



# 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, March 13, 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: 10:30 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: 10:45 AM*

A. Technical Fix: Modified Diplomas 4  
B. Repeal of Division 49 Rules 13  
C. Sign Language Interpreter Rulemaking: OAR 581-015-2035 16

### 4. First Readings

A. Regional Educator Network Rule Revisions: OAR 581-012-0001 - OAR 581-012-0019 25  
*Time: 10:50 AM*

Dr. Karen Pérez and Mercedes Jones, Educator Advancement Council

B. Funding Administrative Accounting Fixes: OAR 581-014-0004, OAR 581-013-0015, and OAR 581-017-0809 66  
*Time: 11:20 AM*

Cassie Medina and Brittany Deckard, Office of Education Innovation and Improvement

### 5. Adoptions



*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.*

- A. Student Records and Conditions for Disclosure: Temporary Rules 92  
*Time: 11:40 AM*  
Karin Moscon and Thea Conbere, Office of Education Innovation and Improvement
6. **Break for Lunch**  
*Time: 12:00 PM*
7. **First Readings (continued)**
- A. Charter School Renewal Request: The Ivy School 105  
*Time: 1:00 PM*
8. **Adjourn**  
*Time: 1:30 PM*

**From:** [sherry harvey](#)  
**To:** [StateBoard Public Email](#)  
**Subject:** Distractions, Curriculum Bias and Funding  
**Date:** Friday, February 21, 2025 10:55:40 AM

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You don't often get email from sl.harvey@yahoo.com. [Learn why this is important](#)

[\*\*\* 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. \*\*\*]

We love our kids and grandkids and want their educational outcomes in Oregon to improve. Education is probably the most challenging of duties in the current world of distraction and electronic change. Many of us in the Florence area believe you should reduce or eliminate screens in class and do not allow electronic devices such as phones in the classroom even for curriculum.

We also believe strongly that Oregon educational institutions have toxically indoctrinated students with the false premise that the United States is built upon “systemic and structural racism” and advanced discriminatory policies and practices. You seem to further justify them under the banner of “diversity, equity, and inclusion” (“DEI”), smuggling racial stereotypes and explicit race-consciousness into everyday training, programming, and discipline. This is not a good use of your time or our money. Please cancel these programs and move the funding elsewhere.

We believe that local educators and parents know best how to grow our children and that federal funding should go directly to state and local educators without the overhead of a federal department of education.

We believe that Oregon can free itself to do better with proper focus and funding.

Respectfully,

Sherry Harvey  
Florence, Oregon

**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

March 13, 2025

AGENDA ITEM: 3.A.

<p><b>SUBJECT:</b> OAR 581-022-2010 Modified Diploma (technical fix regarding implementation date)</p> <p><b>STAFF NAME &amp; OFFICE:</b> Aujalee Moore, Beth Wigham, Vanessa Martinez - Office of Teaching, Learning, and Assessment.</p> <p>Summarize the issue. Three to five sentences that explains the subject and the need for board attention—what’s the problem/concern/issue? If this is a rule, what is the change that needs to be made?</p> <p><input type="checkbox"/> New Rule <input checked="" type="checkbox"/> Amend Existing Rule <input type="checkbox"/> Repeal Rule</p>	<p><input type="checkbox"/> <b>First Reading</b> <input type="checkbox"/> Presentation <input type="checkbox"/> No Presentation</p> <p><input checked="" type="checkbox"/> <b>Action</b> <input type="checkbox"/> Temp Rule <input type="checkbox"/> Presentation <input checked="" type="checkbox"/> No Presentation</p>
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## BACKGROUND

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[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

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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.

## HAS THE RULE CHANGED SINCE LAST BOARD MEETING?

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# Oregon State Board of Education

March 13, 2025

AGENDA ITEM: 3.A.

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

## **POLICY ISSUE OR CONCERNS**

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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**

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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**

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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**

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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).

# Oregon State Board of Education

## March 13, 2025

AGENDA ITEM: 3.A.

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

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

### ATTACHMENTS

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

# Oregon State Board of Education

March 13, 2025

AGENDA ITEM: 3.B.

<p><b>SUBJECT: Repeal of STANDARDS FOR THE ACCREDITATION OF EMERGENCY MEDICAL TECHNOLOGY EDUCATION AND TRAINING PROGRAMS OAR 581-49-000 through 581-49-0040</b></p> <p><b>STAFF NAME &amp; OFFICE:</b> Jennell Ives, EII</p> <p>The State Board of Education no longer oversees the Community College and Workforce Development Office and has no authority over its rules.</p> <p><input type="checkbox"/> New Rule <input type="checkbox"/> Amend Existing Rule <input checked="" type="checkbox"/> Repeal Rule</p>	<p><input type="checkbox"/> First Reading <input type="checkbox"/> Presentation <input type="checkbox"/> No Presentation <input checked="" type="checkbox"/> Action <input type="checkbox"/> Temp Rule <input type="checkbox"/> Presentation <input checked="" type="checkbox"/> No Presentation</p>
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## BACKGROUND

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

1. History:

The State Board of Education was the authority over both the Oregon Department of Education and the Office of Community College and Workforce Development (CCWD). In 2011/2012, the Office of Community College and Workforce Development was moved under the Higher Education Coordinating Commission (HECC). Along with this move the statutory authority governing rules around community college including Emergency Medical technician certification moved to the HECC.

2. Purpose

There are still rules regulating Emergency Medical Technician (EMT) under the State Board of Education even though the State Board no longer has statutory authority over these rules. This repeal will help clean up these rules and is prompted by a request from HECC as they are revising their own rules on EMT as OHA intends to make statutory changes.

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

The Board does not have discretion over these rules as they do not have authority over this body of work.

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

CCWD / HECC is seeking the repeal of these rules. There are no unforeseen impacts from the repeal of these rules.

## SUMMARY OF PREVIOUS BOARD ACTION

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

No.

## HAS THE RULE CHANGED SINCE LAST BOARD MEETING?

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

No; same as last month

# Oregon State Board of Education

March 13, 2025

AGENDA ITEM: 3.B.

Yes – As follows:

## POLICY ISSUE OR CONCERNS

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

There are no policy issues or concerns related to the repeal of these rules.

## EQUITY IMPACT ANALYSIS

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

1. Will historically underserved populations be impacted by this docket item?

No

1. 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.

There should be no impact on historically underserved populations.

## FISCAL ANALYSIS

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

There is no impact of the rule on the agency or school districts. The HECC will benefit from not having community members seeing outdated rules on the State Board of Education site.

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

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

Outdated rules will remain and could confuse community members if the board does not repeal these rules.

## STAFF RECOMMENDATION

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**Repeal OAR 581-49-000 through 581-49-0040**

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

# Oregon State Board of Education

**March 13, 2025**

AGENDA ITEM: 3.B.

## **ATTACHMENTS**

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Attachment 1:

[581-015-2035](#)

**Minimum Standards for Sign Language Interpreters Serving Students in Public Schools**

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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

**Statutory/Other Authority:** ORS 185.225 & ORS 343.041

**Statutes/Other Implemented:** ORS 185.110 & ORS 185.225

**History:**

[ODE 33-2024, amend filed 06/14/2024, effective 06/14/2024](#)

ODE 11-2008, f. & cert. ef. 4-21-08

## Summary

**Meeting Date:** 3/13/2025

**Title:** Sign Language Interpreter Minimum requirements

**Status:** Second Reading/Adoption (no changes)

**Presentation:** No (Written Report Only/Consent)

**Key Staff:** Georgeann Harty

**Topic Summary:** HB 2669 gave Sign Language Interpreter licensing to the Health Licensing Office (HLO). ODE needs to change the OAR 581-015-2035 to match the current status of the HLOs process.

## 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?**

Currently, the Oregon Department of Education (ODE) has a temporary rule in place to allow time for the Health Licensing Office (HLO) to complete the licensing process. As HLO continues to develop and finalize this process, it has issued a waiver for licensure. Until HLO establishes a permanent licensing procedure, ODE will continue to operate under the current version of the Oregon Administrative Rule (OAR) to ensure continuity and compliance.

- 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?**

The Board’s authority to act on this item is granted by the following:

SB 2669 – This legislation provides the legal framework for the Board’s decision-making process on this matter.

# Oregon State Board of Education Docket



OAR 581-015-2035 – This administrative rule outlines specific requirements and guidelines related to this policy area.

These regulations are prescriptive in establishing the fundamental requirements and expectations. However, they provide flexibility in determining the implementation timeline and procedural details to ensure compliance and effectiveness.

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

Yes, this item has come before the Board previously. HB 2696 was passed in 2023, and in response, ODE updated its rule to ensure compliance with the legislation.

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

This item is coming before the Board now because the HLO has required additional time to establish the licensure process.

**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.*

## Oregon State Board of Education Docket



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 ODE is committed to reducing barriers to education and ensuring equitable access for all students. Without these changes, students who are deaf and rely on sign language interpreters would face a shortage of qualified interpreters, directly impacting their ability to fully participate in their education.

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: Health Licensing Office

**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.**

HB 2696, passed during the 2023 legislative session, directed the Oregon Health Authority (OHA) Health Licensing Office (HLO) to establish a Licensing Board for educational, medical and legal sign language interpreting licenses. Currently, HLO is still in the process of establishing the Licensing Board, and ODE will continue to collaborate as needed to support the implementation of this legislation.

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

- Northeast Oregon

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

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

ODE prioritized engagement across all geographic regions of Oregon because the need for qualified sign language interpreters is not limited to urban areas—students in every part of the state require access to interpreting services. By ensuring representation from diverse geographic perspectives, ODE gained a more comprehensive understanding of the unique challenges faced by districts and families statewide. Rural communities often experience greater difficulty securing licensed interpreters, and ODE wanted to ensure that licensing requirements did not unintentionally create service gaps for students in these 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?

During the engagement process, ODE heard from districts and families about the need for sign language interpreters to support students. Initially, the expectation was that interpreters would obtain licensure through HLO. However, the licensing process is still underway, and ODE received feedback that this requirement could create unintended service gaps for students. In response, ODE is amending the rule to remove the requirement for this license until the HLO process is complete, ensuring student students continue to receive uninterrupted access to interpreting services.

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

In addition to ODE’s ongoing collaboration with the Health Licensing Office, attendance at Sign Language Interpreter Licensing Board and Regional Advisory Council meetings, and regular communication with Teachers of the Deaf and interpreters, ODE will continue to monitor the implementation of the licensing process and provide input as needed.

## 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.*

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**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.**

No

**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 may have a fiscal impact on the public, as sign language interpreters will need to pay for licensure. This could result in additional costs for individuals seeking to obtain or maintain their credentials. However, the rule amendment removing the immediate licensure requirement ensures that no new costs are imposed on interpreters or districts until the Health Licensing Office finalizes the licensing process. There are no anticipated direct fiscal or administrative impacts on state agencies or local governments at this time. Additionally, while small businesses that employ sign language interpreters may experience some costs associated with compliance once licensure is required, the extent of this impact will depend on the final licensing structure established by the Health Licensing Office.

### **EQUITY IMPACT ANALYSIS**

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*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 on this item will help ensure that students who are deaf or hard of hearing, many of whom belong to other systemically marginalized groups, have continued access to sign language interpreting services essential for their education. Reliable access to interpreters removes barriers to learning, supports meaningful communication, and promotes equitable opportunities. By maintaining flexibility in the licensing requirement until the process is finalized, this action helps prevent service disruptions that could disproportionately impact students who already face systemic barriers.

**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?**

Board action on this item will help increase the number of sign language interpreters in schools, ensuring that students who are deaf or hard of hearing receive the support they need. This will also benefit school district employees and volunteers, particularly those who have been systemically marginalized, by creating a more inclusive learning environment where communication barriers are reduced. Additionally, maintaining flexibility in the licensing requirement helps prevent workforce shortages, allowing districts to retain and recruit qualified interpreters without immediate regulatory hurdles.

**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?**

In the short term, Board action will ensure that sign language interpreters can continue working in schools without interruption while the licensure process is finalized, preventing potential service gaps for students who rely on interpreting services. This stability will help maintain equitable access to education for students who are deaf or hard of hearing and provide continuity for families, educators, and districts.

In the long term, as the licensing process is fully implemented, the action taken now will help support a more structured and sustainable system for sign language interpreting in schools. This will contribute to a stronger, more qualified interpreter workforce, ultimately benefiting students, families, and educators by ensuring consistent, high-quality communication access.

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

If no action is taken, the immediate consequence would be a shortage of sign language interpreters in schools, leading to reduced access to education for students who are deaf or hard of hearing. Continued inaction could create a lasting gap in interpreter availability, further marginalizing students who rely on these services. Districts may face difficulties in meeting their legal obligations to provide accessible education, potentially leading to increased disparities and compliance concerns.

## **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.*

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- 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?**

We propose to update the Oregon Administrative Rule (OAR) by removing the requirement for sign language interpreters to "hold an educational interpreter license" until the licensure process is fully established. We ask the board to approve this change to prevent potential service gaps and ensure continued access to education for students who are deaf or hard of hearing.

- 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](#)?**

This language is responsive to the identified need for continued access to sign language interpreters in schools, as expressed by districts, families, and other stakeholders during the engagement process. By removing the immediate requirement for interpreters to hold a license, it ensures that students who are deaf or hard of hearing do not experience disruptions in services while the licensing process is finalized. This approach aligns with the Board's mission of providing equitable educational opportunities for all students, particularly those from systemically marginalized communities.

- 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.**

We recommend the adoption of the revised rule, which removes the immediate requirement for sign language interpreters to "hold an educational interpreter license" until the licensure process is fully established. This action reflects the Department's commitment to academic excellence by ensuring that students who are deaf or hard of hearing have uninterrupted access to the interpreting services necessary for their educational success. Additionally, the adoption of this revised rule embodies a reimagined approach to accountability, as it addresses the immediate needs of students and families while working toward a more sustainable and structured licensing process in the long term.

- 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

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- 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.

## 581-012-0001

### Definitions: Regional Educator Networks

The following definitions apply to OAR 581-012-0001 to 581-012-0019

- (1) “Educator Advancement Fund” means the fund established by ORS 342.953.
- (2) “ESD” means education service district as defined in ORS 334.003.
- (3) “Nonprofit organization” means an education-focused organization that:
  - (a) Is established as a nonprofit organization under the laws of Oregon; and
  - (b) Qualifies as an exempt organization under section 501(c)(3) or a social welfare organization under 501(c)(4) of the Internal Revenue Code as defined in ORS 314.011.
- (4) “Oregon equity lens” means the equity lens as defined in OAR 581-018-0010.
- (5) “Postsecondary institution of education” means:
  - (a) A community college operated under ORS Chapter 341;
  - (b) The following public universities:
    - (A) University of Oregon;
    - (B) Oregon State University;
    - (C) Portland State University;
    - (D) Oregon Institute of Technology;
    - (E) Western Oregon University;
    - (F) Southern Oregon University;
    - (G) Eastern Oregon University;
  - (c) Oregon Health and Science University; or
  - (d) An Oregon-based, accredited, not-for-profit institution of higher education.
- (6) “School district” means a common or union high school district.
- (7) “Tribe” means any of the federally recognized Native American tribes of this state.
- (8) “Regional Educator Network” means a formal partnership between member organizations, early learning organizations and institutions of higher education that collaboratively work to improve outcomes for all Oregon students by tailoring systems that support a diverse educator workforce and professional learning at each stage of an educator’s career.

(9) “Sponsoring Organization” means a school district, Education Service District, nonprofit organization, postsecondary institution, Tribe, or a consortia or combination of any of these groups in a designated region of the state that convenes a Coordinating Body and meets the requirements of ORS 342.943(2).

(10) “Consortium” means a formal partnership of two or more eligible sponsoring organizations within a region that share the responsibilities of convening a coordinating body and meets the requirements of ORS 342.943(2).

(11) “Member Organization” means eligible organizations that employ Educators served by a Regional Educator Network within the geographic boundary lines that include school districts, state sponsored public charter schools, the Oregon School for the Deaf, Tribes of this state, Education Service Districts and education programs under the Youth Corrections Education Program or the Juvenile Detention Education Program as identified in OAR 581-012-0010.

(12) “Professional learning plans” means a two-year plan developed by Design teams, that is inclusive of teachers and administrators, that identifies purposeful and planned programmatic activities aimed at improvement and innovation to support Educators to improve student outcomes.

(13) “REN plan” means a four-year plan that is developed by the Sponsoring Organization in partnership with member organizations and coordinating body members, that articulates the region’s approach to developing and investing in systems of support for educators and meets the requirements outlined in OAR-581-012-0011.

(14) “Fiscal agent” means OAR 581—12-0009, a school districts, education service districts, or post-secondary institutions of education who partners with a Sponsoring Organization to have the authority to accept, hold and disburse the grant funds, and are responsible for adhering to the terms of the grant agreement, ensuring grant funds are spent properly and all required expenditure reporting is completed.

(15) “Technical assistance” means facilitated training, tools, and processes provided by the Sponsoring Organization to design teams and member organizations to carry out professional learning plan activities

(16) “Formula Funds” mean funds that are dispersed from the Educator Advancement Fund to Sponsoring Organizations to be accessed by eligible member organizations within the region to engage Design teams in the phases of continuous improvement to identify problems of practice and solutions. Eligible member organizations access funds for allowable expenses for the identified problems of practice or member organizations may pool funds and work together on shared problems of practice.

(17) “Capacity Funds” means funds that are dispersed from the Educator Advancement Fund to Sponsoring Organizations for the use of identified uses in OAR 581-012-0013.

(18) “Educator” means a person who is: (a) A teacher, an administrator or another school employee who is employed to provide instruction or support to students in early childhood education or in kindergarten through grade 12; or (b) Entering into or enrolled in an educator preparation program as defined by ORS 342.940

(19) “Coordinating Body” means required by ORS 342.943 and shall include a majority of Educators, as defined by ORS 342.940, who are based in schools from different grades and content areas and reflective of the student demographics of the region served by the Educator Network. The Coordinating Body shall also include members representing relevant state agencies, early learning providers and professionals, school board members, educator preparation providers, education-focused nonprofit organizations, professional education associations, and federally recognized Tribes of this state.

(20) “Design Teams” means improvement teams that include, but are not limited to, school building, school district, and/or education service district members inclusive of administrators, licensed teachers, classified staff, human resources professionals, and other school personnel who work together to identify priority problems of practice and design or identify professional learning to improve educator systems of support while using a continuous improvement process.

(21) “Continuous improvement” means an ongoing process that implements the principles of improvement science and analyzes the whole system, what works for whom and under what conditions. The process takes an iterative approach that is rooted in data collection, reflection, and actions for improvement.

(22) “High quality professional learning” means ongoing and responsive learning opportunities that are standards-aligned, interactive, and customized to educators’ needs to build the knowledge, skills, and dispositions required to eliminate disparities, disproportionality and predictability in student outcomes and provides opportunities to apply learning across contexts.

(23) “Regional Educator Network Participant” means an Educator, as defined by ORS 342.940, who participates in any activity identified in an Educator Advancement Council-approved Professional Learning Plan that is funded by a Regional Educator Network.

**Statutory/Other Authority:** ORS 342.940 & ORS 324.943

**Statutes/Other Implemented:** ORS 342.940 & ORS 324.943

**History:**

[ODE 147-2019, adopt filed 10/24/2019, effective 10/24/2019](#)

[ODE 19-2019, temporary adopt filed 05/20/2019, effective 05/20/2019 through 11/15/2019](#)

### **581-012-0003**

#### **Equity Lens: Regional Educator Networks**

The Educator Advancement Council, the Oregon Department of Education, and the Regional Educator Networks will apply the Oregon equity lens in all work relating to the Educator Advancement Fund and the Regional Educator Networks.

**Statutory/Other Authority:** ORS 342.940 & ORS 324.943

**Statutes/Other Implemented:** ORS 342.940 & ORS 324.943

**History:**

[ODE 147-2019, adopt filed 10/24/2019, effective 10/24/2019](#)

[ODE 19-2019, temporary adopt filed 05/20/2019, effective 05/20/2019 through 11/15/2019](#)

### **581-012-0005**

#### **Educator Advancement Fund**

The Educator Advancement Fund may be used for the following purposes:

(1) Regional Educator Network capacity grants pursuant to OAR 581-012-0013;

(2) Regional Educator Network formula funding pursuant to OAR 581-012-0015;

(3) Other investments directed by the Oregon Legislature or the Educator Advancement Council pursuant to OAR 581-012-0017; and

(4) Educator Advancement Council and ODE administrative costs.

