare and administer a web-based survey of the members of the education workforce. The department shall:
 - . Prepare and maintain a survey tool based on research-based best practices and the needs of members of the education workforce of this state.
 - a. Identify an administration period for the survey, during which the department will make available the web-based survey to public education providers for dissemination to members of the education workforce actively employed by or under contract to provide services to the public education provider during the survey window.
 - b. Identify any minimum participation requirements or suppression rules for survey results to be reported in order to protect respondent anonymity.
 - c. Consult relevant advisory groups on topics identified in this section, which may include but is not limited to survey content, item type, response category options, questionnaire length, delivery methods, administration window, language translation, accessibility tools and supports, data visualization, and public reporting and dissemination.
 - d. Collaborate with the Educator Advancement Council when making any changes to survey standards adopted by the State Board of Education.
 - e. Disseminate information to public education providers, which may include but is not limited to survey access, timelines, purpose, and content as well as guidance concerning survey administration best practices, appropriate use of survey results, and the protection of survey respondent confidentiality and anonymity.
2. Prior to and during the survey period, each public education provider shall encourage members of their education workforce to participate in the survey by distributing to individual members information provided by the Department of Education.
3. During the survey period, each public education provider shall ensure that members of their education workforce have the opportunity to participate in the survey by:
 - . Emailing the web-based survey link(s) to their education workforce members at least twice during the survey period; and
 - a. Connecting their education workforce members to the Department of Education regarding questions about the survey and accessibility needs.
4. The Department of Education shall annually:
 - . Review the survey results.

- a. Prepare an interactive data visualization tool that provides access to aggregated and suppressed survey results at multiple levels, such as schools and districts, while maintaining confidentiality and anonymity of survey respondents.
 - b. Disseminate aggregated and suppressed survey results to public education providers.
 - c. Submit a report on education workforce satisfaction to the interim committees of the Legislative Assembly related to education.
5. The Department of Education may enter into a contract or a partnership with any public or private entity, including the federal government, for the purpose of this section.

SB 283 (2023) EDUCATOR WORKFORCE SURVEYS SECTION 4.

(1) As used in this section:

(a) **“Education workforce” means licensed and classified staff who are:**

- (A) Employed by a public education provider; or
- (B) Under contract to provide services to a public education provider.

(b) **“Public education provider” means:**

- (A) A school district;
- (B) A public charter school;
- (C) An education service district;
- (D) A long term care or treatment facility, as described in ORS 343.961;
- (E) The Youth Corrections Education Program;
- (F) The Juvenile Detention Education Program; or
- (G) The Oregon School for the Deaf.

(2) Each **public education provider shall:**

(a) **Encourage** members of the education workforce of the public education provider to participate in a **survey administered by the Department of Education** that is designed to assist in the **gathering of information about the working experiences** of the education workforce of this state, including the experience **in the school district and in individual schools**; and

(b) Ensure that members of the education workforce of the public education provider **have the opportunity to participate** in the survey described in paragraph (a) of this subsection.

(3) The State Board of Education, in collaboration with the Educator Advancement Council, shall **adopt by rule the standards** for the survey administered under this section.

(4) The department shall annually review the survey identified in subsection (2) of this section and:

(a) **Make the information available** to school district boards, administrators of school districts and administrators of schools in a manner that allows for the accessibility of the information:

- (A) On a district level and a school level; and
- (B) Through the interactive data visualization tool; and

(b) **Report annually** on education workforce satisfaction to the interim committees of the Legislative Assembly related to education.

(5) The department may enter into a contract or a partnership with any public or private entity, including the federal government, for the purpose of this section.

Oregon State Board of Education

January 16, 2025

AGENDA ITEM:

<p>SUBJECT: SB 283 Education Workforce Survey Rules – 2nd Read</p> <p>STAFF NAME & OFFICE: Josh Rew, RADAR; Tamara Dykeman, Director’s Office</p> <p>SB 283 Section 4 directs ODE to annually administer a survey of the education workforce, and for the State Board to adopt standards for the survey in consultation with the Educator Advancement Council.</p> <p><input checked="" type="checkbox"/> New Rule <input type="checkbox"/> Amend Existing Rule <input type="checkbox"/> Repeal Rule</p>	<p><input type="checkbox"/> First Reading <input type="checkbox"/> Presentation <input type="checkbox"/> No Presentation</p> <p><input checked="" type="checkbox"/> Action <input type="checkbox"/> Temp Rule <input checked="" type="checkbox"/> Presentation <input type="checkbox"/> No Presentation</p>
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BACKGROUND

The Legislature passed SB 283 in 2023, and Section 4 creates a new requirement that ODE annually administer a survey to licensed and classified members of the education workforce on working experiences, climate, and culture. School districts are required to ensure staff have the opportunity and are encouraged to participate in the survey, and ODE must make results available at the school and district levels, as well as submit a report on the survey to the Legislative subcommittees.

No rules currently exist relating to statewide surveys of education staff. Section 4 calls on the State Board to adopt rules in collaboration with the Educator Advancement Council. The State Board has discretion to adopt standards for the survey, as well as more clearly define what districts are required to do in administering the survey, as SB 283 requires districts to ensure staff have the opportunity and are encouraged to participate in the survey.

Since February 2024, ODE has convened a cross-agency workgroup, including staff who support the EAC, to plan for and develop the survey, as well as conduct engagement with education partners and staff across the state to inform the survey design and implementation plan. In addition to meeting with educational association partners, ODE contracted with Oregon’s Kitchen Table from April to August 2024 to gather input from education staff in a variety of roles within Oregon’s public school system to help inform the scope, content, and delivery of Oregon’s new annual statewide survey on the experiences of the state’s education workforce. Oregon’s Kitchen Table (OKT) is a statewide program that creates ways for Oregonians from every corner of the state to share their hopes, values, and ideas and to influence the decisions that affect them. OKT is a program of Portland State University.

OKT heard from approximately 200 people in a variety of settings. Approximately 125 people participated in the 8 conversations (2 in-person and 6 via Zoom), which ranged from 5 attendees to 50 attendees. In addition, 7 people submitted input via writing through an online form and 7 people participated in individual interviews. OKT also presented to or spoke with approximately 60 people through 2 events. Participants live in a variety of counties across the state, and they work both in large, more populous districts and in smaller, less populous districts. While this engagement process is not a comprehensive representation of the state’s very large and diverse education workforce, it provides a

Oregon State Board of Education

January 16, 2025

AGENDA ITEM:

range of perspectives, experiences, and hopes for ODE to consider in developing first a pilot survey and subsequent years' surveys. ODE and OKT worked with the following organizations to hear from their constituents:

- Oregon School Personnel Association
- Oregon Substitute Teachers Association
- Oregon Association of Educational Service Districts
- Oregon School Psychologists Association
- Coalition of Oregon School Administrators
- Oregon Education Association
- Oregon School Employees Association
- Oregon Trail Regional Educator Network
- Oregon School for the Deaf
- ODE staff members working with charter schools
- ODE staff members working with correctional, hospital, and treatment schools

Staff have also engaged with the members of the Educator Advancement Council for their input and feedback on the survey design and administrative rules at the October Council meeting, as well as ODE's Ongoing Rules Community Advisory (ORCA) at their October meeting.

SUMMARY OF PREVIOUS BOARD ACTION

N/A

HAS THE RULE CHANGED SINCE LAST BOARD MEETING?

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

No; same as last month

Yes – As follows:

OAR 581-###-### Definitions - no changes

OAR 581-###-### Survey Purpose - no changes

OAR 581-###-### Survey Administration and Reporting

- Expanded scope of information that the Department will share with public education providers about the EVE survey;
- Removed the requirement the education providers ensure members have access to internet-enabled computer;
- Clarified that education providers must “ensure” members to participate by providing the survey link to their employees at least twice during the survey window;
- Removed the requirement that ODE provides specific levels of data instead requiring ODE to provide “multiple” levels of data (school district, ESD level, etc) without specifying which ones.

POLICY ISSUE OR CONCERNS

Oregon State Board of Education

January 16, 2025

AGENDA ITEM:

In developing the implementation plan and administrative rules for the new survey, ODE staff have used Section 4 of SB 283, input gathered through the community engagement process, as well as research-based best practices for education workforce surveys, gathered through researching national, international, and local survey tools.

Through the community engagement process, ODE aimed to hear from staff across the state, on what was important to them, particularly staff who have not had the opportunity to participate in a statewide survey on working conditions previously – this largely includes classified staff, staff serving in alternative programs, and district-level staff. Several key themes emerged from this engagement process (and are further described in the attached report from Oregon’s Kitchen Table):

- **Anonymity is important:** Across the different conversations and interviews, participants repeatedly emphasized the importance of anonymity to feel comfortable sharing their work experiences. While this was a common concern for people in different settings, those who work in small districts and schools particularly emphasized that ensuring anonymity was a top priority for them. When asked how people would like the results to be presented and shared, people generally said they’d like to see it aggregated at a regional level in order to help ensure anonymity.
- **Building trust will take time:** Participants want reassurance that their input is valued and will influence decisions and actions, which will take time to demonstrate with this new survey. They shared how important it is to them to see staff input recognized. Many people said that knowing their input would be considered and that the input would lead to some tangible action would be enough to encourage them and others to participate. There is strong interest in being able to see results. A few people noted that they would like to have transparency and that it was important for the broader community to see results.
- **Survey fatigue vs. no opportunity to share voice:** Participants talked about “survey fatigue” in two ways: (1) People simply receive too many requests to fill out surveys and don’t have the time or energy to respond; and (2) People are tired of responding to surveys and then seeing no action or hearing no response. At the same time, people who have not been asked about their work experience indicated that this survey’s inclusivity would help in overcoming survey fatigue.
- **Accessibility and messaging:** People emphasized the need to make sure all communications about the survey – and the content itself – clearly indicate who the survey is for, naming particular roles, and what decision makers intend to do with the results. They also offered suggestions for how to encourage people to participate and make the survey as easy as possible to access, including ensuring that participants have time to take the survey, have access to a computer, and offering it in languages other than English.
- **Use of results is critical:** Many participants – across a variety of roles – expressed concern about how the results will be used. While participants expressed hopes that the survey would help in some way to address recruitment and retention issues, there was also skepticism that the results would even be considered and concerns that, at best, survey results could lead to ill-considered initiatives that don’t address the true drivers of recruitment or retention issues or lead to “blame” or finger pointing at particular individuals or organizations. There is a need for “careful meaning making” or interpretation to ensure that the results meet the purpose of and people’s expectations for the survey.

Oregon State Board of Education

January 16, 2025

AGENDA ITEM:

The usefulness of results for local and state leaders will be dependent on the participation rates, both locally and statewide, which means it is critical that ODE design and administer a survey that is responsive to the input gathered through the community engagement process. Based on the input gathered, ODE has developed an implementation plan that prioritizes anonymity of results, that is intentionally designed to collect feedback during the first year of implementation and uses robust and clear communication regarding the survey and its results. The implementation plan must also account for and align with other initiatives facing local district leaders and staff – such as alignment with the required SEED survey for students. In planning for the sharing of results, ODE staff are considering how best to ensure that results are meaningful to local and state leaders, while maintaining the confidentiality of staff who participate. Staff are also planning to co-create with education partners a toolkit and resources for leaders that will support use of survey results in a constructive and appropriate way.

Specific Feedback on the rules:

- The ORCA provided feedback regarding the definition of “classified staff.” The definition used is aligned with the definition in SB 283, despite there being a different definition adopted in SB 1552 (2024) regarding just cause. The SB 283 definition is more inclusive, which is aligned with the legislative intent that all members of the education workforce should have the opportunity to participate.
- Recognition that staff may be required to complete the survey after their working hours, since the law does not require districts to provide them time during the workday.
- Recognition that early learning and care staff are included only in cases where they are employed by entities named in the law and the rules.
- Concern regarding requirement that districts provide access to an internet-enabled computer and that districts share plans for how they will use survey results.

EQUITY IMPACT ANALYSIS

ODE aims to create a meaningful statewide survey of all education staff and to promote equitable access and participation in survey. The equitable administration of this survey will support all education staff to have a voice in how our education system serves students, therefore providing additional perspectives to be used in improvement planning for serving students and supporting staff. The survey can also create accountability for state and local education agencies to use survey results from education staff, particularly those who are members of groups systematically marginalized, to improve systems. It is important to recognize that the impact of both the survey administration, as well as the results, will be different for very small schools and districts (i.e., less than 10 staff) than for larger schools and districts.

Collection of demographic, professional, and experiential information about survey takers is carefully considered and weighted against the desire for anonymity and confidentiality. In order to protect identities of minority groups within a locality, results will not be shared in any disaggregated way at a local level. However, disaggregation at the statewide or regional level will help the state understand the experiences of historically underserved populations.

FISCAL ANALYSIS

Oregon State Board of Education

January 16, 2025

AGENDA ITEM:

The survey required by SB 283 is unfunded; ODE is unable to contract with an outside entity to develop, conduct, and report on the survey. ODE and district staff will absorb the responsibilities; therefore, the rules attempt to minimize the administrative and fiscal requirements for schools and districts. Rules require minimal resource allocation (time, staffing, financial resources) for the administration of the required survey within school and district buildings.

EFFECT OF A “YES” OR “NO” VOTE

Yes: The Board will adopt the rules to implement the EVE workforce survey. These rules will provide greater clarity to education partners on how the Department will implement and interpret the requirements for education providers to encourage and facilitate their employees to complete the survey.

No: The agency will still be required to implement the EVE workforce survey, but we would not have the level of clarity for implementation as we would if the rules were enacted. Failure to adopt rules may result in low and uneven participation, particularly among groups who have never been surveyed by the state (i.e. classified staff, contracted staff, district-based staff) as ODE will be unable to administer the survey with clear guidance for districts regarding requirements.

STAFF RECOMMENDATION

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

ATTACHMENTS

Attachment 1: Draft EVE Workforce Survey Rules

ADOPT: 581-017-0805

RULE TITLE: Early Literacy Community Grants Program: Funding

NOTICE FILED DATE: 01/23/2024 RULE SUMMARY: This rule requires Early Literacy Community Grants Program applicants to submit a detailed budget on how the grants from this program will be used.

RULE TEXT:

(1) Applicants must submit a detailed budget that explains how Grant funds will be used. Expenditures for community grants must be approved prior to being incurred and align with agency policy.

(2) Indirect costs will be allowed as a percentage of the direct costs of the Grant award disbursed as follows:

(a) up to five percent for school districts, education service districts, public charter schools, early learning hubs, or postsecondary institutions of education;

(b) up to fifteen percent for community-based organizations, public libraries, or providers of early learning services;

(c) indirect costs for partnerships or consortiums will be allowed based on the lead entity's organization type;

(d) for Tribes, up to fifteen percent or the Tribe's federally recognized indirect rate, as provided in the grant agreement.

(3) Applicants may use Grant funds only for authorized purposes.

STATUTORY/OTHER AUTHORITY: ORS 327.254, ORS 327.274, ORS 327.800, ORS 327.843

STATUTES/OTHER IMPLEMENTED:

Summary

Meeting Date: 1/16/2025

Title: *Early Literacy Tribal Grant Rule Amendment*

Status: First Reading

Presentation: Yes

Key Staff: April Campbell & Nicole Barney

Topic Summary: This item proposes amendments to OARs 581-017-0805 and 581-017-0807 to honor tribal sovereignty by establishing standalone rules for Tribal Early Literacy grants and including Tribal federal indirect cost rates. These amendments address clarity and alignment with sovereignty and equity. The Office of Indian Education seeks the Board’s support for these changes to strengthen culturally responsive education for Tribes.

ODE Education Equity

Stance

Education equity is the equitable implementation of policy, practices, procedures, and legislation that translates into resource allocation, education rigor, and opportunities for historically and currently marginalized youth, students, and families including civil rights protected classes. This means the restructuring and dismantling of systems and institutions that create the dichotomy of beneficiaries and the oppressed and marginalized.

BACKGROUND AND NEED

Members of the State Board of Education are volunteers, with unique professional and lived experiences. Using plain language, this section should provide context for this item, including any needed overviews of relevant programs or initiatives.

- 1. Briefly, how does this topic, program, or initiative currently operate? Where is it located within Oregon’s school systems? How does it ultimately serve students?**

Situated within the broader Early Literacy Initiative, the Tribal Early Literacy Grants support the nine federally recognized Tribes of Oregon in developing and enhancing their early literacy and language preservation programs. These programs are critical for fostering foundational literacy skills while ensuring the preservation and revitalization of Indigenous languages, which are integral to tribal identity and culture.

By aligning literacy development with cultural values and language preservation, the grants aim to support Native youth and families, ultimately contributing to improved educational outcomes and cultural continuity.

- 2. Please list the specific rule(s), statute(s), or recently passed legislation that allows the Board to take action on this item. Where are they prescriptive and where do they provide the Board and Department flexibility?**

Oregon State Board of Education Docket



House Bill 3198 and OARs 581-017-0805 and 581-017-0807 provide the foundation for the Board to take action on this item.

House Bill 3198 establishes the legislative framework for the Early Literacy Initiative. The OARs provide flexibility for the Board of Education and the Oregon Department of Education, Office of Indian Education by allowing discretion in defining how grant funding is structured, administered, and evaluated. While the rules set clear parameters for eligibility and compliance, they give the Board and the Department the flexibility to adapt implementation processes, timelines, and administrative requirements to best serve the goals of the initiative and honor tribal sovereignty.

This flexibility ensures that the Board and the Oregon Department of Education, Office of Indian Education can respond to unique circumstances, collaborate effectively with Tribes, and refine processes as needed to achieve equitable and culturally responsive outcomes.

3. Has this item come before the Board before? If so, when did the Board last take action, and what was that action?

This item has come before the Board previously. The Board last took action in October 2024, approving temporary rules (OAR 541-017-0805) to include Tribal federal indirect rates in the grant administration process.

4. Why is this item coming before the Board now?

This item is coming before the Board now to establish permanent rules regarding Tribal federal indirect rates before the temporary rules expire and to address the broader need for standalone rules for Tribal Early Literacy grants.

5. Who requested or brought about the need for this item? (Select all that apply.)

- ODE Staff
- Students
- Families
- Community-Based Organizations
- Culturally Specific Organizations
- School Districts
- Education Service Districts
- Charter Schools
- Oregon State Legislature
- Educational Associations
- Racial Justice Council
- Federal Government
- One or more of Oregon’s nine federally recognized tribes: _____

Oregon State Board of Education Docket



Other: _____

ENGAGEMENT STRATEGY AND LEARNINGS

The State Board of Education expects all items that come before it be reviewed and influenced, to the greatest extent possible, by a robust community engagement process. Using plain language, this section should provide an overview of the role that engagement played in this item, including with Oregon’s nine federally recognized Tribes, other state agencies, and external partners.

6. How did the [Equity Decision Tree](#) inform your office/team engagement strategy? Who is most likely to be affected and how have they been intentionally incorporated into the engagement process for this item?

The Equity Decision Tree informed the engagement strategy by emphasizing intentional inclusion of those most affected by the proposed rules. The need for these rule changes emerged from internal Early Literacy Meetings, along with informal discussions at Government-to-Government Education Clusters and AI/AN Advisory Committee meetings.

The individuals most likely to be affected are tribal youth and families, as these rules directly impact the resources and structures supporting early literacy and language programs. The engagement process ensured their priorities and insights were considered in alignment with equity and sovereignty principles.

7. After consulting with ODE’s Rules Coordinator and the Office of Indian Education, did this item require Tribal Consultation and/or Tribal Communication with Oregon’s nine federally recognized tribes? (For more information, please reference ODE’s [Tribal Consultation Toolkit](#).)

- No
- Yes – Both Consultation and Communication.
- Yes – Only Communication.

8. Has your office/team considered how this item intersects with the authority of other state entities that serve the health and education needs of Oregon’s students, or otherwise contribute to the climate of Oregon’s school systems? If so, please select from the below list.

- N/A; this item does not intersect with other state entities.
- Oregon Health Authority (OHA)
- Department of Early Learning and Care (DELIC; formerly ELD)
- Educator Advancement Council (EAC)
- Higher Education Coordinating Commission (HECC)
- Youth Development Oregon (YDO)
- Teacher Standards and Practices Commission (TSPC)
- Oregon Housing and Community Services (OHCS)
- Other: _____

Oregon State Board of Education Docket



If you selected any of the above entities, please share why they were involved, how the Department partnered with them, and what feedback they provided.

N/A

9. Which geographic perspectives are intentionally represented in your office/team engagement strategy?

- Northeast Oregon
- Central and Southeast Oregon
- Southwest Oregon
- Willamette Valley and Central Coast
- Northwest Oregon
- Tribal lands
- Other: _____

Why did your office/team focus on the above geographical perspective(s)?

Our office focused on tribal lands because these grants are specifically designated to support the nine federally recognized Tribes of Oregon.

10. Please highlight some of the key pieces of feedback your office/team received during the engagement process. How did this feedback influence the development of this item? How were differences in opinion accounted for?

During the engagement process, Tribes present at the Government-to-Government Education Cluster and AI/AN Advisory Committee meetings expressed agreement on the need for standalone rules to honor tribal sovereignty and to include Tribal federal indirect rates.

11. Please describe any additional engagement opportunities your office/team will be pursuing prior to asking the Board to take action on this item.

There are no additional engagement opportunities planned at this time prior to asking the Board to take action on this item.

FISCAL AND ADMINISTRATIVE IMPACT ANALYSIS

Equitable resource allocation is a critical component of education equity. Using plain language, this section should describe the fiscal, administrative, and small business impacts of this item, and how it affects the larger social system that serves Oregon's students.

12. After consulting with ODE's Rules Coordinator and Grant Consolidation Team, was this item identified as a grant-related item?

- No

Yes; please review Appendix B: Grant Consolidation below.

13. Will Board action create fiscal or administrative impacts on districts, ESDs, community-based organizations, and/or the nine federally recognized tribes? If so, please describe the anticipated short- and long-term effects and how they may be felt differently in small, rural, or remote communities.

Board action is not expected to create fiscal or administrative impacts on districts, ESDs, or community-based organizations. For the nine federally recognized Tribes of Oregon, allowing Tribal federal indirect rates will have a positive impact by enabling Tribes to recover administrative costs, supporting financial sustainability and flexibility in their early literacy and language preservation efforts.

In small, rural, or remote tribal communities, this policy could have an even more significant effect by addressing longstanding funding disparities and supporting the operational capacity necessary to implement culturally aligned early literacy initiatives. The anticipated long-term effect is an increase in equitable access to resources and improved outcomes for tribal youth, families and tribal communities.

14. Will Board action create a fiscal or administrative impact on state agencies, units of local government, and/or the public? Will it increase costs associated with compliance for small businesses?

Board action will not create a fiscal or administrative impact on state agencies, units of local government, or the public, nor will it increase compliance costs for small businesses.

EQUITY IMPACT ANALYSIS

The State Board of Education envisions an aspirational education system that honors its increasingly diverse student body and affirms every student to reach their full potential in a rapidly shifting global environment. Using plain language, this section should describe the impact of this item on students and the larger social system that serves their health and education needs.

15. How will Board action on this item ultimately impact students and their families, particularly those who have been and continue to be systemically marginalized?

Board action will honor tribal sovereignty by enabling Tribes to lead early literacy efforts that reflect their cultural values and educational goals. This supports historically and currently marginalized tribal youth, families, and tribal communities while uplifting cultural preservation efforts.

16. How will Board action on this item ultimately impact school district employees and volunteers, particularly those who have been and continue to be systemically marginalized?

This item does not impact school district employees or volunteers.

17. What are the anticipated short- and long-term consequences of Board action on this item? Will Board action have a cumulative effect on students, families, educators, districts, or Oregon’s school systems?

Short-term, Board action will establish clear rules that honor tribal sovereignty and support Tribes in implementing early literacy and language preservation programs. Long-term, this will enhance educational outcomes for tribal youth, support cultural preservation efforts, and strengthen partnerships between Tribes and the education system.

18. What are the anticipated short- and long-term consequences of inaction on this item and who would experience those consequences?

Inaction would result in the expiration of temporary rules, preventing Tribes from accessing their indirect costs, which are often higher than other entities. High indirect rates reflect the unique operating costs of cultural programs and services. This could hinder their ability to fully implement early literacy and language preservation programs, negatively impacting tribal youth, families, and tribal communities by reducing resources and support for culturally aligned education efforts.

RECOMMENDED ACTION

The State Board of Education has dedicated itself to challenging the status quo and sharing responsibility for every student’s academic and lifelong success. Using plain language, this section should describe the choice before the Board, the Department’s recommendation, and any other relevant information.

19. Please provide a brief summary of the specific language your office/team is bringing to the Board. Are there any key decisions within this language that your office/team would like the Board to make?

581-017-0805: Amended to include Tribal federal indirect rates, which were not included in the original rule. Temporary rules addressing this were filed in October 2024.

581-017-0807: Amended to establish Tribal Early Literacy grant rules as standalone rules, distinct from the Community Grants rules, in order to honor tribal sovereignty.

The key decision for the Board is to approve these amendments to ensure clarity, fairness, and alignment with tribal sovereignty.

20. How is this language responsive to identified needs and/or feedback received through the engagement process? How is it in alignment with the Board’s Mission, Vision, and Values?