**Statutory/Other Authority:** ORS 342.940 & ORS 324.943

**Statutes/Other Implemented:** ORS 342.940 & ORS 324.943

**History:**

[ODE 147-2019, adopt filed 10/24/2019, effective 10/24/2019](#)

[ODE 19-2019, temporary adopt filed 05/20/2019, effective 05/20/2019 through 11/15/2019](#)

### **581-012-0007**

#### **Regional Educator Networks Sponsoring Organization Requirements**

(1) The Educator Advancement Council will ~~develop~~ establish Regional Educator Networks, hosted by a Sponsoring Organization, across the state for the purpose of facilitating the work of ~~school districts~~ eligible member organizations in their respective regions as they work towards improving professional learning systems designed to support educators.

(2) ~~Regional Educator Networks Sponsoring Organizations~~ must:

(a) Comply with all requirements of ORS 342.943;

(b) Establish and convene a coordinating body for the regional educator network with membership based on the requirements in statute ORS 342.943(2)(f) to identify regional needs and priorities;

(c) Convene and support member organizations in their region to develop professional learning plans and educator advancement systems that reflect educator voice and engagement;

(d) Convene and support design teams for the purpose of sharing learning around common themes to scale best practices across the school, districts, and the region to address system conditions that produce inequities;

~~(e)~~ Oversee and monitor Educator Advancement Fund resources allocated to the Regional Educator Network;

~~(e)~~ Reflect and communicate the nature and intent of the Educator Advancement Fund funding;

~~(f)~~ Model and reinforce authentic local partner-stakeholder and educator engagement efforts;

~~(g)~~ Demonstrate a commitment to equity-driven policies and practices including engagement of community stakeholder-interest groups;

~~(h)~~ Support the member organizations to implement the principals of improvement science as defined by the Regional Educator Network Request for Application through phases 1-3 of a continuous improvement process as defined by the Regional Educator Network Request for Applications;

~~(i)~~ Participate in ongoing Training and Technical Assistance as required by the Educator Advancement Council;

~~(j)~~ Ensure the Regional Educator Network coordinator is communicating regularly with the Educator Advancement Council staff;

~~(k)~~ Develop a local plan in accordance with OAR 581-012-0011 to be submitted to the Educator Advancement Council every four years;

~~(m)~~ Host and promote Training and Technical Assistance opportunities offered by the Educator Advancement Council to support the work of governance groups and/or districts;

~~(mn)~~ Participate in best-practice sharing with other Regional Educator Networks, including Educator Advancement Council hosted statewide Regional Educator Network convenings; ~~and~~

~~(no)~~ Collaborate with other Regional Educator Networks to meet the identified needs of an eligible member organization-district if a priority is not being addressed in their local Regional Educator Network; and

~~(p)~~ Facilitate and coordinate across the network to advance the network's shared goals and priorities.

~~(q)~~ Establish regular communication loops with all eligible member organizations about opportunities to engage in the Regional Educator Network;

~~(r)~~ Monitor and report on progress towards statewide outcomes identified by the Educator Advancement Council that include:

~~(s)~~ Ensure professional learning models statewide engage teachers, administrators, and other Educators to design and implement equity-driven, high-quality professional learning aligned to state-adopted professional learning standards to improve student outcomes;

~~(t)~~ Ensure the voices of classroom teachers and other Educators are regularly included in decision making regarding professional learning priorities, Educator supports, and policies impacting Educators at local schools, districts, and regions;

~~(u)~~ Improve and expand models to provide all novice Educators access to high-quality mentoring and professional development support during their first three years to promote effective practices and increase Educator retention; and

~~(v)~~ Innovate to expand models statewide to support career pathways into and through Educator careers and provide financial resources and other support to achieve an Educator workforce that is equity-driven and more reflective of pre-K–12 student demographics.

(3) The Educator Advancement Council may revoke a ~~Regional Educator Networks~~Sponsoring Organization status for failure comply with the requirements of this rule or ~~failure~~failure to meet all requirements as specified in the Regional Educator Network Request for Applications issued by the Oregon Department of Education on behalf of the Educator Advancement Council. The Educator Advancement Council still will use statewide identified metrics to monitor Sponsoring Organization compliance of this rule and the requirements specified in the Regional Educator Network Request For Application.

(a) The Educator Advancement Council will provide written notice to a ~~Regional Educator Network~~Sponsoring Organization of any failure to comply with this rule or the Request for Application.

(b) Within 30 days of receiving written notice under subsection (3)(a) of this rule, the ~~Sponsoring Organization Regional Educator Network~~ must submit proposed corrective action to the Educator Advancement Council.

(c) The Educator Advancement Council will approve the proposed corrective action submitted under subsection (3)(b) of this rule if the proposed corrective action has a substantial likelihood of bringing the

~~Regional Educator Network Sponsoring Organization~~ back into compliance with this rule and the Request for Application.

(d) Within 60 days of approval of the proposed corrective action plan under subsection (3)(c) of this rule, the ~~Regional Educator Network Sponsoring Organization~~ must complete the corrective action. If the ~~Regional Educator Network Sponsoring Organization~~ does not complete the corrective action within the required time, the Educator Advancement Council will revoke the ~~Regional Educator Network's Sponsoring Organization's~~ status and immediately cease all funding to the ~~Regional Educator Network Sponsoring Organization~~. If extenuating circumstances exist, the ~~Regional Educator Network Sponsoring Organization~~ may request an extension of time to comply.

(e) Unless otherwise prohibited by statute, the Council may delegate these determinations to its Executive Director.

**Statutory/Other Authority:** ORS 342.940 & ORS 324.943

**Statutes/Other Implemented:** ORS 342.940 & ORS 324.943

**History:**

[ODE 147-2019, adopt filed 10/24/2019, effective 10/24/2019](#)

[ODE 19-2019, temporary adopt filed 05/20/2019, effective 05/20/2019 through 11/15/2019](#)

### **581-012-0009**

#### **Criteria for Selecting Regional Educator Networks Sponsoring Organizations**

~~(1)~~ ~~(1) The~~ For each biennium, the Educator Advancement Council may establish a request for application solicitation and approval process under the following circumstances:

~~(a)~~ The current Sponsoring Organization has notified the Educator Advancement Council, in writing, they can no longer sponsor a Regional Educator Network; or

~~(b)~~ The status of a Sponsoring Organization has been revoked by the Educator Advancement Council for failure to comply with ORS 581-012-0007 (3) and the Request for Application.

~~(2)~~ The ~~Council~~ Educator Advancement Council staff will notify eligible ~~applicants~~ Sponsoring Organizations of the application process and the due dates, and make available necessary guidelines and application forms.

~~(23)~~ All applications must comply with the requirements of ORS 342.943 and rules adopted to implement those laws.

~~(34)~~ The Educator Advancement Council will select ~~Regional Educator Networks Sponsoring Organizations~~ based on the evaluation of the grant applications and the geographic location of applicants to ensure all areas of the state are represented in a Regional Educator Network.

~~(45)~~ The following entities are eligible to be a ~~Regional Educator Network Sponsoring Organization~~:

(a) School districts;

(b) ESDs;

(c) Non-profit organizations;

(d) Post-secondary institutions of education;

(e) Tribes; and

(f) A consortium of any combination thereof of entities described in this subsection.

~~(56) Regional Educator Networks Sponsoring Organizations~~ must be or partner with an eligible fiscal agent. Eligible fiscal agents are school districts, ESDs, or post-secondary institutions of education.

**Statutory/Other Authority:** ORS 342.940 & ORS 342.943

**Statutes/Other Implemented:** ORS 342.940 & ORS 342.943

**History:**

[ODE 29-2024, temporary amend filed 05/23/2024, effective 05/23/2024 through 11/18/2024](#)

[ODE 147-2019, adopt filed 10/24/2019, effective 10/24/2019](#)

[ODE 19-2019, temporary adopt filed 05/20/2019, effective 05/20/2019 through 11/15/2019](#)

### **581-012-0010**

#### **Member Organizations**

(1) The following entities may ~~join~~ engage and receive support and or funding from a Regional Network as an eligible member organization:

(a) School districts;

(b) State-sponsored public charter schools (per ORS 338.075);

(c) The Oregon School for the Deaf; ~~and~~

(d) An education program under the Youth Corrections Education Program or the Juvenile Detention Education Program;

~~(e) Federally Recognized Tribes of this State; and~~

~~(f) Education Service Districts;~~

(2) Each ~~biennium, Regional Educator Network Sponsoring Organizations~~ shall notify ~~and~~ invite eligible member organizations located within the regional geographic boundary to ~~participate~~ serve on the Coordinating Body, apply for funding, receive technical assistance and or participate in network convenings in the ~~through the~~ Regional Educator Network. ~~The notification required by this subsection shall be provided in writing and directed to the chief executive officer or superintendent of the eligible member organization. Member Organizations shall respond, in writing, on how the Member Organization would like to engage in the Regional Educator Network, within 30 days of the date the Regional Educator Network executes their grant agreement with the Department of Education.~~

~~(3) Member Organizations may engage with a Regional Educator Network in the following ways:~~

~~(a) have a representative serve on the Coordinating Body;~~

~~(b) apply for funding through the Regional Educator Network by creating a Design Team and developing a professional learning plan that is submitted to the Regional Educator Network;~~

~~(c) receive technical assistance from the Regional Educator Network to develop or implement a professional learning plan;~~

(d) participate in a Design Team; and

(e) participate in network convenings to learn and collaborate with other Educators and to identify local and regional problems of practice, priorities, and solutions that improve systems of support for all Educators.

~~(3) An eligible member organization may choose to opt out of the Regional Educator Network by informing the Regional Educator Network in writing no later than 30 days after receiving notice of assignment under subsection (2) of this rule. Within 14 days of receiving such written notice, a Regional Educator Network Coordinator shall forward said notice to the Educator Advancement Council. If an eligible member organization fails to provide written notice within 30 days after receiving notice of assignment, the eligible member organization will become part of the Regional Educator Network. The Educator Advancement Council will direct the Oregon Department of Education to hold resources allocated on behalf of the opting out member organization in the Educator Advancement Fund. The Educator Advancement Council may then allocate those funds for any of the purposes identified in OAR 581-012-0005.~~

~~(4) An Beginning on July 1, 2020, an eligible member organization currently participating in a Regional Educator Network may request reassignment to a different Regional Educator Network if their needs are not being met. This request must be made at least 90 days before the start of a new biennium.~~

~~(a) The request for reassignment must be made to the Educator Advancement Council. The request must state the reason for seeking reassignment. Educator Advancement Council staff will conduct an **an** analysis based on Educator Advancement Council established criteria and make a recommendation to the Educator Advancement Council.~~

~~(b) The Educator Advancement Council will assess the request for reassignment based on the following criteria:~~

~~(A) Whether a compelling rationale exists relative to alignment of system improvement efforts;~~

~~(B) Evidence of Member Organization efforts to engage in network as described in subsection (3) of this rule;~~

~~(C) Evidence of current assigned Regional Educator Network efforts to collaborate with other Regional Educator Networks to meet the needs of the Member organization; and -and~~

~~(DB) Whether there are documented requests to transfers from the member organizations constituency, inclusive of teacher and administrator voices that identify collective needs not being met.~~

~~(C) Educator Advancement Council staff will verify the requested receiving Regional Educator Network is willing to accept the transferring eligible member organization.~~

~~(D) Upon approval by the Educator Advancement Council, the eligible member organization will be assigned to the new Regional Educator Network. The Educator Advancement Council shall update the regional boundary lines to reflect the reassignment of the member organization. At the start of the new biennium The new Regional Educator Network shall receive 50% of the remaining funding associated with the transferring member organization for the current biennium. The remaining 50% of funding for the current biennium shall remain with the original Regional Educator Network.the Educator Advancement Council, shall recalculate the award amounts for the impacted Regional Educator Networks.~~

**Statutory/Other Authority:** ORS 342.940 & ORS 342.943

**Statutes/Other Implemented:** ORS 342.940 & ORS 342.943

**History:**

[ODE 157-2019, adopt filed 12/17/2019, effective 12/17/2019](#)

[ODE 150-2019, temporary adopt filed 10/30/2019, effective 10/30/2019 through 04/26/2020](#)

### **581-012-0011**

#### **Regional Educator Network Regional Plan**

(1) ~~Regional Educator Networks~~Sponsoring Organizations must develop a regional plan that articulates the region's approach to developing and investing in systems of support for Educators. The regional plan must:

(a) Comply with the requirements of ORS 342.943(3) and (4);

(b) Incorporate ~~the local professional learning plans~~ that include activities that align to the EAC identified statewide outcomes and are developed by ~~each~~Educators of the Regional Educator Network's member organizations;

(c) Describe ~~any~~ technical assistance to be provided by the ~~Regional Educator Network~~ Sponsoring Organization to Member Organization that will assist in the implementation of activities identified in professional learning plans;

(d) Identify responsibilities of the required Regional Educator Network coordinator and the amount of assigned FTE;

(e) Identify leveraged resources and additional partner contributions;

(f) Articulate how funding will be used to support the work of the Regional Educator Network and ~~local districts~~member organizations; ~~and~~

(g) Describe how the Sponsoring Organization will engage network members and partners to build and strengthen the network; and

(hg) Span a minimum of four years

(2) ~~Regional Educator Networks~~Sponsoring Organizations must submit the regional plan to the Educator Advancement Council. Each biennium the Educator Advancement Council staff will announce a deadline for submission of the regional plan.

(3) The Educator Advancement Council must review regional plans submitted by each ~~Regional Educator Network~~Sponsoring Organization to determine whether the plan should be approved. A regional plan will be approved if the plan meets the requirements of subsection (1) of this rule.

(4) ~~Regional Educator Networks~~Sponsoring Organizations may amend an approved plan so long as the amendment is done in consultation with the Educator Advancement Council and the amended plan is approved by the Council as required under subsection ~~(1)~~(15) of this rule.

(5) If a REN Plan is not approved by the Council, the EAC staff will notify the Sponsoring Organization in writing that includes a rationale for why the plan was not approved.

(a) Within 30 days of receiving written notice, the Sponsoring Organization must submit a revised plan to the Educator Advancement Council for review.

(c) The Educator Advancement Council will approve the proposed revisions submitted if the plan meets the requirements of subsection (1) of this rule.

**Statutory/Other Authority:** ORS 342.940 & ORS 324.943

**Statutes/Other Implemented:** ORS 342.940 & ORS 324.943

**History:**

[ODE 147-2019, adopt filed 10/24/2019, effective 10/24/2019](#)

[ODE 19-2019, temporary adopt filed 05/20/2019, effective 05/20/2019 through 11/15/2019](#)

### **581-012-0013**

#### **Regional Education Network Capacity Grants**

(1) For each biennium, the Educator Advancement Council will review the formula used to determine and communicate the total amount of funds to be made available to the Regional Educator Networks Sponsoring Organization as capacity grants. The Educator Advancement Council may update the formula.

(2) The Oregon Department of Education will distribute funds from the Educator Advancement Fund to each Regional Educator Networks Sponsoring Organization according to the direction of the Educator Advancement Council.

(3) Capacity grants can shall be used for the following purposes:

(a) Staffing, supplies, and travel costs for at least one dedicated Regional Educator Network staff person to work with people and schools member organizations in the region and convene network members;

(b) Costs related to convening the coordinating body or district teams, including costs for travel and actual costs of hiring substitutes for teachers; and

(c) Contracts for services provided by an outside entity to the Sponsoring Organization for facilitation or support of REN implementation. Sponsoring Organizations must receive prior approval from Educator Advancement Council staff to contract with any outside entity. to provide support with data collection, technical assistance, evaluation, and educator development content expertise.

(4) Regional Educator Networks Sponsoring Organizations must separately account for funding received under this section and must submit an expenditure report to the Educator Advancement Council upon request by the Council.

(5) If a Regional Educator Network Sponsoring Organization does not spend all of the allotted funds in the given biennium, the Educator Advancement Council will direct the Department of Education to reallocate the funds to one or more of the other Regional Educator Networks or hold the funds in the Educator Advancement Fund to be distributed in the following biennium.

**Statutory/Other Authority:** ORS 342.940 & ORS 324.943

**Statutes/Other Implemented:** ORS 342.940 & ORS 324.943

**History:**

[ODE 147-2019, adopt filed 10/24/2019, effective 10/24/2019](#)

[ODE 19-2019, temporary adopt filed 05/20/2019, effective 05/20/2019 through 11/15/2019](#)

## **581-012-0015**

### **Regional Educator Network Formula Funding**

(1) For each biennium, the Educator Advancement Council will review the formula used to determine the total amount of funds to be made available to the Regional Educator Networks Sponsoring Organizations. The Educator Advancement Council may update the formula. -Formula funding is for use by ~~the~~ eligible member organizations within the Regional Educator Network based on data provided by the Oregon Department of Education.

(2) The Oregon Department of Education will distribute funds from the Educator Advancement Fund to each Regional Educator Network Sponsoring Organization according to the direction of the Educator Advancement Council.

(3) ~~The Regional Educator Sponsoring Organizations Networks~~ must expend funds received under this section in accordance with the Regional Educator Network Request for Applications issued by the Educator Advancement Council and the regional plan developed and approved under 581-012-0011.

(4) The purpose of formula funds are to support eligible member organizations with costs associated with the delivery and implementation of educator support strategies, services, and resources identified in the Educator Advancement Council- approved regional plan that address problems or practice and solutions. Formula funds can be used for the following:

(a) School or district sub-grants to eligible member organizations for implementation of school or district improvement strategies identified in the Regional Educator Network Plan. Allowable costs include:

(A) Staffing or contracted services for the delivery of school or district improvement strategies aligned to the regional plan;

(B) Program materials, supplies, and instructional resources;

(C) Stipends, reimbursements, or other wages for educator release time;

(D) Purchase of software or hardware directly related to the implementation of the strategy;

(E) Training or conference fees; and

(F) Substitute reimbursement to school district.

(b) Regional strategy facilitation costs of implementing regional facilitation of improvement strategies identified in the regional plan. Allowable costs include:

(A) Staffing or contracted services delivered by the Sponsoring Organization to districts and or schools to build local capacity. Services may include technical assistance, coaching, or training that supports the implementation of the regional plan strategies;

(B) Program materials, supplies, and instructional resources; and

(C) Reimbursements or other payments to individual educators and or districts for educator time spent outside of contract hours participating in Regional Educator Network strategies or activities as a designer, facilitator, or participant.

(c) Design team convening costs including travel reimbursement and substitute reimbursement to school district.

(54) ~~Regional Educator Networks~~Sponsoring Organizations must separately account for funding received under this section and must submit an expenditure report to the Educator Advancement Council upon request by the Council.

(65) If a Regional Educator Network does not spend all of the allotted funds in the given biennium, the Educator Advancement Council will direct the Oregon Department of Education to hold the funds in the Educator Advancement Fund. The Educator Advancement Council may then allocate those funds for any of the purposes identified in OAR 581-012-0005.

**Statutory/Other Authority:** ORS 342.940 & ORS 324.943

**Statutes/Other Implemented:** ORS 342.940 & ORS 324.943

**History:**

[ODE 147-2019, adopt filed 10/24/2019, effective 10/24/2019](#)

[ODE 19-2019, temporary adopt filed 05/20/2019, effective 05/20/2019 through 11/15/2019](#)

#### **581-012-0017**

##### **Other Investments**

(1) The Educator Advancement Council may make other investments at the direction of the legislature or at the discretion of the Educator Advancement Council.

(2) The Oregon Department of Education will distribute funds according to the direction of the Educator Advancement Council.

**Statutory/Other Authority:** ORS 342.940 & ORS 324.943

**Statutes/Other Implemented:** ORS 342.940 & ORS 324.943

**History:**

[ODE 147-2019, adopt filed 10/24/2019, effective 10/24/2019](#)

[ODE 19-2019, temporary adopt filed 05/20/2019, effective 05/20/2019 through 11/15/2019](#)

#### **581-012-0019**

##### **Reporting: Regional Educator Network**

Prior to the end of each fiscal year, a ~~Regional Educator Network~~Sponsoring Organization receiving funds from the Educator Advancement Fund must submit to the Educator Advancement Council:

(1) An expenditure report; and

(2) Audited financial statements.

(3) A report on progress toward goals and locally identified metrics in the regional plan and other metrics identified by the Educator Advancement Council.

**Statutory/Other Authority:** ORS 342.940 & ORS 324.943

**Statutes/Other Implemented:** ORS 342.940 & ORS 324.943

**History:**

[ODE 147-2019, adopt filed 10/24/2019, effective 10/24/2019](#)

[ODE 19-2019, temporary adopt filed 05/20/2019, effective 05/20/2019 through 11/15/2019](#)

## Summary

**Meeting Date:** 3/13/2025

**Title:** Regional Educator Network Rule Revisions

**Status:** First Reading

**Presentation:** Yes

**Key Staff:** Dr. Karen Perez and Mercedes Jones

**Topic Summary:** The OAR's for the Regional Educator Networks (RENs) were adopted in 2019. The ten RENs were launched in late 2019/early 2020. Since 2019, the OAR's have become outdated and/or irrelevant as the program has evolved and grown over time. There is a need to further clarify and define the program to bring coherence and shared understanding of the program requirements.