Oregon State Board of Education Docket

The proposed language directly responds to the needs identified during the engagement process by ensuring that the rules honor tribal sovereignty and address the unique challenges faced by Tribes in implementing early literacy and language preservation programs. The inclusion of Tribal federal indirect rates and the establishment of standalone Tribal Early Literacy grant rules reflect feedback from Tribes, who emphasized the importance of sovereignty and the need for greater flexibility. This approach aligns with the Board's mission to provide equitable policies that support the success of every Oregon student, particularly Native students. It also reflects the Board's vision of an education system that honors its diverse student body and ensures that all students, including tribal students, have access to a culturally responsive and effective education. The focus on tribal sovereignty and engagement is in line with the Board's values of centering diversity, equity, and inclusion, as well as valuing the sovereignty of tribal nations in shaping educational policies.

21. Please describe the action your office/team is recommending to the Board (for example, the adoption of rules or the approval of a waiver) and how it reflects the Department's commitment to academic excellence, belonging and wellness, and reimagining accountability.

The Oregon Department of Education, Office of Indian Education recommends that the Board adopt the amended rules for OARs 581-017-0805 and 581-017-0807. These amendments include Tribal federal indirect rates and establish standalone rules for Tribal Early Literacy grants, distinct from Community Grants rules. This action reflects the Department's commitment to academic excellence by ensuring Tribes have the resources and flexibility to implement culturally relevant early literacy programs. It fosters a sense of belonging and wellness by honoring tribal sovereignty and providing support for culturally responsive education that meets the unique needs of Native students. Additionally, this action aligns with reimagining accountability by creating systems that are equitable, transparent, and responsive to the needs and voices of tribal communities, ensuring that policies are inclusive and effectively support student success.

22. Please note any additional support the Department is (or will be) providing to ensure successful implementation of this item.

- N/A; this item does not require any additional support.
- Communications plan
- Technical assistance, professional development, and/or coaching
- Direct or differentiated support for small, rural, or remote school districts
- Corrective Action Processes
- Safety measures
- Organizational culture or practice changes (change management)
- Materials and/or supplies
- Guidance and/or supplemental resources
- Other: _____

Oregon State Board of Education Docket



23. Has this item changed since the last Board meeting?

- N/A; this item has not previously been before the Board
 - No; same as last month
 - Yes; please review Appendix A: Second Reading below.
-

ADOPT: 581-017-0807

RULE TITLE: Early Literacy Tribal Grants

NOTICE FILED DATE: 01/23/2024

RULE SUMMARY: ~~The Early Literacy Tribal Grants require communication and collaboration with the nine federally recognized tribes in Oregon on the co-creation of Project Plans development between each Tribe and ODE. This rule establishes the Early Literacy Tribal Grants program, outlining the eligibility, criteria, funding, and reporting requirements for Sovereign Tribal Nations.~~

RULE TEXT:

~~The Early Literacy Tribal Grants require communication and collaboration with the nine federally recognized tribes in Oregon on the co-creation of Project Plans development between each Tribe and ODE.~~

(1) Establishment of Early Literacy Tribal Grants:

(a) the Early Literacy Tribal Grants program is established in ORS 327.827 to support the nine federally recognized Tribes of Oregon (“Tribes”) in developing and implementing early literacy and language programs that reflect their unique cultural, linguistic, and educational needs, and;
(b) the Oregon Department of Education (“ODE”), Office of Indian Education, shall collaborate with each Tribe to ensure that the development and implementation of the Early Literacy Tribal Grants program reflect tribal sovereignty and the unique cultural, linguistic, and educational needs of each nation.

(2) Eligibility for Early Literacy Tribal Grants:

(a) eligibility for Early Literacy Tribal Grants is limited to the nine federally recognized Tribes of Oregon.

(b) for Tribal Grants, established in ORS 327.843(2)(d), “Eligible Applicant” means:

(a) Burns Paiute Tribe;

(b) The Confederated Tribes of Coos, Lower Umpqua, and Siuslaw;

(c) Confederated Tribes of Cow Creek Band of Umpqua;

(d) Confederated Tribes of Grand Ronde;

(e) Confederated Tribes of Siletz;

(f) Confederated Tribes of Warm Spring Indian Reservation;

(g) Confederated Tribes of Umatilla Indian Reservation;

(h) Coquille Tribe; and

(i) Klamath Tribes.

(3) Criteria for Early Literacy Tribal Grants:

(a) submit Early Literacy Plan that includes the preservation and revitalization of tribal languages, the integration of culturally responsive practices, and the support of family and community engagement in early literacy development, and

(4) Funding for Early Literacy Tribal Grants:

(a) Tribes can access funds based on their proposed project plan, which shall outline the intended use of the funds and the specific early literacy and language initiatives to be implemented, and

(b) Tribes are eligible to apply up to fifteen percent (15%) or the Tribe’s federally recognized indirect rate, as provided in the grant agreement. This rate reflects the unique internal governance

structures and needs of tribes, ensuring alignment with their sovereign status and operational requirements.

(5) Reporting and accountability:

(a) reporting requirements will be flexible, culturally responsive, with minimal administrative burden to the Tribe;

(b) metrics of success for Early Literacy Tribal Grants will be co-developed with each Tribe to reflect each Tribe's unique needs and priorities

(c) reports shall align with Early Literacy and language priorities;

(d) the ODE will customize reports in collaboration with each Tribe's Early Literacy Plan; and

(e) each Tribe will provide a minimum of two reports per biennium.

STATUTORY/OTHER AUTHORITY: ORS 327.829

STATUTES/OTHER IMPLEMENTED: ORS 327.825 to 327.827, ORS 327.843 to 327.845



Early Literacy Tribal Grants Rule Amendment

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Office of Indian Education

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98





Early Literacy Tribal Grants Fix: Program Overview

Overview

- Part of the Early Literacy Success Initiative established under HB 3198.
- Located within the Early Literacy Community Grants section, with specific application to Tribal Grants.
- Provides resources to each of the nine federally recognized tribes of Oregon (“Tribes”).

Key Grant Objectives

- Promote foundational literacy skills and preserve Tribal languages.
- Strengthen family and community engagement in early literacy efforts.
- Honor Tribal sovereignty by allowing each Tribe to design and implement literacy programs that align with their cultural values and priorities.⁹⁹

Early Literacy Tribal Grants Fix: Need for Rulemaking



- The current rule structure does not clearly separate Early Literacy Tribal Grants from Community Grants.
- Tribal sovereignty is not fully honored in the existing framework.
- The amendment seeks to create standalone rules for Early Literacy Tribal Grants, ensuring clearer guidelines and alignment with Tribal sovereignty.
- Inclusion of Tribal federal indirect rates, which were omitted in previous rules, supports tribal financial sustainability.

100



Early Literacy Tribal Grants Fix: Legislative Context

- **HB 3198 (2023)**: Establishes the Early Literacy Success Initiative, which includes Tribal Early Literacy grants.
- **OAR 581-017-0805**: The Early Literacy Community Grant rules did not originally authorize Tribes to access federal indirect costs. Tribes are sovereign nations, distinct from community-based organizations, and were not included in the definition for indirect costs. However, a temporary rule was filed in October 2024 to temporarily authorize the use of Tribal federal indirect rates.
- **OAR 581-017-0807**: Amended to establish Tribal Early Literacy grant rules as standalone rules, separate from Community Grants,¹⁰¹ to better honor tribal sovereignty.

Early Literacy Tribal Grants Fix: Engagement Strategy

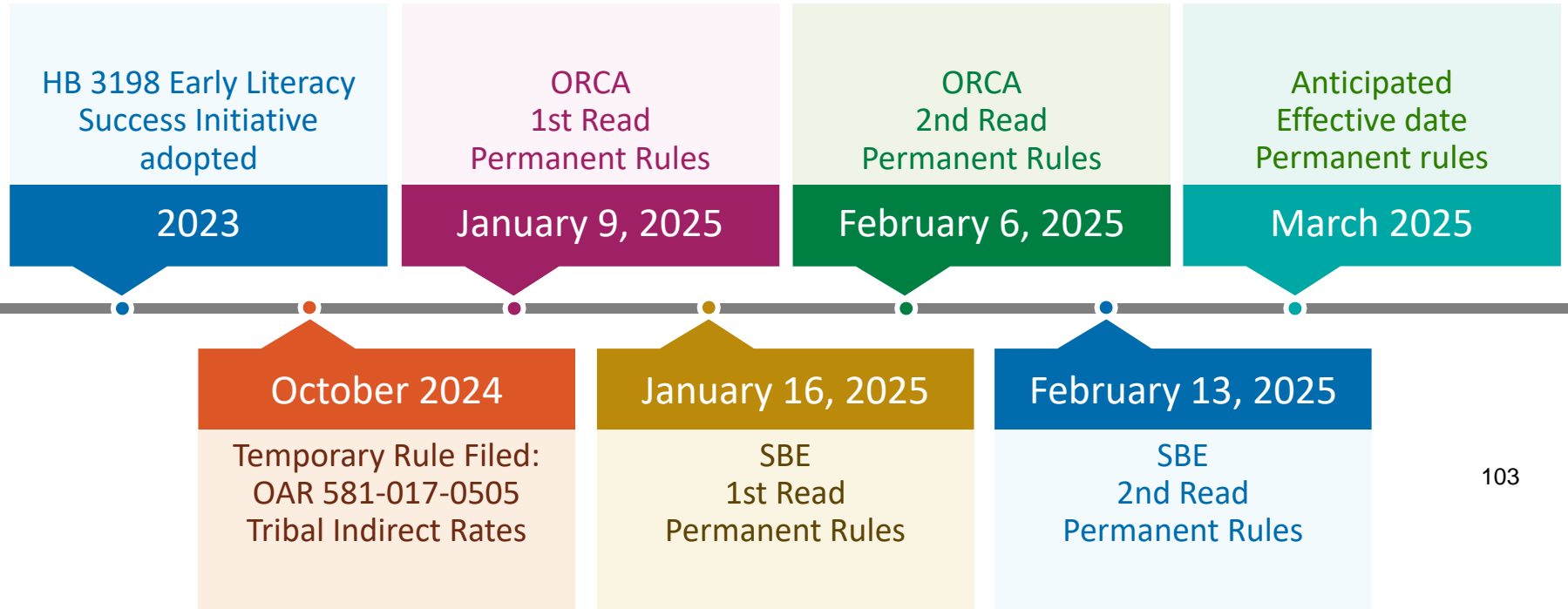


- Internal Early Literacy meetings identified the need for clearer rules for the Tribal Early Literacy Grants.
- Engaged Tribes through informal discussions at the Government-to-Government Education Cluster and the AI/AN Advisory Committee.
- The feedback emphasized the importance of Tribal sovereignty and inclusion of indirect cost rates.

102



Early Literacy Tribal Grants Fix: Timeline



Early Literacy Tribal Grants Fix: Summary of Changes



- **OAR 581-017-0805:** Amended to include Tribal federal indirect rates, which were not accounted for in the original rule. Temporary rules addressing this were filed in October 2024.
- **OAR 581-017-0807:** Amended to establish Tribal Early Literacy grant rules as standalone rules, separate from Community Grants, to honor Tribal sovereignty. The separation of these rules highlights the importance of self-determination in how Tribes manage and implement early literacy programs, reflecting their authority to lead efforts that meet the specific needs of their communities.



Early Literacy Tribal Grants Fix: Equity Impact

- Supports historically and currently marginalized Tribal youth and families.
- Uplifts Tribal sovereignty by allowing Tribes to lead and shape their early literacy programs.
- Ensures that culturally responsive education is accessible to Native students.
- Promotes educational equity by ensuring Tribes can fully utilize available resources, including indirect costs.

105



Early Literacy Tribal Grants Fix: Fiscal Impact

- Positive fiscal impact for Tribes by enabling them to access federal indirect costs.
- No fiscal or administrative impacts on districts, ESDs, or community-based organizations.
- Long-term effect: Better financial sustainability for Tribes, allowing them to effectively implement their early literacy and language preservation programs.

106



Early Literacy Tribal Grants Fix: Discussion

- Are there any other questions or additional feedback to provide?
- **Thank you for your time!**

581-022-2010
Modified Diploma

(1) Definitions. As used in this rule:

(a) “Documented history” means evidence in the cumulative record and education plans of a student that demonstrates the inability over time to maintain grade level achievement even with appropriate modifications and accommodations.

(b) “Instructional barrier” means a significant physical, cognitive or emotional barrier that impairs a student’s ability to maintain grade level achievement.

(c) “Modified course” means a course that has been systematically changed or altered for a student only after reasonable alternative instructional strategies (e.g. accommodations, remediation) are exhausted.

(d) “Other services” for the purposes of this rule means:

(A) Those services paid for or provided by another agency, such as Vocational Rehabilitation or Brokerages, which may be considered in the calculation of the total number of hours that equals at least the total number of instructional hours that is required to be provided to students who are attending public high school. These “other services” are not to be considered educational services and are not provided by or through the school district or public charter school.

(B) Those services identified in OAR 581-022-2320(4), such as school assemblies, student orientations, testing, etc, which may be considered in the calculation of the total number of hours that equals at least the total number of instructional hours that is required to be provided to students who are attending public high school. These services are provided by the school district or public charter school.

(2) On or after July 1, 2009, each district school board or public charter school governing board with jurisdiction over high school programs shall award a modified diploma only to students who have demonstrated the inability to meet the full set of academic content standards for a high school diploma even with reasonable modifications and accommodations but who fulfill all state requirements as described in this rule and all applicable local school district requirements as described in district school board policies or public charter school requirements as described in school policies. In addition, on or after July 1, 2009, a district school board or public charter school governing board may only award a modified diploma to a student who meets the eligibility criteria specified in section 3 of this rule.

(3)(a) Except as provided in paragraph (c) or (d) of this section, a school district or public charter school shall grant eligibility for a modified diploma to a student who has:

(A) A documented history of an inability to maintain grade level achievement due to significant learning and instructional barriers; or

- (B) A documented history of a medical condition that creates a barrier to achievement.
- (b) A student shall have the opportunity to meet the requirements of a modified diploma by the later of:
 - (A) Four years after starting grade nine; or
 - (B) The student reaching the age of 21 years, if the student is entitled to a public education until the age of 21 years under state or federal law.
- (c) A student may complete the requirements for a modified diploma in less than four years if the parent/guardian or adult student gives consent.
 - (A) The consent must be written and must clearly state that the parent/guardian or adult student is waiving the 4 years to complete the requirements for a modified diploma.
 - (B) A copy of all consents must be sent to the district superintendent.
 - (C) Each school district must annually provide the number of consents obtained to the State Superintendent of Public Instruction.
 - (D) The consent may not be used to allow a student to satisfy the requirements for a modified diploma in less than three years.
- (d) A school district or public charter school may not deny a student who has the documented history described in paragraph (a) of this subsection the opportunity to pursue a diploma with more stringent requirements than a modified diploma for the sole reason that the student has the documented history.
- (e) Students currently engaged in the use of illegal drugs are not eligible for a modified diploma if the significant learning and instructional barriers are due to the use of illegal drugs.
- (f) Students currently engaged in the illegal use of alcohol are not eligible for a modified diploma if the significant learning and instructional barriers are due to the alcohol abuse, regardless of whether that student is disabled under Section 504 on the basis of alcoholism.
- (g) Notwithstanding paragraph (c) and (d) of this section, a school district or public charter school may grant eligibility for a modified diploma to a student who is no longer engaging in illegal use of drugs or alcohol if the student:
 - (A) Has successfully completed a supervised drug or alcohol rehabilitation program and are no longer engaged in the illegal use of drugs or alcohol; or
 - (B) Has been rehabilitated successfully and is no longer engaged in the illegal use of drugs or alcohol; or
 - (C) Is participating in a supervised rehabilitation program and is no longer engaging in the illegal use of drugs or alcohol.

(4)(a) A school district or public charter school shall determine which school teams shall decide if a student will work toward obtaining a modified diploma. A student's school team must include an adult student, parent/ guardian of the student.

(b) A school district or public charter school may award a modified diploma to a student only upon the consent of the parent or guardian of the student or upon the consent of the adult student or emancipated minor student. A district or school must receive the consent in writing and during the school year in which the modified diploma is awarded.

(A) If student is under 18, consent must be received from the parent or guardian.

(B) If the student is under age 18 and emancipated, consent must be received from the student.

(C) If the adult student is 18 or older, consent must be received from the student or guardian.

(D) If the student is under guardianship from the courts, consent must come from the court-appointed authority.

(c) Except as provided in subsection (e) of this section, a student's school team shall decide that a student should work toward a modified diploma no earlier than the end of the 6th grade and no later than 2 years before the student's anticipated exit from high school.

(d) For students with a documented history described in subsection 3a of this section, the following information must be provided annually, beginning in grade five or after such a documented history has been established:

(A) Information about the availability of high school diplomas, modified diplomas and the requirements for the diplomas; and

(B) a disclosure that a student awarded a certificate of attendance will not be counted as a high school graduate in any reporting for the state or school district and that the student awarded a certificate of attendance may not indicate that the student received a high school diploma on applications for employment, military service, financial aid, admittance to an institution of higher education or any other purpose.

(e) A student's school team may formally decide to revise a modified diploma decision.

(f) A student's school team may decide that a student who was not previously working towards a modified diploma should work toward a modified diploma when a student is less than 2 years from anticipated exit from high school if the documented history of the student described in section (3) of this rule has changed.

(5) Unit of credit requirements for students graduating with a modified diploma:

(a) To receive a modified diploma prior to January 1, 2027 a student must earn 24 units of credit, between grade 9 and the end of their high school career, with at least 12~~3~~ of those credits to include:

- (A) Language Arts — 3;
- (B) Mathematics — 2;
- (C) Science — 2;
- (D) Social Sciences (which may include history, civics, geography and economics (including personal finance)) — 2;
- (E) Health Education — 1;
- (F) Physical Education — 1; and
- (G) Career Technical Education, The Arts or World Languages (units may be earned in any one or a combination) — 1.

~~(H) Personal Financial Education—0.5; and~~

~~(I) Higher Education and Career Path Skills—0.5~~

(b) To receive a modified diploma after January 1, 2027 a student must earn 24 units of credit, between grade 9 and the end of their high school career, with at least 13 of those credits to include:

(A) Language Arts — 3;

(B) Mathematics — 2;

(C) Science — 2;

(D) Social Sciences (which may include history, civics, geography and economics) — 2;

(E) Health Education — 1;

(F) Physical Education — 1; and

(G) Career Technical Education, The Arts or World Languages (units may be earned in any one or a combination) — 1.

(H) Personal Financial Education – 0.5; and

(I) Higher Education and Career Path Skills – 0.5

(c) School districts and public charter schools shall be flexible in awarding the remaining ~~12~~ units of credit. These credits must be awarded to meet the needs of the individual student as specified in the education plan of the student with the expectations and standards aligned to the appropriate grade level academic content standards. These credits may include:

(A) Additional core credits described in paragraph (a) of this section;

(B) Professional technical education;

(C) Electives; and

(D) Career development.

(~~de~~) Students may earn units of credit through regular education with or without accommodations or modifications and through modified courses.

(~~ed~~) Students shall have the option to earn credit for demonstrating proficiency. A student may be given credit for successful demonstration of knowledge and skills that meets or exceeds defined levels of performance. Students may demonstrate proficiency through classroom work or documentation of learning experiences outside of school, or through a combination of these means.

(~~fe~~) School districts and public charter schools shall ensure that students have access to needed courses, modifications and supports to pursue a modified diploma and to progress in the general education curriculum.

(~~gf~~) A school district or public charter school may not require a student to earn more than 24 units of credit to receive a modified diploma.

(6) A school district or public charter school shall grant credit toward a modified diploma only for courses that contain substantial academic content. A school district or public charter school shall grant credit for a modified diploma through a continuum of instruction beginning at basic skills and progressing through high level skills.

(7) A school district or public charter school shall award a regular diploma under OAR 581-022-2000 if all requirements for a regular diploma are met. Completion of one or more modified courses shall not prohibit a student from earning a regular diploma; however, required core courses taken under modified conditions must be retaken under standard conditions to be counted toward a regular diploma.

(8) A school district or public charter school shall grant credit toward a modified diploma according to individual student needs across academic content areas including applied, consumer, academic, or knowledge and skill development.

(9) Each student shall develop an education plan and build an education profile as provided under OAR 581-022-2000.

(10) A school district or public charter school shall inform the student and parent or guardian of the student if the courses in grades 9-12 have been modified for an individual student.

(11) A school district or public charter school shall provide transcripts which clearly identify modified courses that do not count toward the regular diploma but that do count toward a modified diploma.

(12) Each student shall build a collection of evidence, or include evidence in existing collections, to demonstrate extended application of the standards as defined in OAR 581-022-0102.

(13) Each student receiving a modified diploma shall have the option of participating in the high school graduation ceremony with the members of their class receiving a high school diploma.

(14)(a) A student who receives a modified diploma shall have access to instructional hours, hours of transition services and hours of other services that are designed to meet the unique needs of the student.

(b) When added together, the school district or public charter school will provide a total number of hours of instruction and services to the student that equals at least the total number of instructional hours that is required to be provided to students who are attending a public high school.

(c) The school district or public charter school may not unilaterally decrease the total number of hours of instruction and services to which the student has access regardless of the age of the student.

(d) Transition services and other services designed to meet the unique needs of the student may be provided to the student through an interagency agreement entered into by the school district if the individualized education program developed for the student indicates that the services may be provided by another agency. The school district or public charter school retains the responsibility for ensuring that the student has access to the number of service hours required to be provided to the student.

(e) An agency is not required to change any eligibility criteria or enrollment standards prior to entering into an interagency agreement with the school district.

(f) School districts and public charter schools shall ensure that all students have on-site access to the appropriate resources and courses to achieve a modified diploma at each high school in the school district or at the public charter school.

~~(15) The unit of credit requirements in section (5)(h) & (i) of this rule for a modified diploma apply to all students who are awarded a modified diploma on or after January 1, 2027.~~

Oregon State Board of Education

January 16, 2025

AGENDA ITEM: 5.B.

<p>SUBJECT: OAR 581-022-2010 Modified Diploma (technical fix regarding implementation date)</p> <p>STAFF NAME & OFFICE: Aujalee Moore, Beth Wigham, Vanessa Martinez - Office of Teaching, Learning, and Assessment.</p> <p>With the passage of Senate Bill 3, beginning with the class of 2027, the Oregon diploma requirements will include 0.5 credit in Personal Financial Education and 0.5 credit in Higher Education and Career Path Skills. The proposed technical fix is necessary to clarify the implementation date for updated modified diploma requirements outlined by Senate Bill 3 (2023).</p> <p><input type="checkbox"/> New Rule <input checked="" type="checkbox"/> Amend Existing Rule <input type="checkbox"/> Repeal Rule</p>	<p>X First Reading</p> <p><input type="checkbox"/> Presentation X No Presentation</p> <p><input type="checkbox"/> Action</p> <p><input type="checkbox"/> Temp Rule <input type="checkbox"/> Presentation <input type="checkbox"/> No Presentation</p>
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BACKGROUND

[Senate Bill 3](#), requiring a 0.5 credit in Personal Financial Education and a 0.5 credit in Higher Education and Career Path Skills, received broad support from educators, parents, students, and business and community partners in the 2023 legislative session. In June 2023, the Oregon Legislature passed, and Governor Kotek signed Senate Bill 3. Together, this new legislation and the Senate Bill 744 community-informed recommendations for graduation requirements provide momentum to help create more equitable, inclusive, and accessible diploma requirements.

Beginning with the class of 2027, the Oregon diploma requirements will include a 0.5 credit in Personal Financial Education (PFE) and a 0.5 credit in Higher Education and Career Path Skills (HECPS), as part of the existing 24 credit requirements. The implementation of these new credit requirements necessitated the development of new standards designed to support students in developing skills they will need to be successful in their future lives.

Senate Bill 3 updated ORS 329.451 with the aforementioned credit requirements and authorized the State Board of Education to adopt by rule requirements for courses, including teachers of courses, that allow the courses to satisfy multiple credit requirements for a high school diploma, including mathematics.

SUMMARY OF PREVIOUS BOARD ACTION

Temporary rules and processes for the updated diploma requirements were adopted in June 2024.

In October 2024, the Oregon State Board of Education adopted permanent rules related to the new diploma requirements.

After adoption by the Board in October, ODE received additional feedback from public charter schools and districts serving students who will be receiving modified diplomas. The feedback included the following:

- There was a clerical error in OAR 581-022-2010 Modified Diploma which creates inconsistencies in implementation expectations for districts.

Updated language seeks to clarify the requirements for students graduating with a modified diploma on or after January 1, 2027 while maintaining the current requirements for students graduating with a modified diploma prior to the aforementioned date.

Oregon State Board of Education

January 16, 2025

AGENDA ITEM: 5.B.

HAS THE RULE CHANGED SINCE LAST BOARD MEETING?

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

No; same as last month

Yes – As follows:

POLICY ISSUE OR CONCERNS

Members of the education community that work with students receiving modified diplomas have requested clarity in language around the implementation of Senate Bill 3 requirements. The policy is not functionally changing with this edit, but is clarifying the expectations for districts.

EQUITY IMPACT ANALYSIS

The passing of Senate Bill 3 highlights the impact that knowledge and skill-building for future planning and personal finance can have on the success of future generations. Historically, this information has been provided to some students through elective courses which are not offered by all districts. This has led to reported disproportionalities for underserved student groups in postsecondary access and completion, as well as inequalities within workforce systems. The requirements established by SB 3 provide students with access to the key concepts needed for navigating systems that have previously benefited some over others.