## 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 does it operate in the school setting? How does it ultimately serve students?**

In 2018, the Oregon Department of Education released a Request for Application (RFA) to identify ten Sponsoring Organizations to sponsor ten Regional Educator Networks (RENs). Ten Education Service Districts (EDSs) were selected and launched the RENs in late 2019 and early 2020. The RENs are responsible for supporting all 197 districts and all educators across the state providing access and resources to high quality educator systems of support to ultimately improve student achievement. Each region is guided by a Coordinating Body, which is made up of classroom teachers, classified staff, administrators, and other education system partners to identify and inform regional needs and priorities. Each REN is working to achieve the statewide REN policy goals:

- Provide open access to **high-quality and culturally responsive professional learning** and support for educators in the state that **reflects teacher voice**, local context, and stages of an educator's career, maximizing collaborative leadership among teachers and administrators and reflects professional learning standards.

- **Enhance a culture of leadership and collaborative responsibility** that elevates and advances the teaching profession among professionals employed by early learning services, schools serving students in kindergarten through grade 12, educator service districts, educator preparation providers, nonprofit organizations, professional associations, and community-based organizations.
- Strengthen and enhance existing **evidence-based practices** that **improve student achievement** and that reflect changing student needs and demographics.
- Improve the **recruitment, preparation, induction, and support** of educators at each stage of the educators' careers.
- Enhance **leadership and career advancement opportunities** for teachers and **increase the perspectives of teachers** in identifying priorities for funding educator professional learning and educator supports.

**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 342.490

(7)(a) The State Board of Education and the Teacher Standards and Practices Commission may adopt any rules necessary at the request of the council to support the council or to perform any duties assigned to the board or commission under this section.

(b) The council may adopt rules pursuant to ORS chapter 183 for the purposes of ORS 329.788 to 329.820 and 342.943.

(8) The council shall be considered a board for purposes of ORS chapter 180. [2017 c.639 §1; 2017 c.639 §§20,25; 2021 c.518 §14; 2023 c.440 §3; 2023 c.592 §38; 2023 c.601 §1]

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

The SBE first adopted the REN rules in 2018. In 2024, the SBE approved a temporary rule change regarding the Request for Application process. The revision removed the requirement for the EAC to “establish an RFA each biennium” and replaced it with the EAC “may establish an RFA each biennium” to allow for flexibility and on an “as needed” basis. This temporary rule change allowed for the EAC to engage with partners and collect feedback on how to improve the RFA process to then develop a more responsive and permanent rule.

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

Since the inception of the RENs, there has been a lot of learning as to the types of processes and structures that are required to effectively support and implement the REN programs. The current rules lack clarity, have become outdated and some rules contradict the goals of the RENs programs. REN grantees have requested clearer guidelines and parameters for the program in areas such as budget, program implementation and roles and responsibilities for

# Oregon State Board of Education Docket



members of the network. RENs will enter into new grant agreements with ODE July 1, 2025, as well as be developing and submitting regional plans to the EAC in 2025, which provides the perfect opportunity and timing to update REN rules to provide clearer guidance.

**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**

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*The State Board of Education expects all items that come before it to 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?**

All 10 grantees who sponsor and implement a REN program are impacted by the REN rules. The lack of clarity within the rules has created challenges with implementation. Starting in January of 2024 the EAC staff have conducted multiple forms of engagement around the REN rules with multiple partners including those responsible for implementation of the program, those who oversee the program implementation, and contract holders. The feedback and input received from partners greatly informed the revisions made to the rules.

Additionally, EAC staff consulted with the nine federally recognized tribes, which also confirmed challenges with the current rules.

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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 (DEL; 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.

Please enter your answer here

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 perspectives?

The REN program is a statewide initiative that serves all 197 school districts across the state. The RENs work towards common statewide measures and goals, but localize how investments are distributed and supports are prioritized by centering educator experiences and collecting

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and assessing local data therefore making it imperative we engage perspectives from each region of the state to better understand how implementation is occurring in different regions.

**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?**

EAC staff conducted multiple feedback sessions that started back in January of 2023 until February of 2025. Key pieces of feedback we received included:

- The need to remove administrative burdens such as the requirement to establish an RFA each biennium, which often impacts small and rural ESDs and disrupts services and supports being provided to rural educators.
- The need to clarify roles and responsibilities of members of the networking including the coordinating body, sponsoring organization, and member organizations.
- The need to clarify allowable expenses.
- The need to further define processes and criteria for REN plans and reporting.

EAC staff relied on statute when differences in opinion were brought forth and used the law as the anchor in which the rules were revised.

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

EAC staff are continuing to conduct additional engagements with partners and will provide opportunities for feedback from REN Coordinators and sponsoring organizations across the state during the month of March, as well as engage EAC directors through monthly workgroups to review revisions and provide feedback. EAC staff will also engage Tribes at the government to government education cluster meeting for additional input and feedback.

### **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.**

No.

- 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?**

No.

## **EQUITY IMPACT ANALYSIS**

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*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?**

A main goal of the RENs is to improve student achievement by providing access to high quality and culturally responsive professional learning for every educator across the state. Because of the lack of clarity within the rules, REN implementation and effectiveness varies across the state, thus making it difficult to understand how REN impact is affecting student outcomes. By adopting the REN rule revisions, the EAC staff will be able to provide REN programs with clear guidelines related to roles and responsibilities of network members, allowable costs, statewide outcomes, program implementation and reporting.

- 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?**

By providing RENs with clearer guidelines related to roles and responsibilities of network members and program implementation they will be able to effectively provide supports and services to educators across the state that meet the needs of systemically marginalized educators, such as rural educators, educators of color, and Indigenous educators across the regions.

- 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?**

None.

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

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The consequences of inaction would impact the RENs in a negative way including, REN programs operating outside of their scope of work and lack of access to high quality systems of supports for educators across the state.

### 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 revisions being proposed encompass OARS 581-012-0001 to 0015. The summary of changes include:

- Revises definitions of terms for clarity
- Adds terms and definitions to build shared understanding
- Adds language to clarify roles and responsibilities of network members
- Removes the requirement to establish an RFA each biennium and instead identifies two specific circumstances that would require an RFA
- Expands the definition of member organizations to include the nine federally recognized tribes of Oregon and education service districts
- Removes the option for a member organization to opt out of a REN
- Adds language to describe how a member organization can engage in a REN
- Adds language to clarify the purpose of the REN plan and criteria used to evaluate the plans
- Adds language to clarify allowable expenses using grant funds

**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 proposed revisions address the feedback received by EAC partner groups by removing specific requirements that impact small and rural sponsoring organizations and districts and but also adding language to clarify specific and critical areas of the REN program.

**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.**

EAC staff is requesting the board consider approving the proposed rule revisions, which would result in further clarify of who is responsible for what and how the program is administered statewide.

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**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.



# Educator Advancement Council (EAC) Regional Educator Network (REN) Rule Updates

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Dr. Karen Pérez, Executive Director, she/her/ella

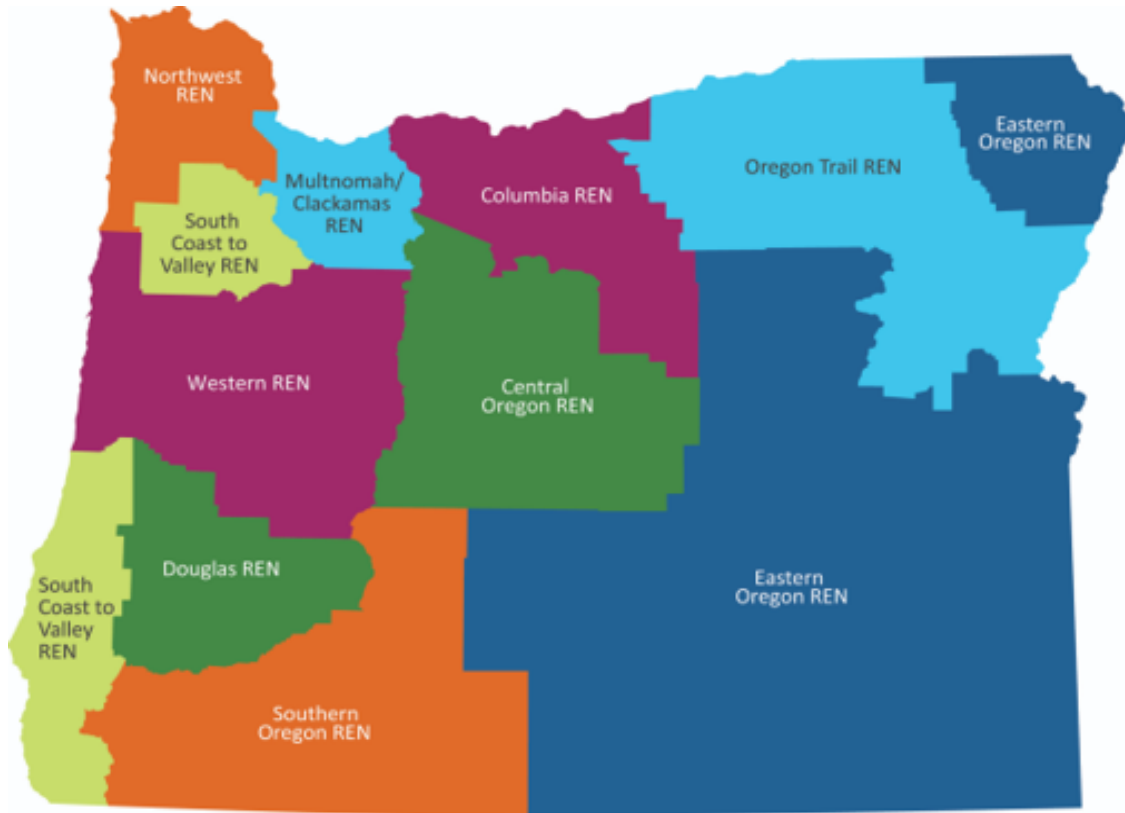
Mercedes Jones, Senior Policy Analyst, Educator Networks & Professional Learning, she/her

Educator Advancement Council

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# EAC Regional Educator Network: Program Overview



***10 regional partnerships, facilitate by 10 ESDS who serve all 197 school districts, focused on centering educator voices to strengthen the educator workforce from recruitment to retirement through offering ongoing professional development, mentoring, and career advancement opportunities.***

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# EAC Regional Educator Network: Program Overview

Per [SB 182](#) and [ORS 342.940-953](#), the EAC is charged with ensuring the RENs provide educators with access to services and resources that that accomplish **five specific policy goals**:

1. Provide open access to **high-quality and culturally responsive professional learning** and support for Oregon educators that *reflects teacher voice*, local contexts, stages of an educator's career
2. Enhance a **culture of leadership and collaborative responsibility** that elevates and advances the teaching profession
3. Strengthen and enhance **existing evidence-based practices that improve student achievement** and reflect changing students' needs and demographics.
4. Improve the recruitment, preparation, induction, and support of educators **at each stage of the educators' careers**.
5. Enhance leadership and career advancement opportunities for teachers and **increase the perspectives of teachers** in identifying priorities for funding educator professional learning and educator supports.

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# EAC Regional Educator Network: Program Overview

REN programs across Oregon **vary in their approach to educator systems of support**, but each REN:

- Is **led by a Coordinating Body** representing local educators, leaders, communities and education organizations
- **Provides** infrastructure, technical assistance, professional learning opportunities and **funding to localized investments**
- Deploys multiple engagement strategies to **engage teachers and administrators** to identify local needs to inform distribution of state dollars
- Works towards **statewide goals and common measures**

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# Rulemaking

1. Notification and Engagement

2. ODE Ongoing Rules Community  
Advisory (ORCA)

**EAC Advising and Approval**

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3. State Board of Education

# Regional Educator Network Rule Revisions

- In 2017, the Oregon Legislature directed the Council to establish, fund, and monitor Regional Educator Networks, through which every educator in the state will have access to professional learning and career advancement support (ORS 342.940, ORS 342.943).
- In 2019, the State Board of Education adopted rules that describe definitions, fund uses, selection criteria and processes for REN Sponsoring Organizations, eligibility and requirements of REN Member Organizations, requirements of REN Plans and uses of grant funding, and reporting (OAR 581-012-0001 through 581-012-0019).

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# Regional Educator Networks Rule Revisions

## REN Rule Sections for Revision:

- Definitions (581-012-0001)
- Sponsoring Organizations requirements (581-012-0007)
- Criteria for selecting Sponsoring Organizations (581-012-0009)
- Member Organization (581-012-0010)
- REN Plan Process (581-012-0011)
- Capacity and Formula Funding (581-012-0013-15)

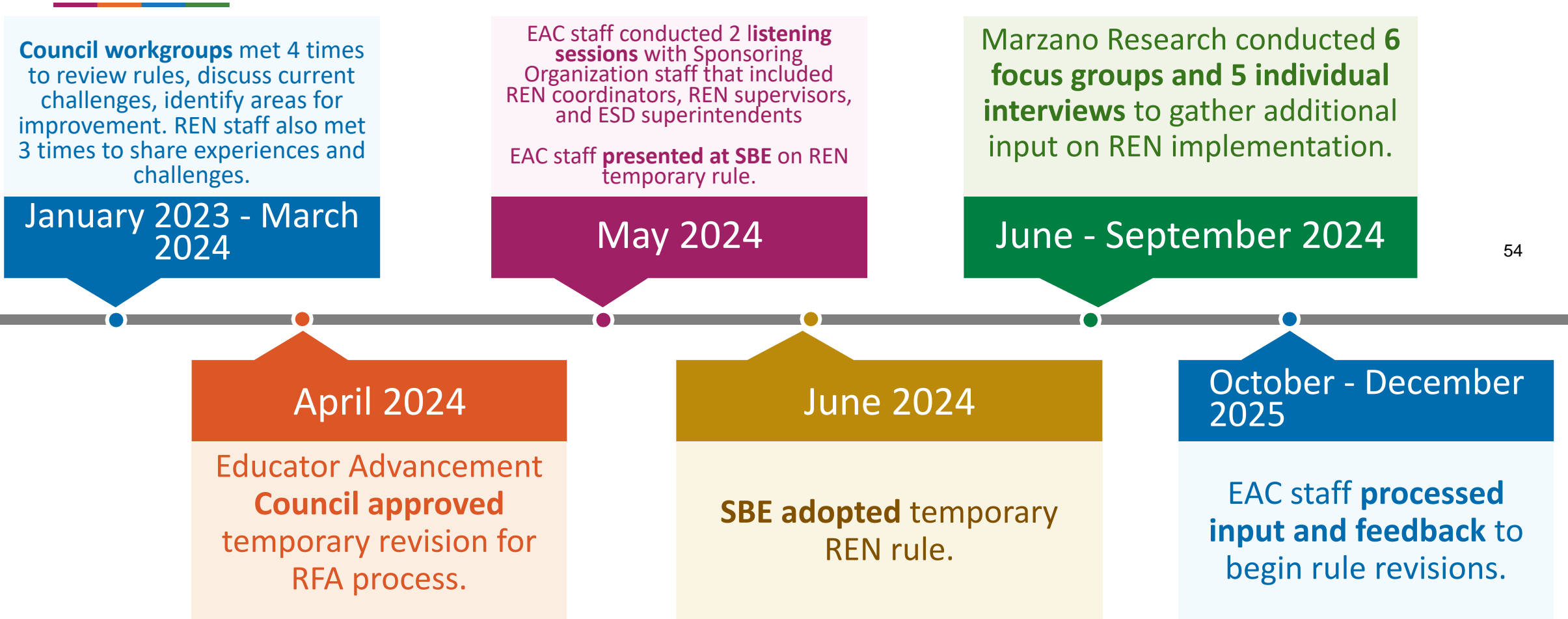
# EAC Regional Educator Network: Engagement Strategy

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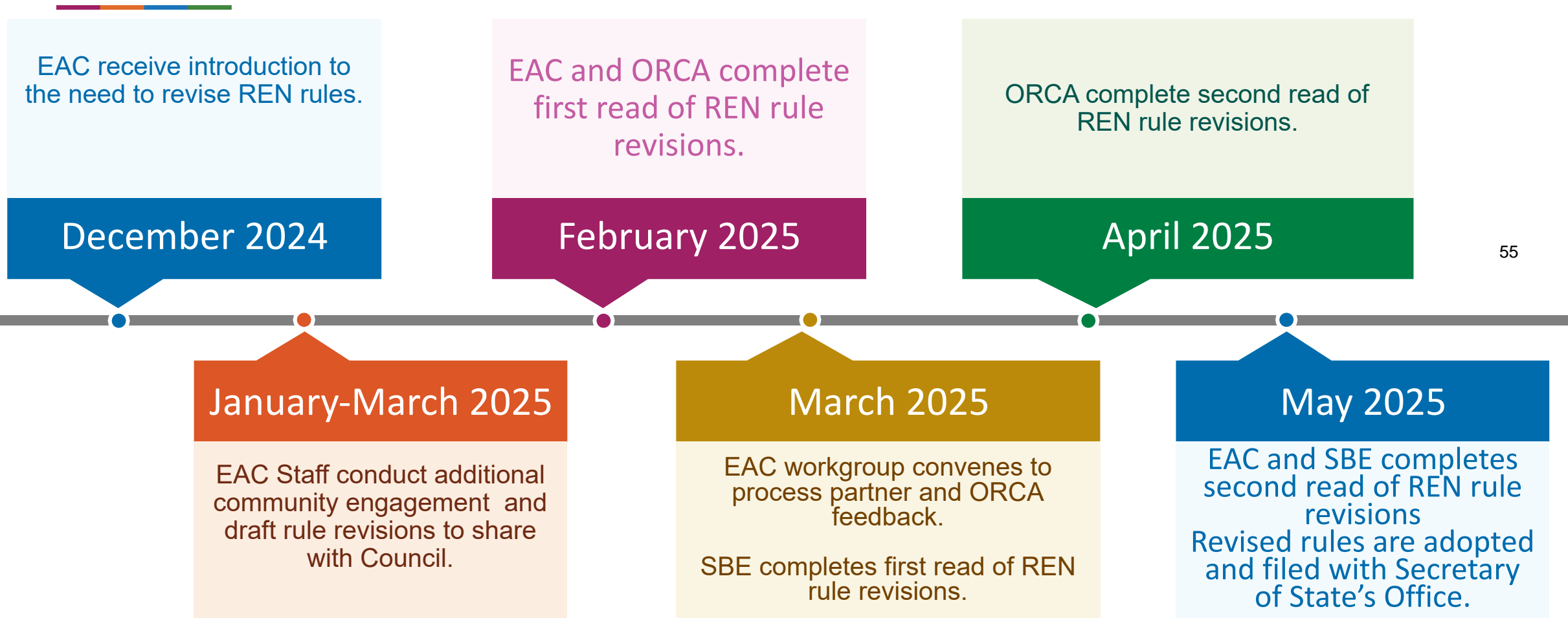
## Focus Groups:

- **EAC Directors** with representation from **early learning, K-12 educators, and community organizations**
- **ESD Superintendents** who sponsor RENs, with voices from all ten regions with an emphasis on **rural and remote ESDs**<sup>53</sup>
- **Regional Educator Network staff**, with voices from all ten regions with an emphasis on **rural and remote ESDs**
- **Education representatives** from the **nine federally recognized Tribes of Oregon**

# Engagement Timeline: Jan 2023 - Dec 2025



# Engagement Timeline: Looking Ahead



# EAC Regional Educator Network: Definitions (581-012-0001)

Challenge	Summary of Revisions	
<p>There are incomplete or missing terms that require definition for effective program implementation</p>	<p><b>Added Terms</b></p> <ul style="list-style-type: none"> <li>● Formula Funds</li> <li>● Capacity Funds</li> <li>● Professional Learning Plans</li> <li>● Regional Educator Network Plan</li> <li>● Design Team</li> <li>● Continuous Improvement</li> <li>● High-quality Professional Learning</li> <li>● Participant</li> <li>● Early Learning Provider</li> <li>● Consortium</li> </ul>	<p><b>Revised Terms</b></p> <ul style="list-style-type: none"> <li>● Regional Educator Network</li> <li>● Technical Assistance</li> <li>● Sponsoring Organization</li> <li>● Member Organization</li> <li>● Educator (to match statute)</li> <li>● Coordinating Body</li> <li>● Fiscal Agent</li> </ul>