SB 3 creates a requirement that applies to all students graduating in the state of Oregon and takes the approach of helping students understand and navigate systems that have privileged white and middle class families for generations. The process of implementing SB 3 includes the creation of content standards related to future planning. Together, the rules and standards provide a baseline for instruction that all students in Oregon are required to receive. Previously, only the schools that had the funding to prioritize offering these courses as electives were providing the full scope of personal financial education to their students. Many other schools have limited personal financial education to the Social Science standards which are not as comprehensive as a full course. Senate Bill 3 and the proposed rule revisions provide more equitable access to knowledge that may have not been available across generations for historically and currently underserved students by establishing requirements regarding Higher Education and Career Path Skills and Personal Financial Education.

FISCAL ANALYSIS

School districts may be fiscally impacted as they may need to:

- secure additional staffing to meet the new requirements;
- procure materials to teach the course;
- provide educators with professional learning (including FTE as needed).

Other stakeholders that may benefit fiscally from the new requirements include publishers of instructional materials and providers of professional learning which may include financial institutions.

EFFECT OF A "YES" OR "NO" VOTE

A "YES" vote will result in the permanent adoption of a revised OAR 581-022-2010 to support the implementation of updates to ORS 329.45 outlined in Senate Bill 3 (2023).

A "NO" vote will reject revisions to OAR 581-022-2010 to support the implementation of updates to ORS 329.45 outlined in Senate Bill 3 (2023).

STAFF RECOMMENDATION

Approve X Approve next month No recommendation at this time

Prompted by: X State law changes Federal law changes other

Oregon State Board of Education

January 16, 2025

AGENDA ITEM: 5.B.

ATTACHMENTS

Attachment 1: OAR 581-022-2010 with Tracked Changes

PROPOSED RULE REVISIONS—September 5, 2024

581-017-0729

Intensive Program & Student Success Teams: Definitions

The following definitions apply to OAR 581-017-0729 to 581-017-0744:

(1) “Advisory ~~Members~~Body” means the entity which may include the following members: Education Service District staff, additional Department staff, district contracted personnel, additional district educators (principals, teachers and paraprofessionals), students, ~~and~~ family, caregivers, and community members as defined by OAR 581-017-0729 (X).

(X) “Collaboration and Coordination” means activities and expenses that help the participating school district and the Department coordinate the program.

(X) “Community Member” means:

(a) a representative of a community-based organization, as defined by OAR 581-017-0550, that serves the local community;

(b) a representative of a culturally specific organization, as defined by OAR 581-017-0550, that serves the local community;

(c) a representation of an organization that regularly partners with the school district to network resources and assist students in meeting state and local standards, and prepare students for post high school transitions;

(d) a resident of the local community capable of representing underserved community voices, as defined by OAR 581-017-0550, or

(e) a resident of the local community capable of representing community voice, as defined by OAR 581-017-0550.

(2) “Community Steward” means the person designated by the Department who, among other things, brings expertise and experience in developing relational and operational community agreements aimed at fostering shared accountability for changing practice, policy and experiences.

(3) “Department” means the “Oregon Department of Education”.

(X) “District Point Person” means the designated school district employee who will support implementation of the program for the participating school district.

(4) “Focal Student Group” means the specific groups of students outlined in ORS 327.180(2)(b).

(5) “Initial Allocation” means the formula allocation developed for a participating school district for the first year of the program.

(6) “Leadership Steward” means the person designated by the Department who, among other things, brings expertise and experience in transformational education leadership aimed at dismantling structures of systemic oppression.

(7) “ODE Point Person” means the designated, full-time Department employee who will serve on the Student Success Team.

~~(8) “Planning Phase” means the period of time dedicated to establish the Student Success Team.~~

~~(9) “Public Charter Schools” means an elementary or secondary school offering a comprehensive instructional program operating under a written agreement entered into between a sponsor and an applicant and operating pursuant to ORS 338.~~

(10) “School Districts” means an Oregon common school district, joint school district, or union high school district.

~~(11) “Sovereign Nation” means designated representation from one of Oregon’s nine Federally recognized Native American tribes.~~

(12) “Stewarding MembersBody” are is the decision-making entity of the Student Success Team which must include the following members: the ODE point person, the Leadership Steward, the Teaching and Learning Steward, the Community Steward, the district superintendent, a school board member or community member, and a classroom teacher.

(13) “Student Success Team” includes both the Stewarding Body and Advisory Body~~means the group of Stewarding Members and the group of Advisory Members.~~

(14) “Teaching and Learning Steward” means the person designated by the Department who, among other things, brings deep knowledge and expertise in culturally responsive, sustaining and inclusive instructional practices.

(15) “Total Allocation” means the ~~four-year~~ total grant ~~in aid~~ distributed to a participating district over their participation in the program given available funds. factoring in available funds for the entire program and participating districts.

581-017-0732

Intensive Program & Student Success Teams: Purpose

(1) The purpose of the intensive program is to assist school districts with the highest needs.

(2) For the purpose of assisting school districts participating in the intensive program, a Leadership Steward, a Teaching and Learning Steward, and a Community Steward will work with local personnel as part of the Stewarding MembersBody of the Student Success Team.

581-017-0735

Intensive Program & Student Success Teams: Eligibility

(1) The Department will review district demographic data and student outcome data to determine which school districts are most in need of additional support in the form of Student Success Teams. Districts who fall into the bottom quartile of the index will be eligible for invitation.

(2) The Department will develop a list of eligible districts once per biennium.

~~(3) Public Charter Schools are not eligible to participate or receive funding.~~

581-017-0738

Intensive Program & Student Success Teams: Criteria, Agreement and Establishing Improvement

(1) The department will prioritize districts with the greatest need as determined by a review of data. ~~Districts with the highest need will receive priority.~~ Given available resources, the department will determine the number of districts to include in the program.

(2) The Department will invite a minimum of three school districts and no more than 10 districts per biennium.

(3) Acceptance of the invitation requires:

(a) ~~Participation in the program for a minimum of four years;~~

~~(x) Execution of a grant agreement to receive grant-in-aid:~~

~~(A) Grant-in-aid will continue until June 30th of the participating district's final school year of program participation; Four-year participation in the program that starts with the execution of grant agreements for additional funding; and~~

~~(x) Including the Intensive Program into district requirements to engage in Tribal Consultation with Tribal Nations, for affected districts under Section 8538 of the Every Student Succeeds Act;~~

~~(x) Commitment to scheduling and supporting regular Student Success Team meetings;~~

~~(x) Ensuring that the decision-making process of the Stewarding Body centers students' perspectives, including represented focal student groups, as appropriate given the district's demographics.~~

~~(b) Commitment to membership and representation on the Student Success Team, whether by formal participation or through consultation, the experiences of the following perspectives, where applicable, must be included in decision-making considerations by the group of Stewarding Members:~~

~~—— (A) Focal student groups~~

~~—— (B) General student body~~

~~—— (C) Sovereign nation leadership~~

~~(x) Identifying a District Point Person to support the Intensive Program within the district for each year of participation;~~

(c) Acceptance and implementation of the recommendations of the Student Success Team pursuant to terms outlined in ORS 327.222.

(4) At the end of the fourth year of participation, four years, participating school districts will have demonstrated improvement when:

(a) The Student Success Team determines the district has made progress in achieving the stated outcomes outlined in the district's Aligning for Student Success integrated plan;

(b) A needs assessment, including community engagement, indicates that sufficient progress has been made;

(c) The school board and Student Success Team have established a sustainability plan to maintain and build on the progress and improvements made; and

(d) Student outcome data has improved since initial identification as measured by:

(A) Initial eligibility data; or

(B) The district is on-track to meet their longitudinal performance growth targets outlined in their Student Investment Account grant agreement.

(5) Whether a participating district has demonstrated improvement will be determined by a progress monitoring tool created by the Department using the criteria outlined in OAR-581-017-0738 (4).

(6) At the end of the fourth school year of participation, the Student Success Team may request that the district remain in the Intensive Program until the completion of the current fiscal biennium if the district has not yet demonstrated improvement.

~~(a) Student outcome data has improved to a point where the district would not be eligible for the program; and~~

~~—(b) The Student Success Team determines the district has made progress in achieving the stated goals; and~~

~~—(c) A community assessment indicates that sufficient progress has been made; and~~

~~—(d) The school board and success teams have established a sustainability plan to preserve the progress and improvements made.~~

581-017-0741

Intensive Program & Student Success Teams: Funding

(1) The Initial Allocation will be determined as follows:

(a) Available funds will be distributed at a rate of \$300 / ADMw.

(b) The maximum allocation a district will receive will not exceed \$5,000,000.

(c) The minimum allocation a district will receive will not fall below \$500,000.

(2) The Total Allocation for the four years will be determined using a tapered distribution over the course of four years.

(3) Additional funding for subsequent years of participation will be determined based on the district's need to sustain existing initiatives and the available grant-in-aid funds available for the program.

(4) The Department will provide additional funds to each participating district on an annual basis to support collaboration and coordination of the program at the district level.

(a) The Department will determine additional funding to participating districts only if there are available programmatic funds;

(b) Each district's funding allocations will be based on a calculation determined by the Department;

(c) These funds are part of the participating district's Total Allocation;

(d) These funds will be available for the duration of the district's participation in the program;

(e) The participating district shall ensure that these funds are spent in accordance with federal and state law as well as Department guidance to support collaboration and coordination; and

(f) These funds are not required to be approved as a formal recommendation by the Stewarding Body.

~~(3) A portion of the Initial Allocation of at least \$50,000 but not to exceed 5% of the participating district's Initial Allocation may be used to support coordination and collaboration in the Planning Phase between The Department and the participating district.~~

~~(54) With the exception of the collaboration and coordination funds referenced in 581-017-0741(3), all remaining funds will be spent in accordance with recommendations from the Student Success Teams, including whether or not to sustain the expenditures for coordination and collaboration in subsequent years of participation.~~

581-017-0744

Intensive Program & Student Success Teams: Reporting

Participating school districts must provide reports in the manner and form required by the Department and in accordance with ORS 327.222.

Summary

Meeting Date: 1/16/2025

Title: Technical Fix: Intensive Program

Status: First Reading

Presentation: No (Written Report Only/Consent)

Key Staff: Haedon Brunelle, Tim Boyd, Sarah Dey, Chelsea Mabie

Topic Summary: Due to a clerical filing notice error, rules relating to the Intensive Program Rules need to return for a temporary vote for adoption at the January 16, 2025, State Board meeting. These rules initially passed on December 5th, 2024, but cannot be filed for adoption as the error didn't provide the required 51-day filing notice. These proposed rules are returning to the Board as a temporary rule for districts to access as soon as possible, and to serve as a 1st reading for the Board, so that a 2nd reading may be held for permanent adoption in February.

ODE Education Equity

Stance

Education equity is the equitable implementation of policy, practices, procedures, and legislation that translates into resource allocation, education rigor, and opportunities for historically and currently marginalized youth, students, and families including civil rights protected classes. This means the restructuring and dismantling of systems and institutions that create the dichotomy of beneficiaries and the oppressed and marginalized.

BACKGROUND AND NEED

Members of the State Board of Education are volunteers, with unique professional and lived experiences. Using plain language, this section should provide context for this item, including any needed overviews of relevant programs or initiatives.

1. Briefly, how does this topic, program, or initiative currently operate? Where is it located within Oregon's school systems? How does it ultimately serve students?

The Intensive Program provides funding and support to the districts with the highest needs. Districts are selected through a combination of student outcomes and student demographic data. Currently, the program has four participating districts and will invite additional districts in early 2025. The anticipated start date for this newest cohort is July 1, 2025.

Designed as a collaborative partnership model between the district and ODE, the Intensive Program provides a systems approach through the following:

- **Student Success Team:** The Student Success Team works collaboratively with district staff, ODE staff, community members, contracted stewards, and others to make binding recommendations to improve district practice, funding, and outcomes.
- **Stewards:** Each district is assigned three stewards who bring external perspectives and deep knowledge and skills in the focal areas of leadership, teaching and learning, and community engagement. Stewards work to build trust and leverage dispositions of

transformational leaders in order to attend both to climate and culture challenges as well as instructional practices.

- **ODE Internal Alignment:** Staff from across the Agency meet regularly to support Intensive Program districts in an effort to examine ways to reduce burden, align processes, and reexamine policy to dismantle systems that are detrimental to student and district success.

The Stewarding Body formally approves recommendations which have been vetted by the Advisory Body. Districts must accept and implement any recommendations connected to grant-in-aid associated with the program, as well as Student Investment Account monies. Recommendations are specific to district system needs; recommendations from current districts range from starting new CTE pathways to district community engagement assessments. Current impacts of recommendations can be felt from the classroom level (e.g. infusing educational assistants to support early literacy initiatives), to the building level (e.g. hiring Climate and Culture TOSAs at each elementary school to support building a positive climate and culture), to district levels (e.g. reviewing assessments and audits to support reflection on current systems).

2. Please list the specific rule(s), statute(s), or recently passed legislation that allows the Board to take action on this item. Where are they prescriptive and where do they provide the Board and Department flexibility?