# EAC Regional Educator Network: Sponsoring Organizations requirements (581-012-0007)

Challenge	Summary of Revisions
Current rules interchangeably use REN and Sponsoring Organization when describing responsibilities required by the Sponsoring Organization	Replace Regional Educator Network with Sponsoring Organization to clarify what the Sponsoring Organization is required to do
Unclear responsibilities of a Sponsoring Organization to meet the requirements of OARs and the RFA	Add language that articulates what a Sponsoring Organization <b>must</b> do in order to meet the requirements of the OARs and RFA
The EAC does not have a process or criteria to assess if a Sponsoring Organization is in compliance with the requirements of the OARs or RFA	Add language that describes a process and criteria for EAC to use to assess compliance of a Sponsoring Organization

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# EAC Regional Educator Network: Criteria for selecting Sponsoring Organizations (581-012-0009)

<b>Challenge</b>	<b>Summary of Revisions</b>
<p>Current process (articulated in rules) requires a competitive application process each biennium (usually a 9-12 month process at ODE), which creates inefficiencies, instability and inequities for Sponsoring Organizations and REN implementation.</p>	<p>Removes the requirement to do a Request For Application (RFA) each biennium. <span style="float: right;">58</span></p> <p>Identifies specific circumstances that would require a RFA to select a new Sponsoring Organization.</p>

# EAC Regional Educator Network: Member Organization (581-012-0010)

<b>Challenge</b>	<b>Summary of Revisions</b>
Current rules are not inclusive of critical Educators who serve in roles at ESDs and Education Departments within the nine federally recognized Tribes	Adds federally recognized tribes and education service <sup>59</sup> districts to eligible member organizations

# EAC Regional Educator Network: Member Organization (581-012-0010)

Challenge	Summary of Revisions
<p>Current rules identify a process for Member Organizations to make opt-out or reassignment requests, but the process does not ensure that the EAC can further the purpose and intent of the RENs (ensuring access to professional learning and support for all educators).</p>	<p>Removes the option for member organizations to opt-out</p> <p>Adds language that allows the Council to update boundary lines of a region if a reassignment request is approved</p>
<p>Current rules do not clearly articulate the role and responsibilities of Member Organizations</p>	<p>Adds language that describes:</p> <ul style="list-style-type: none"> <li>● How member organizations can engage in a REN</li> <li>● The role and responsibility of a member organization if they engage in the REN</li> </ul>

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# EAC Regional Educator Network: REN Plan Process (581-012-0011)

<b>Challenge</b>	<b>Summary of Revisions</b>
Current rules do not define a clear purpose, process or criteria for the EAC to evaluate and approve REN Plans.	Adds language to clarify the purpose of the Plan  Added language the describes the criteria the EAC will use to evaluate and approve REN plans.  Also adds language that articulates a process in the event a REN plan is not approved

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# EAC Regional Educator Network: Capacity and Formula Funding (581-012-0013-15)

<b>Challenge</b>	<b>Summary of Revisions</b>
Current rules do not articulate the purpose for capacity and formula funds or what they can be used for	Added language that clearly defines allowable costs for Capacity and Formula Funds

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# EAC Regional Educator Network: Equity Impact

- Creating consistency and clear expectations of roles and responsibilities ensures the EAC and REN programs can be responsive and supportive of all Educators across the state, with a focus on those who experience the largest disparities
- It also ensures fewer disruptions to funding for REN projects and services that focus on supporting rural educators, educators of color and Indigenous educators in the regions

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# EAC Regional Educator Network: Fiscal Impact

- Regional Educator Networks receive more than \$42 million in funds across the state.
- Reducing administrative burden with RFA processes and streamlining reporting processes will reduce the administrative impact on Sponsoring Organizations and districts who receive services and supports from RENs

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# Questions



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## Summary

**Meeting Date:** 3/13/2025

**Title:** Funding Administrative Accounting Fixes

**Status:** First Reading

**Presentation:** Yes

**Key Staff:** Brittany Deckard & Cassie Medina

**Topic Summary:** Current funds administration rules of Student Investment Account (SIA), High School Success (HSS), and Early Literacy (ELSSDG) state that funds allocations are calculated on an annual basis. The rule change would shift to calculating allocations biennially for SIA, HSS, and ELSSDG reducing the administrative steps and expediting access to funds in the second year of the biennium. Technical fixes include adding rule language addressing fund reallocation in the instance of public charter closures and allowing SIA funds to be expended through the full biennium.

## 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 Student Investment Account (SIA), High School Success (HSS), and Early Literacy Success School District Grants (ELSSG) are situated with the Integrated Guidance. Non-competitive grants funds are distributed to eligible grantees to address mental and behavioral health and reduce academic disparities, improve high school graduation rates and pathways for post-secondary opportunities, and strengthen early literacy. Fund administration rules inform how funds are allocated to grantees in service of implementation efforts in alignment with the goals of each program.

- 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 3427 (2019), HB 3198 (2023), Measure 98 (2016) grant authority to the Board to adopt rules necessary for the administration and distribution of named grants. The statutes are explicit in

# Oregon State Board of Education Docket



naming allowable areas of spending and use of ADMw to calculate allocation. The Board has discretion to determine percentages and timelines for installment payments and establish rules necessary for the distributes of grant funds.

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

This rule set came before the board in December 2024 and board approved a rule change to amend the date by which grantees can expend funds to June 30 to ensure that funds are spent in the biennium in which they are appropriated.

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

This item is coming before the Board as part of an effort to streamline and expedite grant agreements and amendments to make funds available to districts in a timely manner.

**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**

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*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?**

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Nearly all eligible grant recipients of SIA, HSS, and ELSSG will be affected by this rule change. Engagement efforts focused on direct recipients of SIA, HSS, and ELSSG funds. The engagement process included input from education partners including OASBO, COSA, and OSBA. Additionally, school superintendents and school business managers were convened to provide direct feedback.

**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.**

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: Statewide

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

Every geographical region in Oregon was represented through engagement efforts. The impact of the change varies across district size and context regardless of geographical region.

### 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?

There is broad support to allow SIA funds allocated in the first year of the biennium to be spent until the end of the biennium instead of June 30 annually.

Many districts are experiencing flat or declining enrollment, and a biennial allocation may help to maintain stable funding amount both years of a biennium.

Additionally, many districts have seen enrollment stabilize and are experiencing increasing enrollment and the increase would be reflected in the allocation annually. This has impacted the development of this item. To be responsive to the feedback it is necessary to explore pathways to increase grant allocations for grantees that experience an increase in enrollment in the second year of the biennium.

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

Additional internal engagement is necessary to determine whether increases in enrollment can be addressed in grant agreements and/or if additional rule language is necessary.

## FISCAL AND ADMINISTRATIVE IMPACT ANALYSIS

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*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.

The rule set will have fiscal and administrative impact on districts. Districts will experience reduced administrative requirements in the grant making process through a reduction in the

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overall grant agreements that are executed to receive funding. Allowing SIA funds to be spent until the end of the biennium will allow for year 1 funding to carryover a reducing the occurrence of annual fiscal returns. In both the short- and long-term grant allocations set biennially will mitigate funding fluctuations experienced because of declining enrollment. Fluctuations in funding due to enrollment have a significant impact on small districts and often impact staffing levels. It is necessary to create a pathway to increase allocations based on increasing enrollment to ensure the allocation reflects the current student population.

**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?**

No

### **EQUITY IMPACT ANALYSIS**

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*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?**

This action can help stabilize funding between year 1 and 2 of a biennium and allow for cohesive implementation of SIA, HSS, and Early Literacy which prioritize reducing academic disparities for focal student groups. When a district sees an increase in enrollment the corresponding allocation increase would not occur until the new biennium requiring the districts to serve more students with the same allocation.

**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?**

Stable funding can help mitigate the need for staff reductions related to declining enrollment.

**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?**

In the short and long-term this change reduces administration steps required to execute grant agreements and distribute funds. Cumulatively in the short and long term, funding reductions will be mitigated for districts with declining enrollment; however, funding increases due to increasing enrollment would occur biennially. The ODE is actively working on a solution to address the latter.

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

In the short-term, grant allocations would continue to be calculated annually, and grant agreements and amendments would be issued each year. Funding amounts for these grants would fluctuate in year 2 of the biennium based on increase or decrease in enrollment.

**RECOMMENDED ACTION**

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*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?**

Technical fix:

-Language added to 581-013-0015 (HSS) and 581-014-0004 (SIA) describing the reappropriation of funds in the case of a public charter school closure.

-Changes language in 581-014-0004 (SIA) to allow funds to be expended until June 30 of year two of each biennium

Desired action for the Board to accept these changes.

Change for fund administration of SIA, HSS, and ELLSSG to use the most current finalized ADMw from the State School Fund from the year prior to the start of each biennium, instead of from the prior year.

Desired action for the Board to accept this change when ODE proposes a pathway to accommodate for districts when enrollment increases.

**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 language is responsive to feedback related to the need for stabilized funding for districts experience declining enrollment. Feedback related to districts with an increase in enrollment still needs to be addressed. Pathways to address the feedback are in process including determining if this can be addressed through grant agreement language.

**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.**

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Streamlining the grant making process and reducing barriers to distribute funding centers our commitment to academic excellence, belonging and wellness, and reimaging accountability by ensuring that distributes have uninterrupted access to funds to implement SIA, HSS, Early Literacy addressing each of those areas.

### 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.

[581-014-0004](#)

**Fund Administration for Student Investment Account**

(1) For each biennium, the Oregon Department of Education will determine the amount of grant funds from the Student Investment Account to be apportioned among eligible applicants.

(2) For purposes of establishing the amount of grant funds apportioned to eligible applicants, the Oregon Department of Education will use the most current finalized ADMw from the State School Fund from the prior year-year prior to the start of each biennium.

(3) If a school district has an ADMw of 50 or less, it will receive an allocation based on an ADMw of 50.

(4) If an eligible applicant does not apply for a grant from the Student Investment Account by the close of the application period, the amount of their grant funds will revert to the Student Investment Account and be reallocated within the grant award cycle. An eligible applicant that does not apply for a grant will be eligible in the next application process for the Student Investment Account.

(5) Following approval of the grant agreement, an eligible recipient will receive payments of at least 25-12.5 percent on a quarterly basis per annual-biennial allocation. If adjustments to installment payments are required, a lower percentage may be used.

(6) Grant recipients will be eligible to expend funds until June 30 of each-year-year two of the biennium. Any allocated funds that are not used by a grant recipient by June 30 each-year-of year two of the biennium will be returned to the Student Investment Account for distribution in the next biennium.

(7) Funds received by a grant recipient under this section must be separately accounted for and must be used in accordance with the recipient's grant agreement for the Student Investment Account. A grant recipient may use funds for administrative costs, including indirect costs, directly related to allowed expenditures as provided in the grant agreement. Administrative costs are limited to five percent of the total expenditures or \$500,000 annually, whichever is less. Any administrative costs incurred by a participating charter school must be accounted for within the sponsoring school district's overall limit of five percent or \$500,000, whichever is less.

(8) The Deputy Superintendent of Public Instruction shall resolve any issues arising from the administration of the Student Investment Account grants not specifically addressed by this rule. The Deputy Superintendent of Public Instruction's determination shall be final.

(9) In the case of a public charter school closure that impacts a sponsoring district's allocation, the Department will determine the best way to reapportion funds based on the timing of the closure, context, and communication with the closing charter school and the sponsoring district. The Department may;

(a) Allocate what have been apportioned to the charter school to the sponsoring district at the same time as the district allocations are made.

(b) Allocate what would have been apportioned to the charter school to the charter schools successor entity.

(c) Return the apportioned amount to the Statewide Education Initiatives Account for reallocation in a subsequent fiscal year.

### **581-013-0015**

#### **Fund Administration (Measure 98- [2016])**

(1) For each biennium, the Oregon Department of Education shall determine the total amount of funds to be apportioned among the eligible school districts and charter schools for ~~each year~~ ~~of~~ the biennium.

(2) For purposes of establishing the amount of grant funds apportioned to eligible applicants, the Oregon Department of Education will use the most current finalized ADMw from the State School Fund from the ~~prior year~~ year prior to the start of the biennium.

(3) Grant recipients will be eligible to expend funds until June 30 of year two of the biennium. Any allocated funds that are not used by a grant recipient by June 30 in year two of the biennium will be returned to the High School Graduation and College and Career Readiness Fund for distribution in the next biennium.

(4) Funds received by a school district or charter school under this section must be separately accounted for and must be used in accordance with the school district or charter school's approved biennial plan.

(5) In the case of a public charter school closure that impacts a sponsoring district's allocation, the Department will determine the best way to reapportion funds based on the timing of the closure, context, and communication with the closing charter school and the sponsoring district. The Department may;

(a) Allocate what have been apportioned to the charter school to the sponsoring district at the same time as the district allocations are made.

(b) Allocate what would have been apportioned to the charter school to the charter schools successor entity.

(c) Return the apportioned amount to the Statewide Education Initiatives Account for reallocation in a subsequent fiscal year.

[581-017-0809](#)

**Early Literacy Success School District Grants: Fund Administration**

(1) For each biennium, The Oregon Department of Education will determine the amount of grant funds from the Statewide Education Initiatives Account to be apportioned among eligible applicants for ~~each year of~~ the biennium.

(2) For the 2024-2025 school year, the Oregon Department of Education shall determine the portion of funds available to each eligible applicant, using K-5 data. In calculating the portion available to each eligible applicant, the Oregon Department of Education shall use the most current finalized ADMw from the State School Fund from the prior year.

(3) For the 2025-2026 school year and thereafter, the Oregon Department of Education shall determine the portion of funds available to each eligible applicant, using K-3 data. In calculating the portion available to each eligible applicant, the Oregon Department of Education shall use the most current finalized ADMw from the State School Fund from the ~~prior year~~ year prior to the start of the biennium.

(4) The department will determine floor funding for each biennium while ensuring eligible applicants with an ADMw of 50 or less, but not greater than 350 ADMw, will receive a minimum grant award.

(5) If an eligible applicant does not apply for the Early Literacy Success School Grant by the close of the application period, the amount of their grant funds will revert to the Statewide Education Initiatives Account.

(6) Following approval of the grant agreement, an eligible recipient will receive payments of at least 25 percent on a quarterly basis per annual allocation. If adjustments to installment payments are required, a lower percentage may be used.

(7) Grant recipients will be eligible to expend funds until June 30 of year two of the biennium. Any allocated funds that are not used by a grant recipient by June 30 in year two of the biennium will be returned to the Statewide Education Initiatives Account for distribution in the next biennium.

(8) Funds received by a grant recipient under this section must be separately accounted for and must be used in accordance with the recipient's grant agreement for the Early Literacy Success School Grant. A grant recipient may use funds for administrative costs, including indirect costs, directly related to allowed expenditures as provided in the grant agreement. Administrative costs are limited to five percent of the total expenditures.

(9) The Deputy Superintendent of Public Instruction shall resolve any issues arising from the administration of the Early Literacy Success School Grants not specifically addressed by this rule. The Deputy Superintendent of Public Instruction's determination shall be final.

(10) In the case of a public charter school closure that impacts a sponsoring district's allocation, the Department will determine the best way to reapportion funds based on the timing of the

closure, context, and communication with the closing charter school and the sponsoring district. The Department may;

(a) Allocate what have been apportioned to the charter school to the sponsoring district at the same time as the district allocations are made.

(b) Allocate what would have been apportioned to the charter school to the charter schools successor entity.

(c) Return the apportioned amount to the Statewide Education Initiatives Account for reallocation in a subsequent fiscal year.

(11) An eligible applicant must advance the Early Literacy Success Plan with at least a 25 percent match of the allocation using any other fund sources available to the applicant.

(a) Eligible applicants are required to report the matching fund source in their application.

(b) Any eligible applicant with an ADMw of 50 or less is exempt from the matching requirement.

(c) For the 2024-2025 school year, eligible applicants may use match funding broadly to support literacy across prekindergarten through 5th grade.

(d) For the 2025-2026 school year and thereafter, eligible applicants may use match funding broadly to support literacy across prekindergarten through 3rd grade.

(12) Rules will be applied by ODE for fund administration of the Early Literacy Success Initiative beginning immediately after temporary OAR's 581-017-0800 and 581-017-0810 expire March 29, 2024.

**Statutory/Other Authority:** ORS 327.829 & ORS 327.833

**Statutes/Other Implemented:** ORS 327.825 to 327.837

**History:**

[ODE 13-2024, adopt filed 03/22/2024, effective 03/22/2024](#)



OREGON  
DEPARTMENT OF  
EDUCATION

# Student Investment Account (SIA), Early Literacy, and High School Success (HSS) Fund Administration

Cassie Medina, Assistant Superintendent, she/her  
Brittany Deckard, Director of Grant Management & Monitoring, she/her  
*Office of Education Innovation & Improvement*

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# Purpose

Request revision to the fund administration rules for Student Investment Account (SIA), High School Success (HSS), and Early Literacy Success School District Grants (ELSSDG) to calculate grant allocations and distribute funds to grantees on a biennial basis.



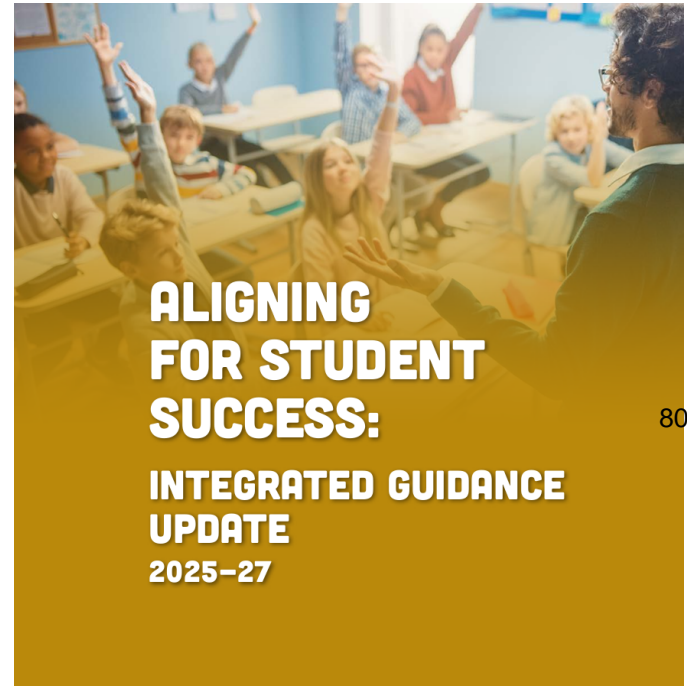
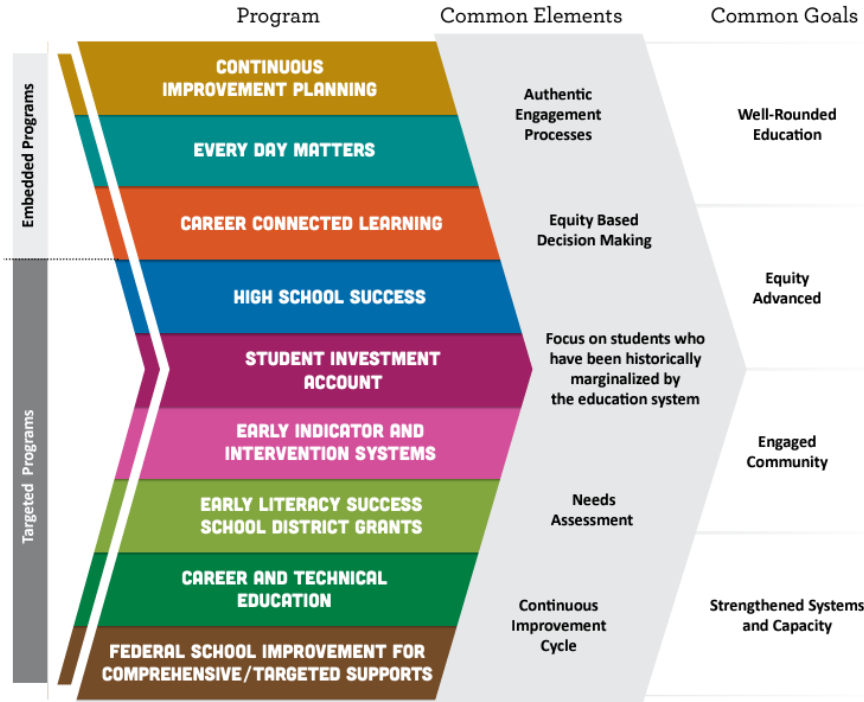
# Fund Administration

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Measure 98 (2016): High School Graduation and College and Career Readiness Act, HB 3427 (2019): Student Success Act, HB 3198 (2023): Early Literacy Success Initiative grant authority to the Board to adopt rules necessary for the administration and distribution of named grants



# Funding Administration: Program Overview



# Rationale for Fund Administration Rule Changes



Oregon Department of  
Education

- Reduce administrative steps required to distribute funds in the second year of the biennium and ensure grantees have access to funds throughout the biennium.
- Bring the fund administration of SIA, HSS, and ELSSDG into administrative alignment under the Integrated Guidance.

# Fund Administration: Current Rules

OAR	Current Rules
<a href="#"><u>581-014-0004</u></a> - SIA Fund Administration	<ul style="list-style-type: none"><li>-Grantees must expend funds by June 30, <b>annually</b>.</li><li>-Uses most current finalized ADMw from State School Fund to calculate allocation annually</li></ul>
<a href="#"><u>581-013-0015</u></a> - HSS Fund Administration	<ul style="list-style-type: none"><li>-Grantees must expend funds by June 30, <b>biennially</b>.</li><li>-Uses most current finalized ADMw from State School Fund<sub>82</sub> to calculate allocation annually</li></ul>
<a href="#"><u>581-017-0809</u></a> - ELSSDG Fund Administration	<ul style="list-style-type: none"><li>-Grantees must expend funds by June 30, <b>biennially</b>.</li><li>-Language addressing closure of public charter</li><li>-Uses most current finalized ADMw from State School Fund to calculate allocation annually</li></ul>

# Fund Administration: Summary of Changes

OAR	Summary of Change
<a href="#"><u>581-014-0004</u></a> - SIA Fund Administration	<ul style="list-style-type: none"><li>-Use most current finalized ADMw from State School Fund to calculate allocation <b>biennially</b></li><li>-Grantees must expend funds by June 30, <b>biennially</b>.</li><li>-<b>Add public charter closure language</b></li></ul>
<a href="#"><u>581-013-0015</u></a> - HSS Fund Administration	<ul style="list-style-type: none"><li>-Use most current finalized ADMw from State School Fund to calculate allocation <b>biennially</b></li><li>-<b>Add public charter closure language</b></li></ul>
<a href="#"><u>581-017-0809</u></a> - ELSSDG Fund Administration	Use most current finalized ADMw from State School Fund to calculate allocation <b>biennially</b>

# Fund Administration: Summary of Changes



Technical Fixes included in rule change:

- Add rule language, currently in ELSSDG rule, addressing fund reallocation in the case for public charter school closure to SIA and HSS rule set
- Extend eligibility to expend SIA funds until June 30 of year two of each biennium in alignment with HSS and ELSSDG

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# Funding Administration: Fiscal Impact

Reduces administrative burden on grantees by eliminating the need for grant amendments to be issued for funding in the second year of the biennium.

Expedites access to funding in the second year of the biennium

Allows full SIA biennial allocation to be spent through the end of each biennium

Stabilizes funding for districts experiencing declining enrollment

Allocation calculated biennially will not reflect any annual increase in enrollment

Minimal impact to small districts receiving floor funding (153 for ELSSDG and 13 for SIA)

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# Funding Administration: Equity Impact

Ensuring uninterrupted access to SIA, HSS, and Early Literacy funds throughout the biennium will allow for cohesive implementation of programs, especially during the summer months with opportunities for extended learning.

Mitigates fluctuations in allocations between year 1 and year 2 of the biennium

- Stabilizes funding for districts experiencing declining enrollment
- Allocation calculated biennially will not reflect any annual increase in enrollment

# Fund Administration: Engagement Strategy

Conduct engagement with representative of districts from each region across the state and varying district size.

- ❑ Educational Partners

- ❑ OASBO, COSA, OSBA

- ❑ Engage with school district leaders

- ❑ Small District Superintendents Collaborative
  - ❑ School Business Officers

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## Fund Administration: SIA, HSS, and Early Literacy



Oregon Department of Education

## Engagement Feedback:

- Overall support for technical fixes included in rule change proposal
- Support for the intent to streamline grant making and stabilize funding for districts experiencing declining enrollment
- Concern from districts with increasing enrollment to calculate allocation on a biennial basis instead of annually

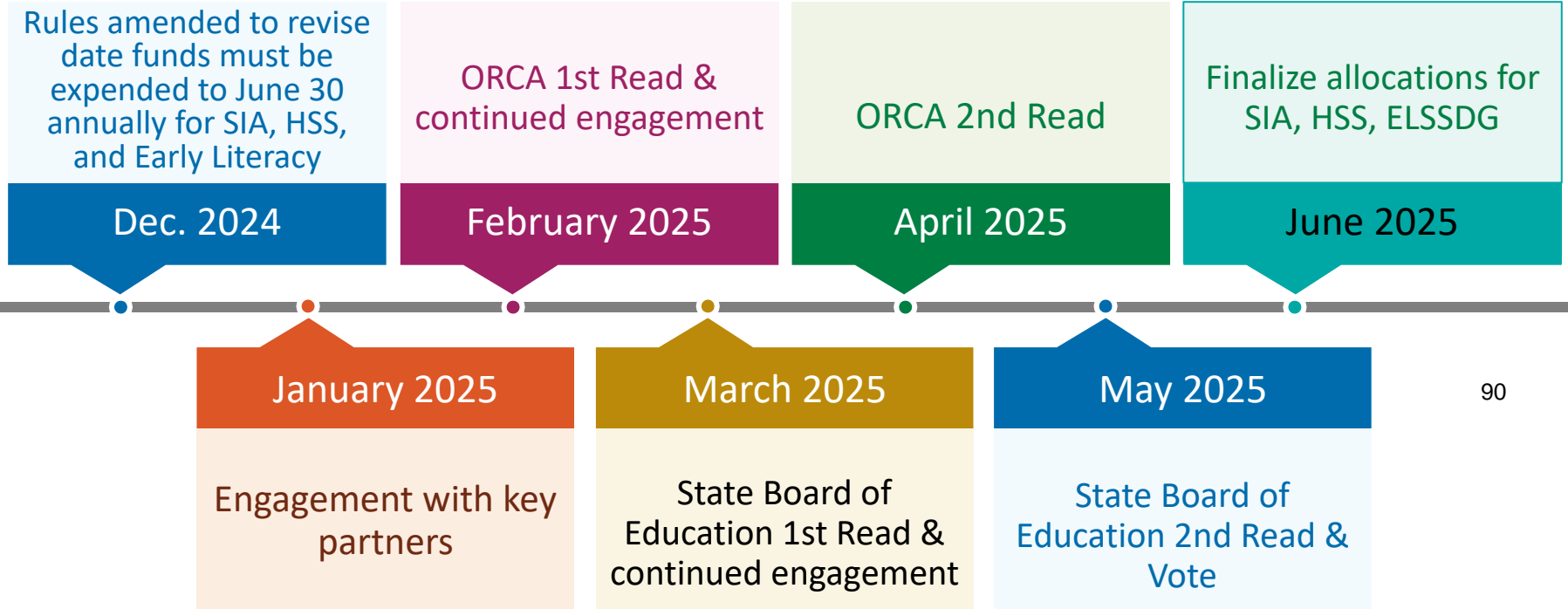
## Next Steps



ODE to explore pathways, either in rule or grant agreement language, to address feedback from districts seeing increases in enrollment.

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# Funding Administrative Account Fixes: Timeline



# Questions?



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## Summary

**Meeting Date:** 3/13/2025

**Title:** Student Records and Conditions for Disclosure

**Status:** Adoption (no changes)

**Presentation:** Yes

**Key Staff:** Karin Moscon, Thea Conbere

**Topic Summary:** ODE has received concerns from schools and districts about a disconnect between Oregon student record collection and disclosure and the Sanctuary Promise laws. These amendments will help align school practices with Sanctuary Promise laws.

## 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?**

Under current ODE rules, districts may collect and disclose sensitive student information, including a student’s place of birth, address, and contact information, to any party, for any purpose, unless a parent knows to request that such information not be shared. Additionally, place of birth is information included in a student’s permanent record, which implies that districts should or can collect place of birth information from students.

Additionally, current OARs allow for the disclosure of student place of birth, citizenship status, or other information pursuant to a subpoena from a non-judicial source for the purpose of enforcement of federal immigration laws, which does not align with Oregon Sanctuary Promise laws.

- 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



ORS 180.805 (Sanctuary Promise law): The Sanctuary Promise Act (HB 3265 (2021)) prevents local government agencies, including school districts, from requesting information concerning a person’s citizenship or immigration status or disclosing certain information for the purpose of enforcing federal immigration laws without a judicial order.

ORS 326.565 (Standards for student records): gives the State Board of Education authority to adopt rules for the creation, use, and disclosure of student education records.

**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 not come before the Board before.

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

School, district, and ODE staff requests for clarification on what student information is allowed to be collected and disclosed in compliance with Oregon regulations and Sanctuary Promise laws.

**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.*

## Oregon State Board of Education Docket



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?

This is based on a request from school districts who are asking for guidance/clarification. We have asked questions on how best to proceed to Oregon DOJ. We reached out to student success specialists, the Office of Indian Education, staff working with emergent multilingual students as representatives of the communities they work with, as well as staff from OSBA and COSA, representing the interests of school districts. Because of the urgency of this temporary rule, we have not yet conducted the outreach that we plan to for the permanent rule.

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: State Archives

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.

The State Archives provides definitions and retention rules around student records. They have communicated they are currently reviewing rules regarding student records and are planning changes that would align with this proposed rule.

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

- Northeast Oregon

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- 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)?

This change would have a statewide impact.

## 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?

Some key pieces of feedback included keeping student photographs in the definition of directory information so as to not disrupt the distribution of yearbooks, play bills, etc. We decided to keep photograph in the definition for this temporary rule and conduct additional engagement on the subject for the permanent rule. Other feedback included suggesting updates to further alignment with FERPA and suggestions to explicitly limit immigration and citizenship information from directory information and permanent record. We believe those suggestions are useful and require more examination and engagement than we have time for with this temporary rule.

Lastly, in response to concerns we received during ORCA, we removed some minor changes in this amendment for concerns not directly connected to the language of the Sanctuary Promise laws and provided an extended date for the changes to the definition of a permanent record.

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

Since this is a temporary rule, we will be pursuing additional engagement opportunities when working on the permanent rule.

## FISCAL AND ADMINISTRATIVE IMPACT ANALYSIS

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*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

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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.**

A small administrative impact is expected as districts adjust their policies around enrollment and student information collection. Additionally, districts will need to ask for parent or eligible student consent to disclose certain information. Districts may need to meet with SIS vendor to alter enrollment forms.

**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?**

None predicted.

## **EQUITY IMPACT ANALYSIS**

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*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?**

This amendment will help protect the privacy rights of all students, but particularly the rights of immigrant students. A recent Department of Homeland Security memo rescinded schools' protection from ICE activity, which can have a chilling effect on immigrant students enrolling and attending school. These rule changes will help ensure that districts are not collecting or disclosing student information relating to citizenship or immigration status in order to align with Oregon Sanctuary laws.

**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?**

No impact predicted.

**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?**

## Oregon State Board of Education Docket



The cumulative effect would be the ways schools and districts collect and share student information.

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

Inaction on this item would continue confusion among school districts around what information they are allowed to collect from students and disclose to third parties or in response to non-judicial subpoenas. This confusion would have a chilling effect on students enrolling and attending school as well as put immigrant students in danger of having their sensitive information unlawfully disclosed to federal immigration authorities.

### **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?**

OAR 581-021-0220 is amended to remove the following from the list of what may be included in directory information: a student's address, telephone listing, electronic mail address, date and place of birth, and the most recent previous educational agency or institution attended. Additionally, this amendment removes a student's place of birth and social security number from the definition of a student's permanent record.

OAR 581-021-0371 is amended to state that an educational agency or institution may not disclose certain student information (primarily, a student's address, contact information, citizenship, and immigration status) to comply with a subpoena issued for the purpose of enforcement of federal immigration laws unless required by a court order or a warrant authorized by a court.

**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](#)?**

This amendment aligns with the board mission, vision, and values because what brought this to our attention in the first place was recognizing the chilling effect on immigrant students current district and ODE practices have on enrollment and the sharing of student records.

**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.**

## Oregon State Board of Education Docket



We are recommending the board adopt these temporary rules to immediately bring ODE regulations into alignment with Oregon Sanctuary laws in order to support schools and districts as they create safe environments for students to attend school.

**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.

## 581-021-0220:

### Definitions

As used in OAR 581-021-0220 through 581-021-0440, the following definitions apply:

(1) "Attendance" includes, but is not limited to:

(a) Attendance in person or by correspondence; and

(b) The period during which a person is working under a work-study program.

(2) "Directory Information" means those items of personally identifiable information contained in an education record of a student which would not generally be considered harmful or an invasion of privacy if disclosed. Directory information may include, ~~and is not limited to,~~ the student's name, ~~address, telephone listing, electronic mail address,~~ photograph, ~~date and place of birth,~~ major field of study, participation in officially recognized activities and sports, weight and height of members of athletic teams, dates of attendance, and degrees and awards received, ~~and the most recent previous educational agency or institution attended.~~

(3) "Disclosure" means to permit access to or the release, transfer, or other communication of education records, or the personally identifiable information contained in those records, to any party, by any means, including oral, written, or electronic means.

(4) "Disciplinary action or proceeding" means the investigation, adjudication, or imposition of sanctions by an educational agency or institution with respect to an infraction or violation of the internal rules of conduct applicable to students of the agency or institution.

(5) "Educational Agency or Institution" means any public or private school, education service district, state institution, private agency or youth care center providing educational services to students birth through age 21, and through Grade 12, that receives federal or state funds either directly or by contract or subcontract with the Department under any program administered by the U.S. Secretary of Education or the Department.

(6) "Education Records":

(a) The term means those records that are directly related to a student and maintained by an educational agency or institution or by a party acting for the agency or institution;

(b) The term does not include:

(A) Records of instructional, supervisory, and administrative personnel and educational personnel ancillary to those persons that are kept in the sole possession of the maker of the

record, are used only as a personal memory aid, and are not accessible or revealed to any other person except a temporary substitute for the maker of the record;

(B) Records of the law enforcement unit of an educational agency or institution, subject to the provisions of OAR 581-021-0225.

(C) Records relating to an individual who is employed by an educational agency or institution, that are made and maintained in the normal course of business, that relate exclusively to the individual in that individual's capacity as an employee and that are not available for use for any other purpose. Records relating to an individual in attendance at the agency or institution who is employed as a result of his or her status as a student are education records and not excepted under this subsection;

(D) Records on a student who is 18 years of age or older, or is attending an institution of postsecondary education, that are:

(i) Made or maintained by a physician, psychiatrist, psychologist, or other recognized professional or paraprofessional acting in his or her professional capacity or assisting in a paraprofessional capacity;

(ii) Made, maintained, or used only in connection with treatment of the student; and

(iii) Disclosed only to individuals providing the treatment. For the purpose of this definition, "treatment" does not include remedial educational activities or activities that are part of the program of instruction at the agency or institution.

(E) Records that only contain information relating to activities in which an individual engaged after he or she is no longer a student at that agency or institution;

(F) Medical or nursing records which are made or maintained separately and solely by a licensed health care professional who is not employed by the educational agency or institution, and which are not used for education purposes of planning.

(7) "Eligible Student" means a student who has reached 18 years of age, or a student who is attending only an institution of postsecondary education and is not enrolled in a secondary school.

(8) "Institution of Postsecondary Education" means an institution that provides education to students beyond the secondary school level; "secondary school level" means the educational level (not beyond Grade 12) at which secondary education is provided.

(9) "Parent" means a parent of a student and includes a natural parent, a guardian, an individual authorized in writing to act as a parent in the absence of a parent or a guardian, or a

surrogate parent appointed to represent a student with disabilities. The term does not include the state if the child is a ward of the state and the student is eligible for special education services or is suspected of being eligible for special education services under state and federal law.

(10) "Party" means an individual, agency, institution, or organization.

(11) Until July 31, 2025, "Permanent record" means the educational record maintained by the educational agency or institution which includes:

(a) Name and address of the educational agency or institution;

(b) Full legal name of the student;

(c) Student's birth date and place of birth;

(d) Name of parents/guardians;

(e) Date of entry into the school;

(f) Name of school previously attended;

(g) Courses of study and marks received;

(h) Data documenting a student's progress toward achievement of state standards and must include a student's Oregon State Assessment results;

(i) Credits earned;

(j) Attendance;

(k) Date of withdrawal from school;

(l) Social security number, subject to subsection (1)(j) of this rule; and

(m) Such additional information as the educational agency or institution may prescribe.

(12) Beginning August 1, 2025, "permanent record" means the educational record maintained by the educational agency or institution which may include:

(a) Name and address of the educational agency or institution;

(b) Full legal name of the student;

(c) Student's birth date;

(d) Name of parents/guardians;

(e) Date of entry into the school;

(f) Name of school previously attended;

(g) Courses of study and marks received;

(h) Data documenting a student's progress toward achievement of state standards and must include a student's Oregon State Assessment results;

(i) Credits earned;

(j) Attendance; and

(k) Date of withdrawal from school.

(132) "Personally Identifiable Information" is information as defined in the Family Educational Rights and Privacy Act (FERPA) and ~~OAR 581-015-2700~~OAR 581-015-2000(24), this includes but is not limited to:

(a) The student's name;

(b) The name of the student's guardian, parent, or other family member;

(c) The address of the student or student's family;

(d) A personal identifier, such as the student's social security number or student number;

(e) A list of personal characteristics that would make the student's identity easily traceable; and

(f) Other information that would make the student's identity easily traceable.

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

(154) "Student" means any individual who is or has been in attendance at an educational agency or institution and regarding whom the agency or institution maintains education records.

(165) "Substitute care program" means family foster care, family group home care, parole foster care, family shelter care, adolescent shelter care and professional group care.

[Publications: Publications referenced are available from the agency.]

**Statutory/Other Authority:** ORS 326.565 & 34 CFR § 99.3

**Statutes/Other Implemented:** ORS 326.565

**History:**

ODE 1-2025, amend filed 01/16/2025, effective 01/17/2025

ODE 14-2018, minor correction filed 05/02/2018, effective 05/02/2018

ODE 14-2012, f. 3-30-12, cert. ef. 4-2-12

ODE 8-2007, f. & cert. ef. 3-1-07

EB 20-1995, f. & cert. ef. 7-25-95

EB 5-1994, f. & cert. ef. 4-29-94

EB 31-1993(Temp), f. 10-6-93, cert. ef. 11-6-93

**OAR 581-021-0371:**

**Conditions for Disclosure of Information to Comply with Judicial Order or Subpoena**

**(1) Under this section, unless required by a court order or a warrant authorized by a court, the educational agency or institution may not disclose, for the purpose of enforcement of federal immigration laws, the following information concerning a student, whether current or otherwise:**

**(a) The student's address;**

**(b) The student's workplace or hours of work;**

**(c) The student's school or school hours;**

**(d) The student's contact information, including telephone number, electronic mail address or social media account information;**

**(e) The identity of known associates or relatives of the student;**

**(f) The date, time or location of the student's hearings, proceedings or appointments with the educational agency or institution that are not matters of public record;**

**(g) The student's citizenship or immigration status; or**

**(e) Information described in paragraphs (a) through (g) of this subsection with respect to known relatives or associates of the student.**

**(2) The educational agency or institution may disclose information under this section only if the agency or institution must makes a reasonable effort to notify the parent or eligible student of the order or subpoena in advance of disclosure compliance, so that the parent or eligible student may seek protective action except as provided below.**

~~(1) Conditions when no notice required:~~

~~(32) The educational agency or institution may disclose information under this section without notice to the parent or eligible student under paragraph (2) is not required if the disclosure is in compliance with:~~

(a) A federal grand jury subpoena and the court has ordered that the existence or the contents of the subpoena or the information furnished in response to the subpoena not be disclosed; or

(b) Any other subpoena issued for a law enforcement purpose and the court or other issuing agency has ordered that the existence or the contents of the subpoena or the information furnished in response to the subpoena not be disclosed.

**Statutory/Other Authority:** ORS 326.565, ~~ORS 180.805,~~ & 34 CFR § 99.31

**Statutes/Other Implemented:** ORS 326.56

**History:**

ODE 8-2007, f. & cert. ef. 3-1-07



OREGON  
DEPARTMENT OF  
EDUCATION

*Oregon achieves . . . together!*

## **THE IVY SCHOOL CHARTER RENEWAL APPLICATION**

**Oregon Charter Schools Program  
State Sponsored Charter Schools**

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# CHARTER RENEWAL APPLICATION

## Instructions

The Charter Renewal Application must be submitted to the authorizer in **electronic form** by **11:59 PM** on **January 1** of the year the charter contract expires.