ORS 327.222– Student Investment Account, Intensive Program. Statute provides an outline for the Intensive Program, but ODE staff do not anticipate any key decision points in these proposed rule changes to conflict with statute.

OAR 581-017-0732 through 0744 – Intensive Program rules

3. Has this item come before the Board before? If so, when did the Board last take action, and what was that action?

The Intensive Program ruleset was initially adopted by the State Board of Education on January 28, 2021. Out of the proposed changes, only the one related to collaboration and coordination funds has been the focus of additional rulemaking. The proposed rule changes would move collaboration and coordination funds from being a portion of the district’s initial allocation to additional funding that all districts receive. Additional funding will particularly support small districts whose program allocation is limited.

- 9/22/21- State Board adopted temporary rules allowing collaboration and coordination funds to support implementation of the program.
- 3/25/22- State Board adopted the same rules as permanent.
- 6/23/22- State Board adopted a minor language change related to collaboration and coordination funds, specifying that they would be used during the planning phase of the program.

Oregon State Board of Education Docket

4. Why is this item coming before the Board now?

While the State Board of Education approved these rules at the December 5, 2024, State Board of Education meeting, these rules could not be filed for adoption as a filing notice occurred. Meaning these rules did not issue a 51-day notice through the Secretary of State's Office as required by law, and therefore could not be filed for permanent adoption. This item is returning to the State Board of Education as a temporary rule, and as a 1st read for permanent adoption in February, as the rules have now received a rule notice. Below is language from the December docket for this ruleset:

The Intensive Program is at a key moment in implementation. Our first participating district is just over halfway through their four year partnership. This district will begin examining exit criteria and what continued support could look like in the spring of this school year. Current rules outline how improvement is measured, with both participating districts as well as districts that have declined invitation, requesting additional clarity in this area. Since implementation began, the Agency has moved forward the Aligning for Student Success Integrated Plan. The Student Investment Account is a key component of the Integrated Application, so finding ways to align implementation and rule to reduce burden for districts is a pillar the Intensive Program wants to uphold. Updating exit criteria, as well as definitions, to align with the Integrated Application ahead of the first district exiting the program has provided the urgency to come to the Board now. In addition, the team is preparing to invite the next round of districts in early 2025. Having rule sets that incorporate the needed shifts from what the program has learned with the first two cohorts of districts, as well as providing greater clarity around how improvement is measured, feel essential in helping invited districts have the greatest clarity around the program they are considering opting into.

5. Who requested or brought about the need for this item? (Select all that apply.)

- ODE Staff
- Students
- Families
- Community-Based Organizations
- Culturally Specific Organizations
- School Districts
- Education Service Districts
- Charter Schools
- Oregon State Legislature
- Educational Associations
- Racial Justice Council
- Federal Government
- One or more of Oregon's nine federally recognized tribes: _____
- Other: _____

ENGAGEMENT STRATEGY AND LEARNINGS

The State Board of Education expects all items that come before it be reviewed and influenced, to the greatest extent possible, by a robust community engagement process. Using plain language, this section should provide an overview of the role that engagement played in this item, including with Oregon’s nine federally recognized Tribes, other state agencies, and external partners.

6. How did the [Equity Decision Tree](#) inform your office/team engagement strategy? Who is most likely to be affected and how have they been intentionally incorporated into the engagement process for this item?

From the Equity Decision Tree, one of the most important questions that we considered as we planned our engagement around the proposed rule changes was how to solicit feedback in a way that builds relationships and creates a deeper sense of community. We knew that participating and invited districts were most likely to be affected as well as tribal communities in at least one participating district. We intentionally incorporated these districts as well as the Office of Indian Education in multiple rounds of engagement and ensured that their feedback was fully integrated into the proposed changes.

7. After consulting with ODE’s Rules Coordinator and the Office of Indian Education, did this item require Tribal Consultation and/or Tribal Communication with Oregon’s nine federally recognized tribes? (For more information, please reference ODE’s [Tribal Consultation Toolkit](#).)

- No
- Yes – Both Consultation and Communication.
- Yes – Only Communication.

8. Has your office/team considered how this item intersects with the authority of other state entities that serve the health and education needs of Oregon’s students, or otherwise contribute to the climate of Oregon’s school systems? If so, please select from the below list.

- N/A; this item does not intersect with other state entities.
- Oregon Health Authority (OHA)
- Department of Early Learning and Care (DELIC; formerly ELD)
- Educator Advancement Council (EAC)
- Higher Education Coordinating Commission (HECC)
- Youth Development Oregon (YDO)
- Teacher Standards and Practices Commission (TSPC)
- Oregon Housing and Community Services (OHCS)
- Other: _____

9. Which geographic perspectives are intentionally represented in your office/team engagement strategy?

- Northeast Oregon

Oregon State Board of Education Docket

- Central and Southeast Oregon
- Southwest Oregon
- Willamette Valley and Central Coast
- Northwest Oregon
- Tribal lands
- Other: _____

Why did your office/team focus on the above geographical perspective(s)?

10. Please highlight some of the key pieces of feedback your office/team received during the engagement process. How did this feedback influence the development of this item? How were differences in opinion accounted for?

The Intensive Program did multiple rounds of engagement with staff within the Office of Education Innovation and Improvement, the Office of Indian Education, the ORCA (early concept and first read), and with participating districts and steward contractors. During these engagement sessions with partners, common trends in feedback emerged:

- Strong support to allow continued participation beyond the statutorily required four years for districts, without a pause.
- A need to clarify how improvement will be measured and named in rule.
- Strong support for providing funding specifically for collaboration and coordination to strengthen implementation, especially in small districts.
- A need to refine definitions, and make small edits, to provide greater clarity for both participating districts as well as those invited.

The consistency in feedback helped prioritize areas of rules to refine as well as which areas of current rule sets needed greater clarity.

11. Please describe any additional engagement opportunities your office/team will be pursuing prior to asking the Board to take action on this item.

The team returned to the ORCA for a second read. ODE’s Rules Coordinator will update the ORCA on the filing error, temporary rule status, and new plan to pass these rules. No additional engagement opportunities are anticipated at this time.

FISCAL AND ADMINISTRATIVE IMPACT ANALYSIS

Equitable resource allocation is a critical component of education equity. Using plain language, this section should describe the fiscal, administrative, and small business impacts of this item, and how it affects the larger social system that serves Oregon’s students.

12. After consulting with ODE’s Rules Coordinator and Grant Consolidation Team, was this item identified as a grant-related item?

- No
- Yes; please review Appendix B: Grant Consolidation below.

13. Will Board action create fiscal or administrative impacts on districts, ESDs, community-based organizations, and/or the nine federally recognized tribes? If so, please describe the anticipated short- and long-term effects and how they may be felt differently in small, rural, or remote communities.

Proposed Change: Collaboration and Coordination Funds: We anticipate that this change, which moves collaboration and coordination funds from a percentage of the district's initial allocation to additional funding, will have a positive fiscal impact on districts, especially small districts whose grant funds were significantly reduced by collaboration and coordination expenses.

Proposed Change: Aligning Tribal Consultation with Current Requirements: The Office of Indian Education requested that we align tribal consultation requirements for participating districts with existing ESSA requirements with the intention of reducing fiscal and administrative burden on tribes and districts.

14. Will Board action create a fiscal or administrative impact on state agencies, units of local government, and/or the public? Will it increase costs associated with compliance for small businesses?

ODE staff do not anticipate a fiscal or administrative impact on any of these entities, including small businesses.

EQUITY IMPACT ANALYSIS

The State Board of Education envisions an aspirational education system that honors its increasingly diverse student body and affirms every student to reach their full potential in a rapidly shifting global environment. Using plain language, this section should describe the impact of this item on students and the larger social system that serves their health and education needs.

15. How will Board action on this item ultimately impact students and their families, particularly those who have been and continue to be systemically marginalized?

Proposed Change: Collaboration and Coordination Funds: We anticipate that this change will have an outsized importance for small and rural school districts whose limited funding can be a barrier to supporting students and their families, especially those who are systemically marginalized.

Proposed Change: Aligning Tribal Consultation with Current Requirements: The intent of this proposed change to the program's approach to tribal consultation is to lessen the burden and deepen the engagement for both tribes and participating districts in order to allow both entities to better serve students and families.

Oregon State Board of Education Docket



Proposed Change: Exit Criteria: The Integrated Application hones in on four key goals and outcomes around them. By aligning exit criteria to those in the district’s Integrated Application, we’re both directing the district to focus on what we believe will support students and families, especially those who are systemically marginalized, as well as alleviating the burden of districts’ addressing multiple sets of outcomes.

16. How will Board action on this item ultimately impact school district employees and volunteers, particularly those who have been and continue to be systemically marginalized?

We anticipate that these proposed changes will result in less administrative burden and more fiscal resources to support school districts and their employees.

17. What are the anticipated short- and long-term consequences of Board action on this item? Will Board action have a cumulative effect on students, families, educators, districts, or Oregon’s school systems?

ODE staff anticipate minimal short term impacts with the most significant being that participating districts will receive additional funds to support collaboration and coordination.

ODE staff anticipate more significant long-term impacts including: reduced administrative burden for participating districts and tribes through aligned requirements and exit criteria, strengthened collaboration and coordination between participating districts and the Department through the additional funds, and, ideally, stronger district, community, and student outcomes as a result of these changes.

18. What are the anticipated short- and long-term consequences of inaction on this item and who would experience those consequences?

If the proposed changes are not adopted, the Intensive Program will likely have a more limited impact on participating districts and communities by duplicative requirements, processes, and outcomes and limited funding to support collaboration and coordination.

RECOMMENDED ACTION

The State Board of Education has dedicated itself to challenging the status quo and sharing responsibility for every student’s academic and lifelong success. Using plain language, this section should describe the choice before the Board, the Department’s recommendation, and any other relevant information.

19. Please provide a brief summary of the specific language your office/team is bringing to the Board. Are there any key decisions within this language that your office/team would like the Board to make?

Proposed Change: Collaboration and Coordination Funds: ODE staff drafted language to allow for collaboration and coordination funds, if there are available programmatic funds. Also, the

Oregon State Board of Education Docket



language specifies that these funds— and only these funds— are not required to be approved as a recommendation by the Stewarding Body.

Proposed Change: Aligning Tribal Consultation with Current Requirements: ODE staff consulted OIE on this language and copied the language related to tribal consultation requirements in other areas of rule.

Proposed Change: Refining and Aligning Exit Criteria: ODE staff reordered the existing exit criteria to prioritize the outcomes in the district’s Aligning for Student Success integrated plan and provided more specifics across all criteria.

Proposed Change: Allowing Districts to Participate Beyond Four Years: Current rule restates statute: districts must remain in the program for a minimum of four years. ODE staff proposed changing the rule to allow a participating district’s Student Success Team to request staying in the program until the end of the fiscal biennium if the district has not yet demonstrated improvement. This would allow the district, if needed, to be reinvited into the next cohort at the end of the current biennium and ensure that support was continuous.

Proposed Change: Minor and Conforming Edits: Additional edits include minor language changes to definitions and requiring districts to identify a district point person.

20. How is this language responsive to identified needs and/or feedback received through the engagement process? How is it in alignment with [the Board’s Mission, Vision, and Values](#)?

Discussions with and among participating districts, invited districts, OIE, and Intensive Program staff spurred these proposed rule changes which are deeply aligned to the Board’s equity-oriented mission, vision, and values. After multiple years of implementation, ODE staff recognized a need to adapt and innovate the current program to be more responsive to district needs, especially those serving systemically marginalized students and families. Engagement has reiterated these needs, and the proposed rule changes speak to the iterative and innovative nature of the program adjusting to current needs of districts in real-time.

21. Please describe the action your office/team is recommending to the Board (for example, the adoption of rules or the approval of a waiver) and how it reflects the Department’s commitment to academic excellence, belonging and wellness, and reimagining accountability.

Following the second reading of these proposed rule changes, ODE staff recommend adoption of this item. One of the Department’s key priorities is reimagining accountability, and the Intensive Program— and specifically these proposed changes— are deeply in alignment with the vision of this work: a vision that centers shared accountability for the success of students and families.

Oregon State Board of Education Docket

22. Please note any additional support the Department is (or will be) providing to ensure successful implementation of this item.

- N/A; this item does not require any additional support.
- Communications plan
- Technical assistance, professional development, and/or coaching
- Direct or differentiated support for small, rural, or remote school districts
- Corrective Action Processes
- Safety measures
- Organizational culture or practice changes (change management)
- Materials and/or supplies
- Guidance and/or supplemental resources
- Other: _____

23. Has this item changed since the last Board meeting?

- N/A; this item has not previously been before the Board
- No; same as last month
- Yes; please review Appendix A: Second Reading below.

APPENDIX A: SECOND READING

Appendix A should only be completed if "yes" is selected for question 23. Using plain language, this section should provide a summary of any additional engagements, learnings, or changes that have occurred since the First Reading of this item.