## Format for Submissions

- The renewal application narrative should not exceed 25 (twenty-five) pages, excluding table of contents and attachments.
- The application must include the Renewal Application Form and must be signed by both the School Leader/Director and the Board Chair/President.
- The application should include a Table of Contents that includes any attachments.
- The application should have standard one-inch margins, be clearly paginated, and use at least 11-point font.
- Any attachment should provide information that a) meaningfully augments the body of evidence that the authorizer has already collected on the school's performance, or b) illustrates or supports plans or strategies for the next charter term that would be material to the charter contract for the renewal term. Applicants should reference attachments clearly in the application.
- The application should not include any photographs, pictures, or news clips unless they are being submitted as evidence of performance for renewal criteria.
- All files should be submitted as PDFs.

## Electronic Submission

The Charter Renewal Application and all related documents should be uploaded to the *Smartsheet* line labeled "Renewal Documents" in the 2019-20 School Year.

# RENEWAL TIMELINE

<b>Renewal Stage</b>	<b>Purpose</b>	<b>Date</b>
Renewal orientation conducted with School Leaders of each school up for renewal in the coming year	Explain the elements of the renewal process and set expectations regarding requirements and timeline	August-September
Renewal application due	Provide an opportunity for schools to formally request renewal and present plans for a new charter term	January 1 of year the charter will expire
Conduct site visits or other supplemental evidence gathering	Gather supplemental evidence of school performance and compliance to inform renewal recommendation	By January 31 of the year the charter will expire
Public hearing at the charter school	Following analysis by a team of experts, sponsor staff should assemble recommendations and present to the schools and board for discussion and public comment	Within 45 days of the renewal application submission
Renewal recommendation	Following analysis by a team of experts, authorizer staff will assemble a recommendation and present to the school and board for discussion and public comment	Within 15 days of the public hearing
Charter school renewal decision	Authorizer to make decision to renew or non-renew and communicate decision to families and other stakeholders	Within 30 days of the public hearing
Contract negotiations	Establish the terms for the next charter contract and consult with charter school regarding Federal funds the school is eligible to receive and Federal programs in which the charter school may participate	Within 90 days after the date of approved renewal

# RENEWAL QUESTIONS

## I. Executive Summary

Provide the enrollment and demographic information for the current school year (Table A). Then provide a brief (one to two page) description of the school, including an overview of the mission and vision, educational program, community and local connections, and leadership and governance.

CURRENT YEAR ENROLLMENT & DEMOGRAPHIC INFORMATION	
<b>Total Enrollment</b>	
Grades Served	k-8
# of Students Enrolled	266
# of Students on Waiting List	187
<b>Gender</b>	
# Male	133
# Female	126
<b>Ethnicity/Race</b>	
# White	167
# Black	16
# Hispanic	36
# Asian	5
# Other	42
<b>Special Populations</b>	
# Students with Disabilities	78
# English Language Learners	0
# Homeless Students	0
# Eligible for Free and Reduced Lunch	CEP(69)
PROJECTED ENROLLMENT & GRADES SERVED	
<b>Total Enrollment</b>	
Projected Grades Served	K-8
Maximum Projected Enrollment	300

## II. Looking Back: The Record of Performance

Section II is the school’s opportunity to supplement or augment the performance record. Schools should use the Performance Framework and the annual reports produced by the school as a guide for this section. Responses should reference the specific criteria, expectations, and data in the Performance Framework and local assessment data used by the school.

Responses may include, but are not limited to, information about interim assessments or progress reports; evidence of performance on school- or mission-specific goals; and improvements undertaken at the school along with evidence of progress for any areas in which the school has not previously met or is not currently meeting the performance standard.

Responses should not include anecdotal information or evidence that is not relevant to the school's academic, financial, and organizational performance and the school's performance expectations as defined by the authorizer's Performance Framework and the school's charter contract.

Renewal Recommendations will be based on all evidence of school performance in the record, including but not limited to the school's responses in this section.

### **A. Academic Performance**

1. Using the results contained in the Performance Framework, explain whether or not the school has met its performance expectations.
2. Provide any academic performance-related evidence, supplemental data, or contextual information that may not be captured in authorizer records. Submissions may include supplements related to the Renewal Performance Report. Please reference the specific Performance Framework measures to which the information applies, as appropriate.
3. Provide evidence of outcomes related to any mission-specific academic goals and measures established in the charter contract.

#### **Academic Performance:**

*Our school has successfully met its performance expectations as outlined in the Performance Framework. By consistently reaching key benchmarks, we have demonstrated strong academic achievement, a positive school climate, and effective operational practices. Our results highlight a commitment to excellence and ongoing improvement, ensuring that we not only meet but strive to exceed our performance goals.*

*Additionally we assess our students three times per year using the i-Ready adaptive test, which measures growth in math and reading. These results guide teachers in planning individualized lessons tailored to each student's academic needs. Teachers also use ongoing observations and analysis of daily work to assess student learning and refine lesson plans. Additionally, our students consistently achieve competitive scores on the OSAS (Oregon Statewide Assessment System) tests, further demonstrating our commitment to academic excellence and our ability to support student growth and success.*

### **B. Financial Performance**

1. Provide evidence that the school is current in meeting its liabilities, including but not limited to payroll taxes, debt service payments, and employee benefits.
2. Provide any financial performance-related evidence, supplemental data, or contextual information that may not be captured in authorizer records. Submissions may include, but are not limited to, updated financial records and other updates. Please reference the

specific Performance Framework measures to which the information applies, as appropriate.

**1. Liabilities Compliance:**

*The Ivy school affirms that it is currently meeting all financial liabilities. This includes, but is not limited to:*

- *Timely payment of payroll taxes.*
- *Fulfillment of all debt service obligations.*
- *Full provision of employee benefits.*

*These commitments reflect our ongoing dedication to maintaining a stable financial foundation and meeting our contractual and legal obligations.*

**2. Evidence of Financial Performance:**

- *The Ivy School has maintained a record of strong financial stewardship, as evidenced by **seven consecutive years of clean audits**, demonstrating adherence to sound accounting principles and fiscal responsibility.*
- *Our quarterly financial statements further illustrate consistent and prudent management of resources. These statements confirm that we continue to operate within our means and meet the standards outlined in the Performance Framework measures.*

*This evidence underscores The Ivy Schools financial health, operational transparency, and commitment to meeting all obligations, ensuring continued trust and accountability with all stakeholders.*

### **C. Organizational Performance**

**1.** Provide any organizational performance-related evidence, supplemental data, or contextual information that may not be captured in authorizer records. Submissions may include evidence of current compliance in areas for which the school was found previously to be non-compliant or other updates relevant to the Renewal. Please reference the specific Performance Framework measures to which the information applies, as appropriate.

**2.** Provide evidence of outcomes related to any school-established organizational goals, as appropriate.

### **Response to Organizational Performance Evidence**

*Over the past several years, our organization has made remarkable progress in advancing our mission, with a particular focus on community engagement, diversity, and programmatic growth. Below is an overview of our key accomplishments, which reflect both our dedication to compliance and our steadfast commitment to achieving our goals:*

### **Community Engagement and Support**

*Community engagement remains at the heart of our mission. We have actively partnered with local organizations to foster meaningful connections and address community needs. Our collaboration with the local AME Church has supported their efforts in managing the Toys for Tots program, ensuring children in need receive holiday gifts, and participating in church clean-up initiatives. Additionally, partnerships with the Soul Restoration Center and the Portland Opportunities Industrialization Center (POIC) have created pathways for local youth, offering mentorship, job readiness programs, and opportunities to build successful futures. These collaborations reflect our dedication to uplifting the community and fostering opportunities for growth.*

### **Diversity and Staff Development**

*Our commitment to equity and inclusion has driven transformative changes within our staff. Central to these efforts is our "grow our own" model, which prioritizes creating opportunities for individuals from the communities we serve to join our workforce. Over the past seven years, we have increased the percentage of staff of color from 1% to 30%, demonstrating our deliberate effort to decenter whiteness and foster an environment that reflects the rich diversity of our students and families.*

*Through inclusive hiring practices and a focus on building a culturally responsive team, we have enhanced our ability to provide an educational experience that resonates with all students. With this work, we hope to ensure every student feels seen, valued, and supported.*

### **Programmatic Growth and Food Security Initiatives**

*Addressing food insecurity is integral to supporting our students' well-being. We are proud to have developed a comprehensive "From Scratch" lunch program that provides every student with a nutritious breakfast and hot lunch at no cost. This initiative, made possible through partnerships with the Oregon Department of Education (ODE) and strategic grant funding, ensures students can focus on their education without the distraction of hunger.*

*The program not only meets an immediate need but also reinforces our long-term commitment to removing barriers to learning and supporting the whole child.*

### **Expansion of Services for Children**

*We are equally proud of the success of our Children's House, which has been providing high-quality, non-tuition-based Montessori education for five years. In a region where access to Montessori education is often limited to private schools, this initiative ensures that all families, regardless of financial circumstances, can benefit from this transformative learning approach.*

*Starting children in a Montessori environment during their early years sets a strong foundation for success in elementary education and beyond. By preparing students to thrive in a Montessori setting from the beginning, we help them unlock their potential and build a love for learning.*

*Additionally, we have achieved a major organizational milestone by purchasing a building for our school. This acquisition provides long-term stability, enabling us to better plan for the future, manage our budget effectively, and invest in the growth and sustainability of our programs.*

*These achievements represent significant steps forward in our journey to fulfill our mission. They highlight our unwavering commitment to supporting our community, fostering equity and inclusion, and creating opportunities for every student to succeed. As we continue to grow, we remain steadfast in our dedication to serving as a cornerstone of educational excellence and a source of opportunity for all.*

### **III. Looking Forward: Plans for the Next Charter Term**

Section III is the school's opportunity to discuss plans for the next charter term. Schools should identify any anticipated changes to the school's educational program, governance model, and financial outlook and must identify any proposed changes that would require modification of a material provision in the school's charter contract or that are likely to impact the school's academic or organizational success or its financial sustainability. As a general rule, the school should identify any changes that are relevant or significant with respect to the performance outcomes that the school has agreed to meet or are otherwise relevant to the school's renewal and continued authorization and operation as a public charter school. The authorizer reserves the right to request additional information so that it may sufficiently assess the impact and planning for such changes. Even if proposed changes would occur several years into the next charter term, the authorizer strongly encourages applicants to outline them here.

**NOTE:** Consistent with ORS 338.065 and the terms of the charter contract, the authorizer will make its renewal decisions based on the school's track record of performance, and not on promises of future performance or improvement. Responses to the questions in Section III will not be the basis for the authorizer's decision for renewal or non-renewal. Any anticipated changes to the school's educational program, governance model, and financial outlook and any proposed material modifications to the school's current charter contract must be proposed below and are subject to successful contract negotiations with the authorizer consistent with authorizer policy and state law. If the school has any questions about whether particular information or a proposed change should be included, please contact the authorizer prior to submission of this application.

#### **A. Educational Program**

1. Describe any significant changes to the essential terms of the school's educational program. Essential terms are those included, either directly or by incorporation, in the school's existing charter contract that relate to its educational program, including but not limited to the school's mission, course of study, instructional program, grade levels served, and, if applicable, any mission-specific goals.

*We do not anticipate any significant changes to the essential terms of our educational program during the requested 10-year charter term. Our school remains firmly committed to its mission of providing a high-quality, equitable Montessori education that fosters academic, social, and emotional growth for all students.*

*We will continue to serve the current grade levels outlined in our charter contract and maintain the integrity of our Montessori instructional program, which includes a focus on individualized learning, hands-on materials, and fostering independence. Additionally, our*

*course of study will remain aligned with Montessori principles and aligned with state standards to ensure our students meet or exceed academic expectations.*

*Furthermore, we are committed to pursuing our mission-specific goals, such as promoting equity and increasing access to Montessori education for underserved populations. These goals remain central to our vision and guide our decision-making processes.*

*By requesting a 10-year term, we seek to solidify our foundation and build upon the successes of our existing program without altering its core components. This stability will enable us to deepen our impact and continue providing a Montessori educational experience for our students.*

## **B. Financial Plans**

1. Provide a five-year projected budget for the next charter term. The budget narrative should make clear the assumptions on which the school bases its key revenue and expenditure projections. In addition, the budget and narrative should describe any anticipated changes to the school's financial position and clearly articulate the financial impact of any proposed modifications on other aspects of the school's education program and operations (e.g., new curriculum or instructional materials, modified staffing structure, decreased or increased enrollment, etc.).

*The Ivy School is committed to maintaining financial stability and meeting all fiscal obligations, including payroll taxes, debt service payments, and employee benefits. Our 2026-30 five-year budget projection reflects a well-structured financial plan based on current enrollment of 280 state-funded students and accounts for annual growth in state funding, controlled operational expenses, and projected revenue increases. With a robust strategy to maintain a surplus each year and cash reserves covering 3-4 months of operational needs, The Ivy School demonstrates its ability to sustain financial health and fulfill its liabilities, ensuring continued support for our mission and community.*

[5 year budget projection](#)

[5 year budget notes](#)

## **C. Organizational Plans**

1. Describe any anticipated changes to the governance of the school, including but not limited to board composition, committee structure, and/or amendments to by-laws.

***We do not anticipate any changes to the Ivy Schools governance.***

2. Describe any anticipated changes to the school leadership or staffing model and any proposed changes to the management of the school, including any changes to the school's relationship with a third-party education service provider, if one exists. If the school does not currently contract with an Education Service Provider (ESP) but intends to do so during the next charter term, if the school currently contracts with an ESP but does not intend to continue to do so during the next term, or if the school intends to make material modifications to its existing management agreement, the school must

contact the authorizer for additional information prior to the submission of this application.

***We do not anticipate any changes to the Ivy Schools leadership, staffing models or management of the school.***

**3.** Describe the current status of the school facility and discuss any anticipated changes in facilities needs or location. *Ensure that the budget narrative in section B explains how the school's facilities plans are reflected in the budget.*

***We do not anticipate any changes to the Ivy Schools facilities.***

# RENEWAL APPLICATION SIGNATURES

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

Charter School Director/Administrator

*Nikki Jones*

Date

*12/31/24*

Charter School Board Chairperson/President

*Jim Livermore*

Date

*02/11/2025*

## **The Ivy School**

### **2026-30 5-year Budget Projection Notes – 280 State-Funded Students submitted by Dave Coffman, October 30, 2024**

#### **General Budget Notes**

**Enrollment** – Budget is based on current enrollment of 280 students. This is currently below our Charter enrollment cap of 350 State-Funded students. We plan to continue our Children’s House/Preschool program, which brings in between 3 and 10 tuition-based students.

The Ivy School’s current building has a capacity for over 400 students, so we will be well under our capacity from a facilities perspective.

Staffing will continue at the same level as in the 2024-25 School Year.

#### **Revenue Budget**

**Activity Fees** – Activity Fees are budgeted based on projected enrollment.

**Facility Rental** – We are budgeting rental fees based on current arrangements and building capacity.

**Children’s House Tuition** – We are currently planning to have 3-4 tuition-based Children’s House students.

**Portland Arts Tax Income** – Arts Tax revenue is expected to grow as wages grow.

**Fundraising Income** – We are budgeting an increase to our fundraising capacity over the next 5 years.

**School Lunch Revenue** – School Lunch Revenue is budgeted based on projected enrollment.

**State Funding** – We are currently projecting the per student funding rate to increase by about 3% each year based on historical experience.

We are projecting State Funded enrollment of 280 students, which matches our current enrollment.

#### **Expense Budget**

**Instructional Wages/Benefits** – Includes the following:

- Pay increases are projected at 3% each year of the 5-year term.
- Staffing will remain at current levels
- Taxes, Benefits & PERS are budgeted to increase as wages increase

**Instructional Purchased Services & Supplies** – Purchased Services & Supplies are budgeted to include annual inflationary increases.

**Support Services Wages/Benefits** – Includes the following:

- Pay increases are projected between 2%-4% each year of the 5-year term.
- Staffing will remain at current levels
- Taxes, Benefits & PERS are budgeted to increase as wages increase

**Support Services Purchased Services & Supplies** – Budgeted Purchased Services & Supplies reflect current operations with the addition of annual inflationary increases.

**Operations / Maintenance** – Budgeted Operations/Maintenance reflect current operations with the addition of annual inflationary increases.

**Other Activities** – Budgeted Other Activities include Fundraising Expenses and Bad Debt and reflect current operations with the addition of annual inflationary increases.

**Capital Outlay** – Funds budgeted in Capital Outlay are intended to fund maintenance/improvement projects on the building.

**Debt Service** – This category represents our principal and interest obligations on our building loan. Our current loan term is fixed through February 2031.

**Net Ordinary Income** – We are projecting a minimal surplus in each year of the 5-yr projection. We have been able to replenish our cash reserves over the last 5 years after purchasing the building in 2019 and plan to be able to maintain cash reserves of 3 to 4 months of operational spending needs.

The Ivy School 5-Year Budget Projection July 2025 through June 2030

AQA/PP/MS

	FY 2025-26	FY 2026-27	FY 2027-28	FY 2028-29	FY 2029-30	Notes
	Budget	Budget	Budget	Budget	Budget	
Charter Enrollment	280	280	280	280	280	Based on Current Enrollment
Tuition Based Enrollment	3	3	3	3	3	Childrens' House Program
	<u>283</u>	<u>283</u>	<u>283</u>	<u>283</u>	<u>283</u>	
<b>Ordinary Income/Expense</b>						
<b>Income</b>						
<b>4100 · LOCAL INCOME</b>						
4110 · Activity Fees	50,000	50,000	50,000	50,000	50,000	
4125 · Facility Rental	10,000	10,000	10,000	10,300	10,609	
4138 · Childrens House Tuition	44,000	44,000	45,320	45,320	46,680	
Less Childrens House Scholarships	(11,000)	(11,000)	(11,330)	(11,330)	(11,670)	Equivalent of 1 full tuition scholarship
4140 · Portland Arts Tax	33,000	33,990	35,010	36,060	37,142	Inflationary increase, based on wages & enrollment
4180 · Fundraising Income	35,000	40,000	45,000	50,000	55,000	
<b>Total 4100 · LOCAL INCOME</b>	<u>161,000</u>	<u>166,990</u>	<u>174,000</u>	<u>180,350</u>	<u>187,761</u>	
4200 · School Lunch Program	130,000	132,600	135,252	137,957	140,716	
<b>4300 · STATE INCOME</b>						
4310 · State Grants	45,000	45,000	45,000	45,000	45,000	
4320 · Outdoor School Funding	70,000	72,000	72,000	74,000	74,000	
4330 · SIA Funding	203,940	210,058	216,360	222,851	229,537	Projecting 3% funding rate increases
4350 · State School Fund	2,796,500	2,880,395	2,966,807	3,055,811	3,147,485	Projecting 3% funding rate increases
<b>4300 · State Income</b>	<u>3,115,440</u>	<u>3,207,453</u>	<u>3,300,167</u>	<u>3,397,662</u>	<u>3,496,022</u>	
4999 · Interest Income	13,000	13,200	13,400	13,600	13,800	
<b>Total Income</b>	<u>3,419,440</u>	<u>3,520,243</u>	<u>3,622,819</u>	<u>3,729,569</u>	<u>3,838,299</u>	
<b>Gross Profit</b>	<u>3,419,440</u>	<u>3,520,243</u>	<u>3,622,819</u>	<u>3,729,569</u>	<u>3,838,299</u>	
<b>Expense</b>						
<b>5000 · INSTRUCTION</b>						
5100 · Wages	1,226,500	1,263,295	1,301,194	1,340,230	1,380,437	Inflationary Increases, no change to FTE
5200 · Employee Taxes & Benefits	600,985	619,015	637,585	656,713	676,414	insurance benefit & PERS Increases
5300 · Purchased Services	170,000	175,100	180,353	185,764	191,337	inflationary increases
5400 · Supplies & Materials	50,000	51,500	53,045	54,636	56,275	inflationary increases
<b>Total 5000 · INSTRUCTION</b>	<u>2,047,485</u>	<u>2,108,910</u>	<u>2,172,177</u>	<u>2,237,343</u>	<u>2,304,463</u>	
<b>6000 · SUPPORT SERVICES</b>						
6100 · Wages	485,000	499,550	514,537	529,973	545,872	Inflationary Increases, no change to FTE
6200 · Employee Taxes & Benefits	232,800	239,784	246,978	254,387	262,019	insurance benefit & PERS Increases
6300 · Purchased Services	135,000	139,050	143,222	147,519	151,945	inflationary increases
6400 · Supplies & Materials	75,000	77,250	79,568	81,955	84,414	inflationary increases
6500 · Operations / Maintenance	190,000	195,700	201,571	207,618	213,847	inflationary increases
<b>Total 6000 · SUPPORT SERVICES</b>	<u>1,117,800</u>	<u>1,151,334</u>	<u>1,185,876</u>	<u>1,221,452</u>	<u>1,258,097</u>	
7000 · OTHER ACTIVITIES	500	1,000	1,500	1,750	2,000	Fundraising Expense, Bad Debt
8000 · CAPITAL OUTLAY	35,000	40,000	45,000	50,000	55,000	Building improvements & maintenance projects
9000 · DEBT SERVICE	216,480	216,480	216,480	216,480	216,480	Based on Debt-Service Schedule
<b>Total Expense</b>	<u>3,417,265</u>	<u>3,517,724</u>	<u>3,621,033</u>	<u>3,727,025</u>	<u>3,836,040</u>	
<b>Net Ordinary Income</b>	<u>2,175</u>	<u>2,519</u>	<u>1,786</u>	<u>2,544</u>	<u>2,259</u>	

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

**The Ivy School  
2023-24**



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

**Prepared by Christen Kelly  
Charter School Specialist  
Oregon Department of Education**

## **Introduction**

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

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

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

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

Christen Kelly  
Charter School Specialist  
SCORE Team  
Oregon Department of Education

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

## **Academic performance: data elements and sources**

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

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

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

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

# Academic Performance

## 1. Oregon School Rating System

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

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

**Measure 1c**

How are **Students Experiencing Poverty** achieving on state assessments in ELA compared to the **Students Experiencing Poverty** in the district?

**Exceeds standard:**

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

**Meets standard:**

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

**Does not meet standard:**

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

**Falls far below standard:**

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

State Board of Education comments: Ivy's score was 34.4 and PPS score was 23.8

School comments:

**Measure 1d**

How are **Students Experiencing Poverty** achieving on state assessments in MATH compared to the **Students Experiencing Poverty** in the district?

**Exceeds standard:**

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

**Meets standard:**

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

**Does not meet standard:**

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

**Falls far below standard:**

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

State Board of Education comments: Ivy's score was 21.9 and PPS score was 17.4

School comments:

**Measure 1e**

How are **English Learners** achieving on state assessments in ELA compared to the **English Learners** in the district?

**Exceeds standard:**

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

**Meets standard:**

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

**Does not meet standard:**

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

**Falls far below standard:**

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

State Board of Education comments: No students met these criteria for 2023-24

School comments:

**Measure 1f**

How are **English Learners** achieving on state assessments in MATH compared to the **English Learners** in the district?

**Exceeds standard:**

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

**Meets standard:**

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

**Does not meet standard:**

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

**Falls far below standard:**

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

State Board of Education comments: No students met these criteria for 2023-24

School comments:

**Measure 1g**

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

**Exceeds standard:**

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

**Meets standard:**

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

**Does not meet standard:**

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

**Falls far below standard:**

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

State Board of Education comments: Ivy's score was 41.9 and PPS score was 33.2

School comments:

**Measure 1h**

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

**Exceeds standard:**

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

**Meets standard:**

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

**Does not meet standard:**

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

**Falls far below standard:**

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

State Board of Education comments: Ivy's score was 37.2 and PPS score was 29.9

School comments:

**Measure 1i**

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

**Exceeds standard:**

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

**Meets standard:**

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

**Does not meet standard:**

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

**Falls far below standard:**

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

State Board of Education comments: Ivy's score was 41.7 and PPS score was 27.4

School comments:

**Measure 1j**

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

**Exceeds standard:**

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

**Meets standard:**

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

**Does not meet standard:**

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

**Falls far below standard:**

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

State Board of Education comments: Ivy's score was 11.4 and PPS score was 20.7

School comments: At Ivy School, we recognize the importance of equitable academic achievement for students of underserved races and ethnicities and are committed to closing achievement gaps in mathematics. While our current state assessment scores are below the district average, we believe that standardized tests do not fully capture the depth of student learning in our Montessori environment, where hands-on, manipulative-based learning builds strong conceptual understanding over time.

Our instructional approach provides personalized, developmentally appropriate learning experiences, allowing students to engage with concrete materials before transitioning to abstract mathematical concepts. We monitor progress throughout the year using i-Ready assessments, which give real-time data on student growth and inform instructional adjustments. These assessments consistently show

that our students of color are making measurable progress in math.

Additionally, we are strengthening intervention strategies by:

- Increasing targeted small-group instruction to provide additional support in key math concepts.
- Expanding cross-age mentorship opportunities, allowing older students to reinforce their understanding by teaching younger peers.
- Utilizing data-driven instruction to ensure students receive the individualized support they need to succeed.

While our current achievement rates indicate room for growth, we remain committed to refining our approach, leveraging our Montessori methods, and ensuring that all students—particularly those from underserved backgrounds—receive the support they need to excel in mathematics

## 2. Student Academic Growth

<b>Measure 2a</b> Are All students making expected annual academic growth in ELA compared to their peers? (3-year Average Combined Median Growth Percentile-CMGP)
<b>Exceeds standard:</b> <input checked="" type="checkbox"/> Combined median growth percentile of 60 or more.
<b>Meets standard:</b> <input type="checkbox"/> Combined median growth percentile of between 35 and 59.5.
<b>Does not meet standard:</b> <input type="checkbox"/> Combined median growth percentile of between 30 and 34.5.
<b>Falls far below standard:</b> <input type="checkbox"/> Combined median growth percentile of lower than 30.
State Board of Education comments: Ivy's 3-year average for ELA is 60.7. The state classifies this average as a Level 3. The state also calculated the average gap score change between 2018-19 and 2023-24. The change in average for this measure is 3, which is classified as level 4.
School comments:

<b>Measure 2b</b> Are students making expected annual academic growth in MATH compared to their peers? (3-year Average Combined Median Growth Percentile)
<b>Exceeds standard:</b> <input type="checkbox"/> Combined median growth percentile of 60 or more.
<b>Meets standard:</b> <input checked="" type="checkbox"/> Combined median growth percentile of between 35 and 59.5.
<b>Does not meet standard:</b> <input type="checkbox"/> Combined median growth percentile of between 30 and 34.5.
<b>Falls far below standard:</b> <input type="checkbox"/> Combined median growth percentile of lower than 30.
State Board of Education comments: Ivy's 3-year average for Math is 37.0. The state classifies this average as a Level 2. The state also calculated the average gap score change between 2018-19 and 2023-24. The change in average for this measure is 4, which is classified as level 5, indicating an improvement in scores.
School comments:

### 3. Subgroup Growth

#### Measure 3a

Is the school increasing academic performance in ELA over time for **Students Experiencing Poverty** students? (3-year Average Combined Median Growth Percentile)

#### **Exceeds standard:**

Combined median growth percentile of 60 or more.

#### **Meets standard:**

Combined median growth percentile of between 35 and 59.5.

#### **Does not meet standard:**

Combined median growth percentile of between 30 and 34.5.

#### **Falls far below standard:**

Combined median growth percentile of lower than 30.

State Board of Education comments: Ivy's 3-year average for ELA is 38.5. The state classifies this average as a Level 2. The state also calculated the average gap score change between 2018-19 and 2023-24. The change in average for this measure is -17 and is classified as unrated due to the low number of students in this category that were measured.

School comments:

**Measure 3b**

Is the school increasing academic performance in MATH over time for Students Experiencing Poverty? (3-year Average Combined Median Growth Percentile)

*Exceeds standard:*

Combined median growth percentile of 60 or more.

*Meets standard:*

Combined median growth percentile of between 35 and 59.5.

*Does not meet standard:*

Combined median growth percentile of between 30 and 34.5.

*Falls far below standard:*

Combined median growth percentile of lower than 30.

State Board of Education comments: Ivy's 3-year average for Math is 22.0. The state classifies this average as a Level 2. The state also calculated the average gap score change between 2018-19 and 2023-24. The change in average for this measure is -32, and is classified as unrated due to the low number of students in this category that were measured.

School comments: At the Ivy School, we utilize i-Ready testing to assess and level students in mathematics, allowing us to determine their current skill levels and instructional needs. Unlike the state end-of-year assessment, which provides a summative snapshot, i-Ready offers real-time, adaptive insights into student progress throughout the year. These results enable our educators to make data-driven decisions, tailoring instruction to meet individual student needs and ensuring targeted support for both remediation and enrichment. By leveraging i-Ready, we can track growth over time, adjust instructional strategies proactively, and provide students with the resources they need to succeed.

We also recognize that nutrition and food security play a crucial role in students' academic success and social-emotional well-being. This year, Ivy School launched a Free Lunch for All program, providing nutritious, from-scratch meals to all students, along with a free breakfast daily. By ensuring that every child has access to healthy, nourishing meals, we aim to remove barriers to learning and support overall student success.

In addition, we are partnering with Portland Public Schools' McKinney-Vento program to provide additional resources and support for students experiencing homelessness. This collaboration ensures that students facing housing insecurity have access to academic, emotional, and basic needs support, helping them stay engaged and successful in school.

While our current achievement rates indicate room for growth, we remain committed to refining our approach, leveraging our Montessori methods, and ensuring that all students—particularly those from Experiencing Poverty—receive the support they need to thrive academically, socially, and emotionally.

**Measure 3c**

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

**Exceeds standard:**

Combined median growth percentile of 60 or more.

**Meets standard:**

Combined median growth percentile of between 35 and 59.5.

**Does not meet standard:**

Combined median growth percentile of between 30 and 34.5.

**Falls far below standard:**

Combined median growth percentile of lower than 30.

State Board of Education comments: No students met these criteria for 2023-24

School comments:

**Measure 3d**

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

**Exceeds standard:**

Combined median growth percentile of 60 or more.

**Meets standard:**

Combined median growth percentile of between 35 and 59.5.

**Does not meet standard:**

Combined median growth percentile of between 30 and 34.5.

**Falls far below standard:**

Combined median growth percentile of lower than 30.

State Board of Education comments: No students met these criteria for 2023-24

School comments:

**Measure 3e**

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

**Exceeds standard:**

Combined median growth percentile of 60 or more.

**Meets standard:**

Combined median growth percentile of between 35 and 59.5.

**Does not meet standard:**

Combined median growth percentile of between 30 and 34.5.

**Falls far below standard:**

Combined median growth percentile of lower than 30.

State Board of Education comments: Ivy's 3-year average for ELA is 43.1. The state classifies this average as a Level 2. The state also calculated the average gap score change between 2018-19 and 2023-24. The change in average for this measure is 3, which the state classifies as Level 4.

School comments:

**Measure 3f**

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

**Exceeds standard:**

Combined median growth percentile of 60 or more.

**Meets standard:**

Combined median growth percentile of between 35 and 59.5.

**Does not meet standard:**

Combined median growth percentile of between 30 and 34.5.

**Falls far below standard:**

Combined median growth percentile of lower than 30.

State Board of Education comments: Ivy's 3-year average for Math is 33.6. The state classifies this average as a Level 2. The state also calculated the average gap score change between 2018-19 and 2023-24. The change in average for this measure is 50, which is classified as Level 5, indicating an improvement in scores.

School comments: At The Ivy School, we are dedicated to supporting all students, including those with disabilities, through individualized and hands-on learning experiences. Our Montessori approach provides students with opportunities to engage in concrete, manipulative-based learning, which helps build foundational math skills in a way that meets diverse learning needs. Students work with specialized materials such as golden beads, fraction insets, and the checkerboard for multiplication, allowing them to develop a deep conceptual understanding of mathematical principles at their own pace.

To ensure that students who may require additional support are identified early, we work closely with teachers through the Child Find process. This allows us to assess and determine if students need further evaluation for special education services. Additionally, we collaborate with Portland Public Schools (PPS) to provide targeted academic interventions, therapy services, and other supportive

measures for students with disabilities.

While Ivy's three-year average for math places us at Level 2, we are encouraged by the significant improvement in our average gap score change, which has reached Level 5. This reflects the effectiveness of our individualized instruction, small-group interventions, and collaboration with specialists in supporting students with disabilities. We remain committed to enhancing math instruction, refining intervention strategies, and advocating for additional resources to further improve student outcomes over time.

**Measure 3g**

Is the school increasing academic performance in ELA over time for students of **Underserved Races/Ethnicities**? (3-year Average Combined Median Growth Percentile)

**Exceeds standard:**

Combined median growth percentile of 60 or more.

**Meets standard:**

Combined median growth percentile of between 35 and 59.5.

**Does not meet standard:**

Combined median growth percentile of between 30 and 34.5.

**Falls far below standard:**

Combined median growth percentile of lower than 30.

State Board of Education comments: Ivy's 3-year average for ELA is 40.2. The state classifies this average as a Level 2. The state also calculated the average gap score change between 2018-19 and 2023-24. The change in average for this measure is -36, which the state classifies as Level 2.

School comments:

**Measure 3h**

Is the school increasing academic performance in MATH over time for students of **Underserved Races/Ethnicities**? (3-year Average Combined Median Growth Percentile)

**Exceeds standard:**

Combined median growth percentile of 60 or more.

**Meets standard:**

Combined median growth percentile of between 35 and 59.5.

**Does not meet standard:**

Combined median growth percentile of between 30 and 34.5.

**Falls far below standard:**

Combined median growth percentile of lower than 30.

State Board of Education comments: Ivy's 3-year average for Math is 17.8. The state classifies this average as a Level 2. The state also calculated the average gap score change between 2018-19 and 2023-24. The change in average for this measure is -30, which the state classifies as Level 2.

School comments: At The Ivy School, we are committed to closing the achievement gap and improving academic outcomes for students of underserved races and ethnicities. To support this goal, we track student progress in mathematics three times per year using i-Ready assessments. These assessments allow us to identify learning gaps early, adjust instruction accordingly, and provide targeted interventions to support student growth.

Our Montessori approach emphasizes hands-on, concrete learning experiences, which foster deep conceptual understanding rather than rote memorization. Students engage with manipulatives, real-world problem-solving, and exploratory learning, which are essential for building strong mathematical foundations but can be difficult to measure using traditional standardized tests. For example, students work with golden beads, fraction insets, and algebraic materials to develop number sense, spatial reasoning, and problem-solving skills that go beyond multiple-choice assessments.

Despite these challenges, our internal i-Ready data consistently shows growth among our students of color. By utilizing data-driven instructional strategies, we ensure that students receive individualized support, small-group instruction, and targeted interventions that align with their developmental needs. Moving forward, we remain focused on implementing evidence-based interventions and Montessori-aligned assessments to capture a more accurate picture of student learning and progress.

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

<b>Measure 4a</b> Is the school aligning curriculum to Common Core State Standards?
<b>Meets standard:</b> <input checked="" type="checkbox"/> School is offering all required core subjects and has aligned all classes in core subjects to Common Core State Standards and has articulated this through detailed syllabi, course descriptions, curriculum alignments, or other methods.
<b>Does not meet standard:</b> <input type="checkbox"/> School is offering all required core subjects but has not fully aligned all classes in core subjects to Common Core State Standards, and/or has not provided evidence of this through detailed syllabi, course descriptions, curriculum alignments, or other methods.
<b>Falls far below standard:</b> <input type="checkbox"/> School is not offering all required core subjects and/or has not aligned all classes in core subjects to Common Core State Standards and has not provided evidence of this through detailed syllabi, course descriptions, curriculum alignments, or other methods.
State Board of Education comments: The Ivy School is faithful to the Montessori curriculum and follows a curriculum to CCSS alignment rubric.
School comments:

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

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

**Measure 5b**

What percentage of students is graduating within four years of entering high school as compared to their peers in like schools?

**Exceeds standard:**

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

**Meets standard:**

School's average graduation rate meets or exceeds the average graduation rate of their peers in like schools by up to 10%.

**Does not meet standard:**

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

**Falls far below standard:**

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

State Board of Education comments: N/A

School comments:

**Measure 5c**

What percentages of students receive a regular, modified, extended, or adult high school diploma or complete a GED within five years of entering high school as compared to other schools in the district?

**Exceeds standard:**

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

**Meets standard:**

School's average completion rate meets or exceeds the average district completion rate by up to 10%.

**Does not meet standard:**

School's average completion rate is less than the average district completion rate by 1-10%.

**Falls far below standard:**

School's average completion rate is less than the average district completion rate by 10% or more.

State Board of Education comments: N/A

School comments:

**Measure 5d**

What percentages of students receive a regular, modified, extended, or adult high school diploma or complete a GED within five years of entering high school as compared to their peers in like schools?

**Exceeds standard:**

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

**Meets standard:**

School's average completion rate meets or exceeds the average completion rate of their peers in like schools by up to 10%.

**Does not meet standard:**

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

**Falls far below standard:**

School's average completion rate is less than the average completion rate of their peers in like schools by 10% or more.

State Board of Education comments: N/A

School comments:

**Measure 5e**

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

**Exceeds standard:**

School's average dropout rate is less than the average district dropout rate by 4% or more.

**Meets standard:**

School's average dropout rate meets or is less than the average district dropout rate by up to 4%.

**Does not meet standard:**

School's average dropout rate exceeds the average district dropout rate by 1-4%.

**Falls far below standard:**

School's average dropout rate exceeds the average district dropout rate by 4% or more.

State Board of Education comments: N/A

School comments:

**Measure 5f**

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

**Exceeds standard:**

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

**Meets standard:**

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

**Does not meet standard:**

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

**Falls far below standard:**

School's average dropout rate exceeds the average dropout rate of their peers in like schools by 4% or more.

State Board of Education comments: N/A

School comments:

## COMMENDATIONS: ACADEMIC PERFORMANCE

- The Ivy School continues to make gains following the COVID-19 pandemic.
- Overall, the school's academics exceed the performance of PPS.
- Ivy meets or exceeds in all ELA categories.
- The school does have a strong tiered intervention system with child studies that should continue to be strengthened through evaluation, reflection, professional learning, and teacher collaboration.

## RECOMMENDATIONS: ACADEMIC PERFORMANCE

- Take actions to elevate and bolster Math achievement for students, especially for the identified student groups.
- Continue to use iReady assessments to identify areas of improvement to deliver targeted instruction.
- Consider evaluating core instructional programs and materials to ensure equitable accessibility for student groups.

## **Financial Performance: data elements and sources**

The purpose of the Financial Performance section of the Annual Report is to evaluate whether or not the charter school is financially viable.

Many of the indicators, performance targets, and ratings for this section are adopted from the National Association of Charter School Authorizers' "Core Performance Framework and Guidance".

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

- The charter school's contract
- The charter school's audited balance sheet and notes for the last three years
- The charter school's projected enrollment and actual enrollment
- The charter school's board-adopted budget
- The charter school's audited income statement and audited cash flow statement
- Annual principal and interest obligations
- Quarterly financial statements, including budget-to-actuals, profit and loss, balance sheet

# Financial Performance

## 7. Near-Term Measures

<b>Measure 7a</b> Current ratio: Current assets divided by current liabilities.
<b>Meets standard:</b> <input checked="" type="checkbox"/> Current ratio is greater than or equal to 1.1.
<b>Does not meet standard:</b> <input type="checkbox"/> Current ratio is between .9 and 1.0 or equals 1.0.
<b>Falls far below standard:</b> <input type="checkbox"/> Current ratio is less than or equal to .9.
State Board of Education comments: Ivy's ratio for 2023-24 is 3.05
School comments:

<b>Measure 7b</b> Unrestricted days cash: Unrestricted cash divided by (total expenses minus depreciation expense/365).
<b>Meets standard:</b> <input checked="" type="checkbox"/> 60 days cash
<b>Does not meet standard:</b> <input type="checkbox"/> Days cash is between 15 and 30 days
<b>Falls far below standard:</b> <input type="checkbox"/> Fewer than 15 days cash
State Board of Education comments: Ivy's unrestricted day's cash or 2023-24 is 120 days.
School comments:

<b>Measure 7c</b> Enrollment variance: actual enrollment divided by enrollment projection in charter school board-approved budget.
<b>Meets standard:</b> <input type="checkbox"/> Enrollment variance equals or exceeds 95% in the most recent year.
<b>Does not meet standard:</b> <input type="checkbox"/> Enrollment variance is between 85-95% in the most recent year.
<b>Falls far below standard:</b> <input type="checkbox"/> Enrollment variance is less than 85% in the most recent year.
State Board of Education comments: N/A. Not reported or evaluated in 2023-24.
School comments:

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

## 8. Sustainability Measures

<b>Measure 8a &amp; 8b</b> Total Margin: Net income divided by total revenue. Aggregated total margin: Total 3-year net income divided by total 3-year revenues.
<b>Meets standard:</b> <input checked="" type="checkbox"/> Aggregated 3-year total margin is positive and the most recent year total margin is positive.
<b>Does not meet standard:</b> <input type="checkbox"/> Aggregated 3-year total margin is greater than -1.5%, but trend does not “meet standard” (above).
<b>Falls far below standard:</b> <input type="checkbox"/> Aggregated three-year total margin is less than or equal to -1.5% and the most recent year total margin is less than -10%.
State Board of Education comments: Ivy’s aggregated 3 year total margin is positive and the total margin for 2023-24 is positive 2%.
School comments:

<b>Measure 8c</b> Debt to asset ratio: Total liabilities divided by total assets.
<b>Meets standard:</b> <input checked="" type="checkbox"/> Debt-to-asset ratio is less than .9.
<b>Does not meet standard:</b> <input type="checkbox"/> Debt-to-asset ratio is between .9 and 1.0.
<b>Falls far below standard:</b> <input type="checkbox"/> Debt-to-asset ratio is greater than 1.0.
State Board of Education comments: Ivy’s debt to asset ratio for 2023-24 is 0.56
School comments:

**Measure 8d & 8e**

Cash flow:

Multi-year cash flow = Year 3 total cash - Year 1 total cash.