1. Please describe any additional engagement opportunities your office/team has pursued since the First Reading of this item. Which perspectives were intentionally included?

Since the First Reading of this item, we presented to the ORCA on November 7th. We did not receive any additional feedback.

2. Has your office/team received any additional public comment on this item? If so, who provided that comment and what feedback did they provide?

No.

3. Please describe any overall learnings that have occurred since the First Reading of this item. How were differences in opinion accounted for?

We have not received any new learnings, but the Intensive Program staff have heard repeatedly from participating districts who are eager for news of the passed rules.

Oregon State Board of Education Docket



4. Please provide a brief summary of the changes your office/team have made to this item since the First Reading. How are these changes responsive to identified needs and/or feedback received through the engagement process?

N/A

APPENDIX B: GRANT CONSOLIDATION

Appendix B should only be completed if "yes" is selected for question 12. Using plain language, this section should provide additional detail on how grant rules have been aligned and designed to support districts and meet administrative needs.

1. Please indicate which of the following underlying processes are required for this grant program.

- Conduct a needs assessment
- Gather and provide additional data
- Submit an application to ODE
- Submit a report to ODE
- Submit a plan to ODE
- Submit a budget to ODE
- Conduct community engagement
- Other: _____

2. How has your team/office worked to encourage more equitable resource allocation and address administrative impacts, particularly for small or rural school districts? How has this grant been aligned with existing grant programs?

Updates to 581-017-0738 Intensive Program & Student Success Teams: Criteria, Agreement and Establishing Improvement are specifically intended to address administrative impacts for districts. Namely, the focus on how schools demonstrate improvement (exit criteria) proposed language is aligned with processes and tools required in the Aligning with Student Success Application. The intention is for districts to incorporate the work they are already undertaking for that application into the Student Success Team as a means to demonstrate progress for the Intensive Program.

The inclusion of coordination and collaboration funds will positively impact all districts during implementation but will be especially helpful for small or rural participants. Currently, our smallest district is setting aside nearly a quarter of their grant-in-aid to support implementation work through staffing a District Point Person. By freeing up specific funds to support implementation, more grant-in-aid can be used to support initiatives in these districts that support students and community

3. How are the grant requirements differentiated for small and rural school districts?

Oregon State Board of Education Docket



The Intensive Program rules currently include floor funding for grant-in-aid for the smallest districts since the amount of funds they would receive per their ADMw calculation would be very limited. As mentioned above, the shift in coordination and collaboration funding for implementation is particularly important for supporting small and rural districts. Beyond funding amounts, grant agreements are the same for small or rural schools as larger districts. However, implementation for each district is specific to their context. For example, the advisory body size is adjusted and right sized for the district size.



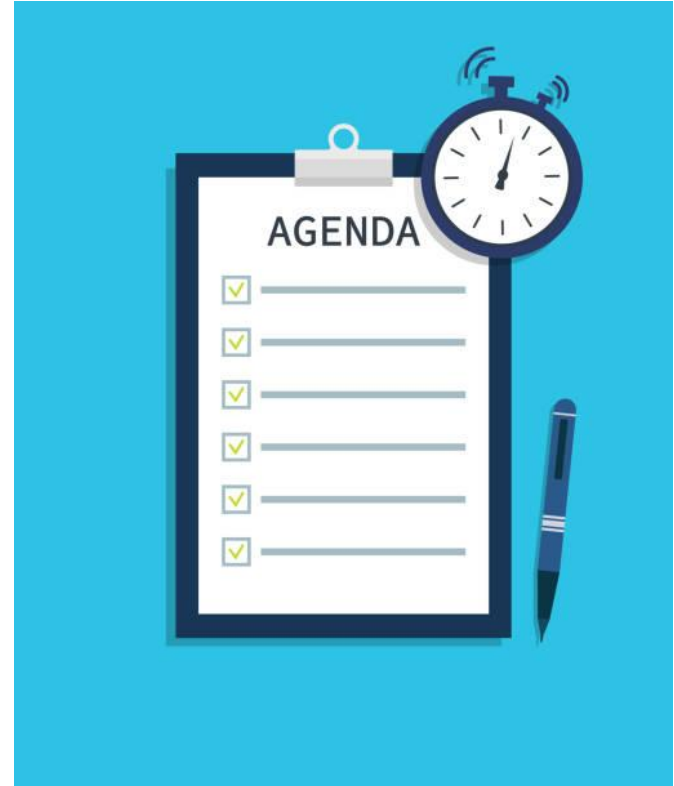
A Study In Equity: Oregon's Ninth Grade Transition

Dan Farley, PhD, Oregon Department of Education &
Keith Zvoch PhD, University of Oregon
Oregon State Board of Education
January 16, 2025

133

Presentation Outline

- Policy Context and Intervention
- A Study in Equity
- Current Results
- Closing





Policy Context & Intervention

Policy Context - High School Success (HSS)

- Oregon has had high dropout rates historically
- In 2013-14, the Oregon Department of Education (ODE) started collecting a ninth grade on track to graduate metric (9G-OTG): completion of 25% of coursework
- Why?
 - Ninth grade is a critical transition point for students: those who stay on track with their coursework are more likely to graduate high school on time
 - On-track metrics serve as an early warning indicator to identify students at risk of not completing high school (Allensworth, 2013; Allensworth & Easton, 2005)

HSS - Allowable Funding Uses

- In November 2016, Oregon voters passed ballot Measure 98, initiating the state's High School Success (HSS) fund
- ODE allocated > \$150 million across approximately 200 districts for high school success efforts
- Districts applied for funding to establish and/or expand programs in three areas:
 - Dropout prevention — ***of most relevance here***
 - Career & technical education
 - College-level education opportunities



HIGH SCHOOL¹³⁷
SUCCESS

Oregon's Student Success Teams

- Across the state, most districts utilized HSS funding to develop and implement 9th grade Student Success Teams for dropout prevention
- Success Teams
 - Hired and trained school-based coaches
 - School-level data system utilization
 - Weekly meetings to review data
 - Student course-taking patterns, absences, grades, and earned credits towards graduation
 - Provided ongoing counseling and support to at-risk students
 - Offered tutoring support
 - Provided mechanisms for credit recovery
 - Directed students to school sanctioned academic and health resources

Implementation (2017-18)

- Ninth grade success teams were classified as full, partial, or not implemented by ODE based on HSS funding plans

- **Full Implementation**

- **Partial Implementation**

- **No Implementation**

	No Implementation	Partial Implementation	Full Implementation	Total
School	33 (11.9%)	98 (35.4%)	146 (52.7)	277
Student	2781 (6.5%)	13855 (32.6%)	25841 (60.8%)	42477



A Study in Equity

A Study in Equity: Oregon's 9th Grade Transition



In 2021, IES funded a collaboration between the Oregon Department of Education (ODE) and the University of Oregon (UO) to evaluate the efficacy of HSS funding on on-track to graduation rates



The primary goal was to determine if the high school success team initiative had a positive impact on Oregon's 9G-OTG trajectory, and whether outcomes varied by the strength of implementation



With the State Longitudinal Data System (SLDS) longitudinal tracking of 9G-OTG ¹⁴¹ (2013-14) and with the start of the HSS initiative in 2017-18, we leveraged interrupted time series (ITS) models to investigate short- and longer-term program outcomes

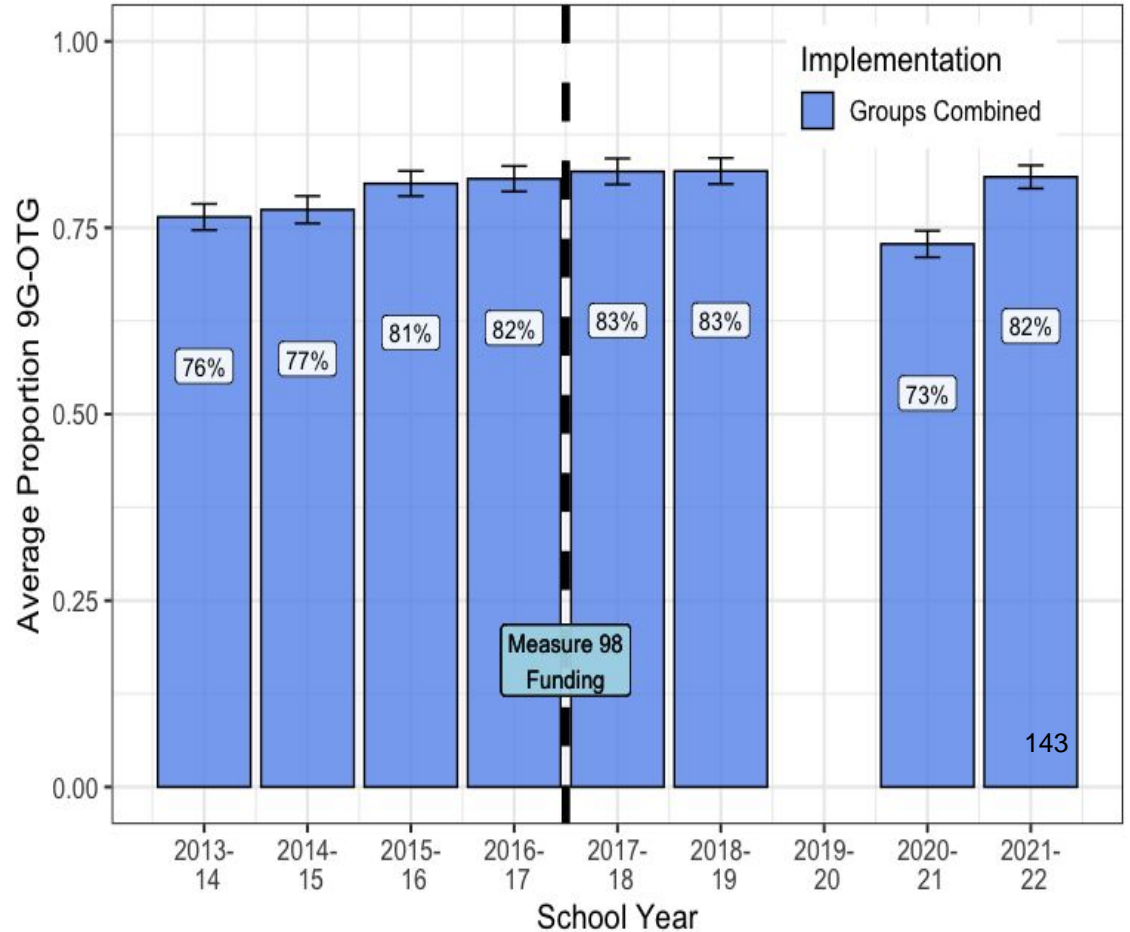
Sample Characteristics

- Students and schools ($N = 277$) from all of Oregon's 197 districts, gathered from Oregon's SLDS
 - Student $N \sim 350,000$
- Analyses were weighted by freshman class size to prevent undue influence from small schools and K-12 schools
- Data from eight 9th grade cohorts (2013-14 to 2018-19, 2020-21, 2021-22)

Grade	2013-1	2014-1	2015-1	2016-1	2017-1	2018-1	2019-2	2020-2	2021-2
	4	5	6	7	8	9	0	1	2
9	X	X	X	X	X	X		X	X

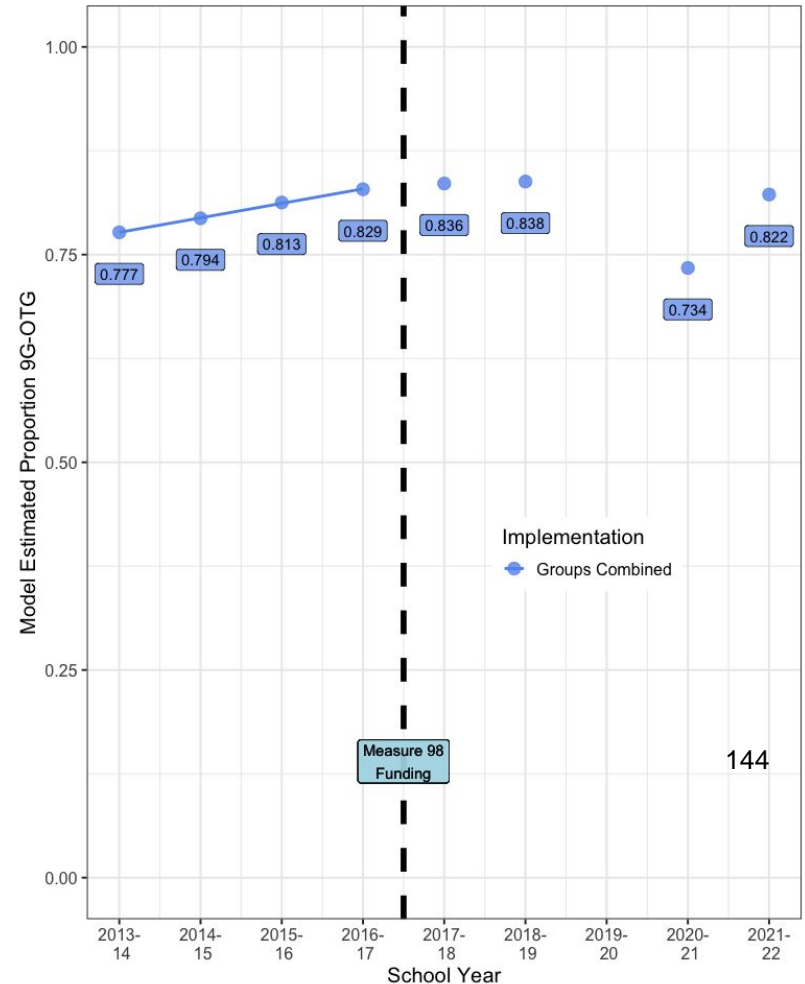
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9G-OTG Rate by Year

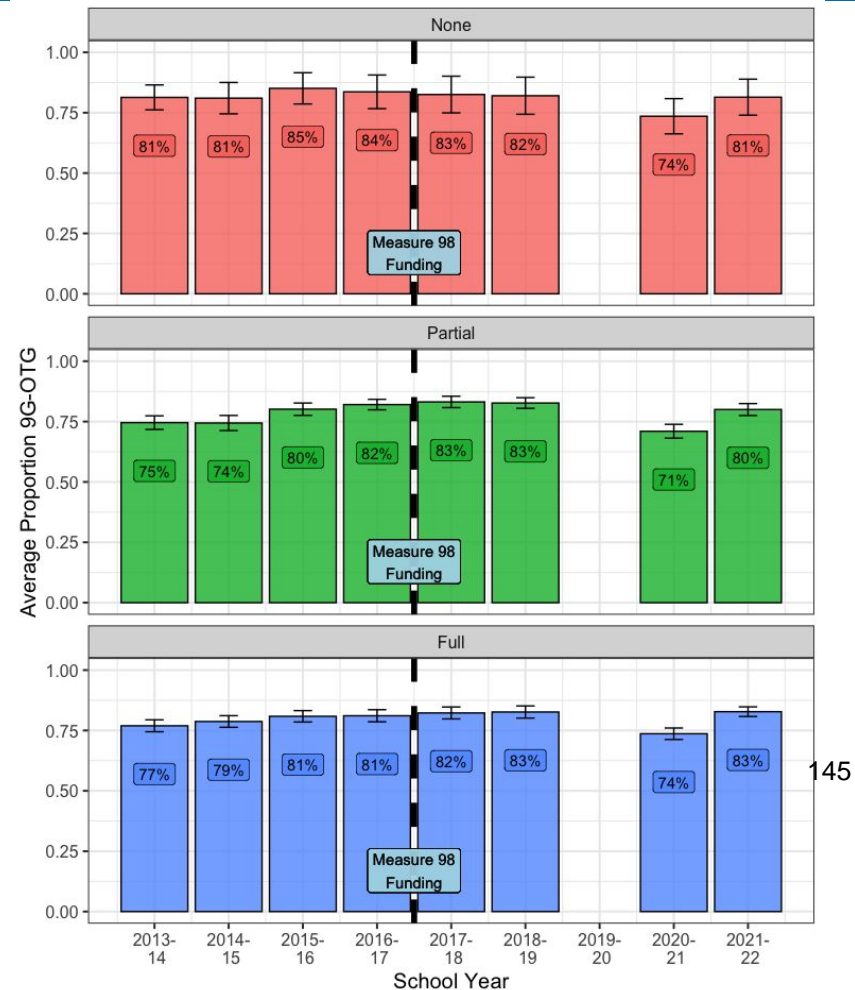


Interrupted Time Series (ITS)

- Looks at data trends before and after a major system event (e.g., a policy change)
- If overall levels and/or the rate of growth changes after the event, causal claims may be supported



9G-OTG Rate by Implementation Status and Year

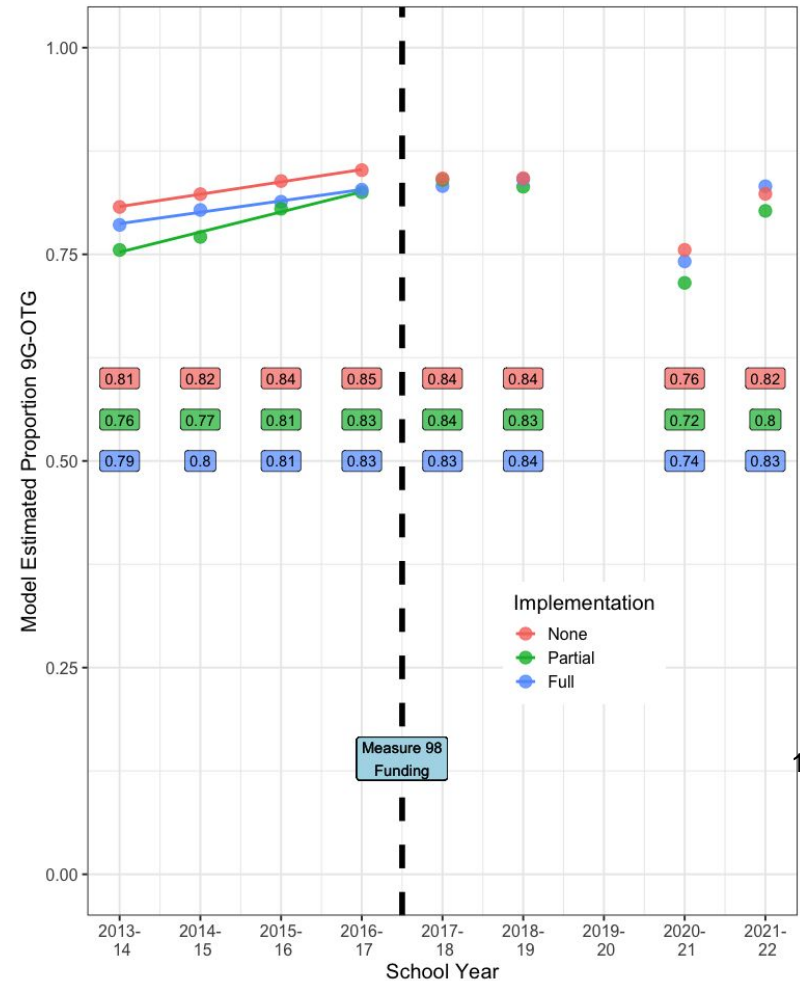


Results: Comparative ITS

Implementation, COVID-19, and 9G-OTG

- ✓ The trend in 9G-OTG rates for no-, partial-, and full-implementation schools differed before passage of Measure 98.
- ✓ After passage of Measure 98, 9G-OTG rates initially held steady in full and partial implementation schools, but slightly dropped in schools that did not implement success teams.
- ✓ During the pandemic, 9G-OTG rates declined for each school type before rebounding in 2021-22.
- ✓ **None of the differences between school types post Measure 98 were statistically significant.**

Oregon Department of Education



Initial Conclusions

- Large statistically significant decreases in 9G-OTG in the post-COVID year for all school types with a rebound the following year
- Some evidence of a closing of the 9G-OTG gap pre-COVID
- Statistical relationships between 9G-OTG rates and school demographics; charter and alternative schools also had relatively lower 9G-OTG rates
- Still a work in progress
- More data forthcoming (22-23)

Other Work: Validation and Exploration

- Machine learning (ML) models exploring the classification of on-track status
- Logistic and ML models predicting on-time graduation
- LLM models to validate implementation coding



Closing

Acknowledgment

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Questions

Oregon State Board of Education

January 16, 2025

AGENDA ITEM: 7.A.

<p>SUBJECT: IES-funded Study in Equity: Oregon’s 9th Grade Transition STAFF NAME & OFFICE: Dan Farley, Office of Research, Assessment, Data, Accountability, and Reporting</p> <p>This presentation reviews an Institute for Education Sciences funded study (R305S210005) where ODE and researchers at the University of Oregon have been evaluating the impact of full, partial, or no implementation of High School Success programs (with a specific focus on the presence of 9th Grade On Track Coaches). The team has evaluated data from 2013-14 through 2021-22 and will present the findings of the study from those data. The team is also evaluating data from 2022-23 and may be positioned to present initial findings from that year, as well.</p>	<p><input checked="" type="checkbox"/> Informational Presentation</p> <p><input type="checkbox"/> Written Report</p>
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BACKGROUND

1. History:

- a. What prompted this update to the board?

The initial study results and trends are available.

2. Purpose

- a. What function does this policy or update hold?

This informational presentation will demonstrate the efficacy of one component of ODE’s High School Success program (HSS).

3. Does the board have any areas of discretion on this policy and/or update?

The board does not have specific discretion in this area, but would certainly be interested in looking at programs that are working and developing a better understanding of how those programs are meeting the needs of Oregon’s students.

4. Stakeholder voice/input (individual and collective i.e., groups)

ODE staff from our High School Success Team, as well as researchers from the Office of Research, Assessment, Data, Accountability, and Reporting helped researchers at the University of Oregon coordinate review of all HSS Program implementation documentation and gain access to the data needed to conduct the interrupted time series analyses. In addition, the ODE/UO team was able to connect with Oregon educators who work in high schools to review all data visualizations and study deliverables, making improvements that make the content more accurate and/or accessible. There are no action steps requested of the board.

SUMMARY OF PREVIOUS BOARD ACTION

Oregon State Board of Education

January 16, 2025

AGENDA ITEM: 7.A.

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

No. This is the first opportunity that the board will have to view these results.

POLICY ISSUE OR CONCERNS

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

1. Stakeholders

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

ODE staff and educators who are in schools doing this work have been consulted as part of the IES-approved study design.

- b. Who are the historically underserved groups affected?

The study findings could impact all of Oregon's high school students, potentially, depending upon the impact the findings have on how the Legislature supports such programs and how districts implement them.

- c. If the rule change or policy decision has tribal implications and it has been deemed appropriate by the Department's Tribal Liaison, the Deputy Superintendent, or State Board, has there been engagement or collaboration with tribes in this rule change or policy decision?

This is not a rule change, so this engagement is not necessary.

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

This is not a rule change, so a response here is not feasible.

2. Negative/Positive Effects

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

The preliminary findings that include data from 2022-23 show that high schools that fully implemented HSS programs experienced the greatest gains in 9th Grade On Track rates from pre-Measure 98 to 2023.

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

Oregon State Board of Education

January 16, 2025

AGENDA ITEM: 7.A.

Full implementation of HSS supports increased outcomes for all students, including those who have historically been marginalized in Oregon’s K-12 public education system.

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

This is a program evaluation result that demonstrates a fully implemented program is benefiting students. The challenge is to generate more resources and support to expand such programs.

- 3. What are the barriers to more equitable outcomes, either:

- a. State or federally mandated?

N/A

- b. Political?

N/A

- c. Emotional?

N/A

- d. Financial?

Funding and human resources to implement HSS programs are the primary limitations, at the state level.

- e. Programmatic?

N/A

EQUITY IMPACT ANALYSIS

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

1. Will historically underserved populations be impacted by this docket item?
 - a. If yes, describe how the rule changes, policy, or action could produce other unintended consequences not listed in the docket.
 - b. If no, refer to *Policy Issue or Concerns* and identify the historically underserved populations affected. Conduct a reflection and examination, which will and should answer 1a.
2. Examine the potential impact of the rule changes, policy, or action on historically underserved populations in Oregon. Describe this ongoing and/or foreseeable impact, using as much detail as possible.
3. Explain how the rule change, policy, or action works toward the elimination of either (one or both):
 - a. the achievement gap
 - b. the opportunity gap

This is an informational session and does not result in a rule change.

FISCAL ANALYSIS

Oregon State Board of Education

January 16, 2025

AGENDA ITEM: 7.A.

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 is no proposed rule change. However, expansion of full implementation of HSS programs appears to be a defensible use of public funds, and has a fiscal impact.

ATTACHMENTS

[DYK #1: What is Measure 98?](#)

[DYK #2: Measure 98 Student Success Team Implementation](#)

[DYK #3: The Ninth Grade On-Track to Graduation \(9G-OTG\) Metric in Oregon](#)

[DYK #4: Student Success Teams and 9G-OTG outcomes prior to the COVID-19 Pandemic](#)

[DYK #5: Diving Deeper: What Measure 98 Means for You](#)

[DYK #6: Student Success Teams and 9G-OTG outcomes during the COVID-19 Pandemic](#)

[DYK #7: Did 9G-OTG Outcomes Rebound After The COVID-19 Pandemic?](#)

[DYK #8: Did High School Success Team Implementation Impact 9G-OTG Rates?](#)

Principal Investigator's Meeting – Washington, DC January 2025 ([Poster Presentation](#))