One-year cash flow: Year 2 total cash - Year 1 total cash.

**Meets standard:**

Multi-year cumulative cash flow is positive and cash flow is positive each year.

**Does not meet standard:**

Multi-year cumulative cash flow is positive, but trend does not “meet standard” (above).

**Falls far below standard:**

Multi-year cumulative cash flow is negative.

State Board of Education comments: Ivy’s multi year cash flow has been consistently positive.

School comments:

**Measure 8f**

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

**Meets standard:**

Debt service coverage ratio is equal to or exceeds 1.1.

**Does not meet standard:**

Debt service coverage ratio is less than 1.1.

State Board of Education comments: N/A. Not reported or evaluated in 2023-24.

School comments:

**Measure 8g**

Is the school meeting financial reporting and compliance requirements?

**Meets standard:**

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

- Complete and timely submission of financial reports, including: annual budget, revised budgets (when applicable), quarterly financial reports, and annual municipal audit.
- All other reporting requirements related to the use of public funds.

**Does not meet standard:**

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

- Complete and timely submission of financial reports, including: annual budget, revised budgets (when applicable), quarterly financial reports, and annual municipal audit.
- All other reporting requirements related to the use of public funds.

State Board of Education comments: All required reports were either submitted on time or with an approved extension.

School comments:

**Measure 8h**

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

**Meets standard:**

The school materially complies with applicable laws, rules, regulations, and provisions of the charter contract relating to financial management and oversight expectations by an annual independent audit, including, but not limited to:

- An unqualified audit opinion
- An audit devoid of significant findings and conditions, material weaknesses, or significant internal control weaknesses
- An audit that does not include a going concern disclosure in the notes or an explanatory paragraph within the audit report

**Does not meet standard:**

The school was materially out of compliance with applicable laws, rules, regulations, and/or provisions of the charter contract relating to financial management and oversight expectations by an annual independent audit, including, but not limited to:

- An qualified audit opinion
- An audit containing significant findings or conditions, material weaknesses, or significant internal control weaknesses
- An audit that included a going concern disclosure in the notes or an explanatory paragraph within the audit report

State Board of Education comments: Ivy's annual audits meet all of the criteria.

School comments:

## COMMENDATIONS: FINANCIAL PERFORMANCE

1. The School showed an increase in its financial position during the year ended June 30, 2024 with a clean audit.

## RECOMMENDATIONS: FINANCIAL PERFORMANCE

1. Decreased asset to liability ratio from previous years, but still meets standard.

## **Organizational Performance: data elements and sources**

The purpose of the Organizational Performance section of the Annual Evaluation is to evaluate whether or not the charter school as an organization is effectively governed and well run.

Many of the indicators, performance targets, and ratings for this section are adopted from the National Association of Charter School Authorizers' "Core Performance Framework and Guidance".

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

- Site visit observations (both formal and informal)
- The charter school's contract
- Required reporting by the charter school, including all deliverables
- The school's adherence to deliverable and reporting due dates
- Feedback from parents, students, charter school staff, and other community stakeholders
- Student accounting reports
- The charter school's internal accountability systems
- Student enrollment forms
- The charter school's adopted board policies
- The charter school's parent/student/staff handbooks
- TSPC
- Assurances by the charter school and governing board that it is compliant with all applicable requirements

## Organizational Performance

### 10. Education Program

#### Measure 10a

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

#### *Meets standard:*

The school implemented the material terms of the education program in all material aspects and the education program in operation reflects the material terms as defined in the charter contract, or the school has gained approval for a modification to the material terms.

#### *Does not meet standard:*

The school failed to implement the material terms of the education program in all material aspects and the education program in operation does not reflect the material terms as defined in the charter contract, or the schools implemented a modification to the material terms without approval and/or a mutually agreeable amendment to the contract.

State Board of Education comments: The Ivy School is demonstrating integrity with all elements of the education program as spelled out in its charter. The focus of The Ivy School is Montessori, and all evidence supports that this educational philosophy is the focal point of the school's curriculum, staffing, budget and schedule.

School comments:

#### Measure 10b

Is the school complying with applicable education requirements?

#### *Meets standard:*

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

- Instructional days and/or minutes requirements
- Graduation and promotion requirements
- Content standards, including Common Core State Standards
- The administration of state assessments
- Implementation of mandated programming as a result of state or federal funding

#### *Does not meet standard:*

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

- Instructional days and/or minutes requirements
- Graduation and promotion requirements
- Content standards, including Common Core State Standards
- The administration of state assessments
- Implementation of mandated programming as a result of state or federal funding

State Board of Education comments: The Ivy School has complied with all applicable education requirements. The Ivy School is faithful to the Montessori curriculum and is working on a more explicit alignment of this curriculum to the Common Core State Standards. The school is managing its calendar and program options to ensure compliance with instructional time requirements. Ongoing curriculum evaluation and alignment to CCSS.

School comments:

**Measure 10c**

Is the school protecting the rights of students with disabilities?

**Meets standard:**

Consistent with the school's status as a school in a district LEA, the school materially complies with applicable laws, rules, regulations, and provisions of the charter contract (including the Individuals with Disabilities Education Act, Section 504 of the Rehabilitation Act of 1973, and the Americans with Disabilities Act) relating to the treatment of students with identified disabilities and those suspected of having a disability, including, but not limited to:

- Equitable access and opportunity to enroll
- Identification and referral
- Appropriate involvement with development and implementation of Individualized Education Plans, and appropriate development of Section 504 plans
- Operational compliance, including appropriate inclusion in the school's academic program, assessments, and extracurricular activities.
- Discipline, including due process protections, manifestation determinations, and behavioral intervention plans
- Access to the school's facility and program to students in a lawful manner and consistent with students' IEPs or 504 plans

**Does not meet standard:**

Consistent with the school's status as a school in a district LEA, the school was materially out of compliance with one or more applicable laws, rules, regulations, and provisions of the charter contract (including the Individuals with Disabilities Education Act, Section 504 of the Rehabilitation Act of 1973, and the Americans with Disabilities Act) relating to the treatment of students with identified disabilities and those suspected of having a disability, including, but not limited to:

- Equitable access and opportunity to enroll
- Identification and referral
- Appropriate involvement with development and implementation of Individualized Education Plans, and appropriate development of Section 504 plans
- Operational compliance, including appropriate inclusion in the school's academic program, assessments, and extracurricular activities.
- Discipline, including due process protections, manifestation determinations, and behavioral intervention plans
- Access to the school's facility and program to students in a lawful manner and consistent with students' IEPs or 504 plans

State Board of Education comments: The Special Education students are served by PPS staff. The Ivy School's curriculum, dedicated staff and school philosophy are additional ways in which Students with Disabilities are served. The school handbook, board policies, staff handbook, schedule and facility are all in compliance with all applicable laws, rules, regulations and provisions of the charter contract. No complaints for SPED or issues with PPS.

School comments:

**Measure 10d**

Is the school protecting the rights of English Language Learner students?

**Meets standard:**

The school materially complies with applicable laws, rules, regulations, and provisions of the charter contract (including Title III of the Elementary and Secondary Education Act, and US Department of Education authorities) relating to requirements of English Language Learners, including, but not limited to:

- Equitable access and opportunity to enroll
- Development and implementation of required plans related to the service of ELL students
- Proper steps for identification of students in need of ELL services
- Appropriate and equitable delivery of services to identified students
- Appropriate accommodations on assessments
- Exiting of students from ELL services
- Ongoing monitoring of exited students

**Does not meet standard:**

The school failed to comply with one or more applicable laws, rules, regulations, and/or provisions of the charter contract (including Title III of the Elementary and Secondary Education Act, and US Department of Education authorities) relating to requirements of English Language Learners, including, but not limited to:

- Equitable access and opportunity to enroll
- Development and implementation of required plans related to the service of ELL students
- Proper steps for identification of students in need of ELL services
- Appropriate and equitable delivery of services to identified students
- Appropriate accommodations on assessments
- Exiting of students from ELL services
- Ongoing monitoring of exited students

State Board of Education comments: N/A The school does not currently have any identified EL students enrolled.

School comments:

## 11. Governance and Reporting

### Measure 11a

Is the school complying with applicable governance requirements?

#### Meets standard:

The school materially complies with applicable laws, rules, regulations, and provisions of the charter contract relating to governance by its board, including, but not limited to:

- Board policies
- Board bylaws
- State open meetings law
- Code of ethics
- Conflicts of interest
- Board composition and/or membership rules

#### Does not meet standard:

The school was materially out of compliance with applicable laws, rules, regulations, and/or provisions of the charter contract relating to governance by its board, including, but not limited to:

- Board policies
- Board bylaws
- State open meetings law
- Code of ethics
- Conflicts of interest
- Board composition and/or membership rules

State Board of Education comments: The Ivy School's Board membership represents a wide range of expertise. (Accounting, legal, education, facilities etc.). The Board and administration continues to work with OSBA on policy development and updating policy handbooks. The board has continued to focus on building a sustainable school by supporting administration. Board meetings include regular presentations from parents and partner organizations.

School comments:

### Measure 11b

Is the school holding its administration accountable?

#### Meets standard:

The school materially complies with applicable laws, rules, regulations, provisions of the charter contract, and its own internal policies and practices relating to oversight of school administration, including, but not limited to:

- Board oversight of school administration that includes holding it accountable for performance expectations which may or may not be agreed to under a written performance agreement
- The board conducting an annual evaluation of the administrator's performance

#### Does not meet standard:

The school was materially out of compliance with applicable laws, rules, regulations, provisions of the charter contract, and its own internal policies and practices relating to oversight of school administration, including, but not limited to:

- Board oversight of school administration that includes holding it accountable for performance expectations which may or may not be agreed to under a written performance agreement
- The board conducting an annual evaluation of the administrator's performance

State Board of Education comments: The Board uses an annual evaluation tool and works closely with the administrator to provide feedback and guidance.

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

## 12. Students and Employees

### Measure 12a

Is the school protecting the rights of all students?

#### **Meets standard:**

The school materially complies with applicable laws, rules, regulations, and provisions of the charter contract relating to the rights of students, including, but not limited to:

- Policies and practices related to admissions, lottery, waiting lists, fair and open recruitment, and enrollment (including rights to enroll or maintain enrollment)
- The collection and protection of student information
- Due process protections, privacy, civil rights, and student liberties requirements, including First Amendment protections and the Establishment Clause restrictions prohibiting public schools from engaging in religious instruction
- Conduct of discipline (discipline hearings, and suspensions and expulsion policies and practices)

#### **Does not meet standard:**

The school was materially out of compliance with applicable laws, rules, regulations, and/or provisions of the charter contract relating to the rights of students, including, but not limited to:

- Policies and practices related to admissions, lottery, waiting lists, fair and open recruitment, and enrollment (including rights to enroll or maintain enrollment)
- The collection and protection of student information
- Due process protections, privacy, civil rights, and student liberties requirements, including First Amendment protections and the Establishment Clause restrictions prohibiting public schools from engaging in religious instruction
- Conduct of discipline (discipline hearings, and suspensions and expulsion policies and practices)

State Board of Education comments: The Ivy School complies with protecting the rights of all students as evidenced by board policy, family handbook, staff handbook, professional development, enrollment process and the education program. Required civil rights information and contacts are listed on the school's main webpage.

School comments:

### Measure 12b

Is the school meeting teacher and other staff credentialing requirements?

#### **Meets standard:**

The school materially complies with applicable laws, rules, regulations, and provisions of the charter contract relating to state certification requirements, including the federal Highly Qualified Teacher and Paraprofessional requirements, charter school licensure and registry requirements, and background check and fingerprinting requirements for all staff and volunteers.

#### **Does not meet standard:**

The school was materially out of compliance with applicable laws, rules, regulations, and provisions of the charter contract relating to state certification requirements, including the federal Highly Qualified Teacher and Paraprofessional requirements, charter school licensure and registry requirements, and/or background check and fingerprinting requirements for all staff and volunteers.

State Board of Education comments: The Ivy School complies with all applicable laws, rules, regulations and provisions related to staff certification requirements. The school provided information regarding teacher qualifications and legal-to-teach requirements.

School comments:

### 13. School Environment

#### Measure 13a

Is the school complying with facilities and transportation requirements?

##### **Meets standard:**

The school materially complies with applicable laws, rules, regulations, and provisions of the charter contract relating to the school facilities, grounds, and transportation, including, but not limited to:

- Americans with Disabilities Act
- Fire inspections and related records
- Viable certificate of occupancy or other required building use authorization
- Documentation of requisite insurance coverage
- Student transportation

##### **Does not meet standard:**

The school was materially out of compliance with applicable laws, rules, regulations, and provisions of the charter contract relating to the school facilities, grounds, and transportation, including, but not limited to:

- Americans with Disabilities Act
- Fire inspections and related records
- Viable certificate of occupancy or other required building use authorization
- Documentation of requisite insurance coverage
- Student transportation

State Board of Education comments: The Ivy School has current occupancy and insurance certification. The school should continue to explore options for the provision of transportation to students attending the public charter school.

School comments:

#### Measure 13b

Is the school complying with health and safety requirements?

##### **Meets standard:**

The school materially complies with applicable laws, rules, regulations, and provisions of the charter contract relating to safety and the provision of health-related services, including, but not limited to:

- Appropriate nursing services and dispensing of pharmaceuticals
- Food service requirements

##### **Does not meet standard:**

The school was materially out of compliance with applicable laws, rules, regulations, and provisions of the charter contract relating to safety and the provision of health-related services, including, but not limited to:

- Appropriate nursing services and dispensing of pharmaceuticals
- Food service requirements

State Board of Education comments: The Ivy School complies with all health and safety requirements. This is evidenced by the Family and Staff Handbook, Board policy.

School comments:

#### Measure 13c

Is the school handling information appropriately?

<p><b>Meets standard:</b></p> <p><input checked="" type="checkbox"/> The school materially complies with applicable laws, rules, regulations, and provisions of the charter contract relating to the handling of information, including, but not limited to:</p> <ul style="list-style-type: none"> <li>● Maintaining the security of and providing access to student records under the Family Educational Rights and Privacy Act (FERPA) and other applicable authorities</li> <li>● Accessing documents maintained by the school under the state’s Freedom of Information law and other applicable authorities</li> <li>● Transferring of student records</li> <li>● Proper and secure maintenance of testing materials</li> </ul>
<p><b>Does not meet standard:</b></p> <p><input type="checkbox"/> The school was materially out of compliance with applicable laws, rules, regulations, and provisions of the charter contract relating to the handling of information, including, but not limited to:</p> <ul style="list-style-type: none"> <li>● Maintaining the security of and providing access to student records under the Family Educational Rights and Privacy Act (FERPA) and other applicable authorities</li> <li>● Accessing documents maintained by the school under the state’s Freedom of Information law and other applicable authorities</li> <li>● Transferring of student records</li> <li>● Proper and secure maintenance of testing materials</li> </ul>
<p>State Board of Education comments: The Ivy School complies with all laws, rules, regulations and provisions of the charter contract relating to the handling of information. This is evidenced by the Family and Staff Handbook, Board policy and interviews with school administration and administrative staff.</p>
<p>School comments:</p>

**14. Additional Obligations**

<p><b>Measure 14a</b></p> <p>Is the school complying with all other obligations?</p>
<p><b>Meets standard:</b></p> <p><input checked="" type="checkbox"/> The school materially complies with all other applicable legal, statutory, regulatory, or contractual requirements contained in the charter contract that are not otherwise explicitly stated herein, including, but not limited to requirements from the following sources:</p> <ul style="list-style-type: none"> <li>● Revisions to state charter law</li> <li>● Intervention requirements required by the district</li> <li>● Action items assigned by the district</li> <li>● Requirements by other entities to which the charter school is accountable (e.g. ODE)</li> </ul>
<p><b>Does not meet standard:</b></p> <p><input type="checkbox"/> The school was materially out of compliance with applicable legal, statutory, regulatory, or contractual requirements contained in the charter contract that are not otherwise explicitly stated herein, including, but not limited to requirement from the following sources:</p> <ul style="list-style-type: none"> <li>● Revisions to state charter law</li> <li>● Intervention requirements required by the district</li> <li>● Action items assigned by the district</li> <li>● Requirements by other entities to which the charter school is accountable (e.g. ODE)</li> </ul>
<p>State Board of Education comments: The Ivy School was responsive and complied with any requests from ODE throughout the school year.</p>
<p>School comments:</p>

## COMMENDATIONS: ORGANIZATIONAL PERFORMANCE

- The Ivy School continues to offer a strong Montessori educational program centered on the school's mission.
- Leadership and teachers are collaborative and work well with the PPS special education team to support students.
- Strong development of the school administrative team and further clarity of roles and responsibilities.
- Teachers and assistants collaborate and support each other well. They are provided strong feedback from the administration.
- The Ivy School nutrition program is a huge success for the school community.

## RECOMMENDATIONS: ORGANIZATIONAL PERFORMANCE

- The Ivy School should continue to evaluate Montessori curriculum and standards alignment.
- The board and leadership should conduct an evaluation to understand why the school does not enroll students who are English Learners. Is it an identification issue, a barrier to access, or another reason?
- The board should continue strategic planning for the school.

**SUMMARY OF ANNUAL EVALUATION COMMENDATIONS AND RECOMMENDATIONS**

MEASURE	EXCEEDS STANDARD	MEETS STANDARD	DOES NOT MEET STANDARD	FALLS FAR BELOW STANDARD
Oregon rating system				
State and Federal accountability system				
Students Experiencing Poverty -ELA	<b>X</b>			
Students Experiencing Poverty -MATH		<b>X</b>		
ELL-ELA				
ELL-MATH				
Students with Disabilities-ELA		<b>X</b>		
Students with Disabilities-MATH		<b>X</b>		
Underserved-ELA	<b>X</b>			
Underserved-MATH			<b>X</b>	
All Student Growth-ELA	<b>X</b>			
All Student Growth-MATH			<b>X</b>	
Growth: Students Experiencing Poverty-ELA		<b>X</b>		
Growth: Students Experiencing Poverty -MATH				<b>X</b>
Growth: ELL-ELA				
Growth: ELL-MATH				
Growth: Students with Disabilities-ELA		<b>X</b>		
Growth: Students with Disabilities-Math			<b>X</b>	
Growth: Underserved-ELA		<b>X</b>		
Growth: Underserved-MATH				<b>X</b>
Alignment to CCSS		<b>X</b>		
Graduation/post-secondary readiness				
Graduation percent				
School completion/Diploma				
Drop out percentage				
Current Ratio: Assets/Liabilities		<b>X</b>		
Unrestricted Cash		<b>X</b>		
Enrollment Variance				
Loan Default		<b>X</b>		
Total Margin (income /revenue)		<b>X</b>		
Debt to Asset Ratio		<b>X</b>		
Cash Flow		<b>X</b>		
Debt Service Coverage Ratio				
Reporting and Compliance		<b>X</b>		
GAAP		<b>X</b>		
Education Program Implementation		<b>X</b>		
Education Requirement Compliance		<b>X</b>		
Rights of Students with Disabilities		<b>X</b>		
Rights of ELL				
Governance Compliance		<b>X</b>		
Administration Accountability		<b>X</b>		
Reporting Requirement Compliance		<b>X</b>		
Rights of All Students		<b>X</b>		
Staff Credentialing Requirements		<b>X</b>		
Facilities and Transportation Requirements		<b>X</b>		
Health and Safety Requirements		<b>X</b>		
Student Information		<b>X</b>		

## OVERALL COMMENDATIONS

- The Ivy School continues to make gains following the COVID-19 pandemic.
- Overall, the school's academics exceed the performance of PPS.
- Ivy meets or exceeds in all ELA categories.
- The school does have a strong tiered intervention system with child studies that should continue to be strengthened through evaluation, reflection, professional learning, and teacher collaboration.
- The Ivy School continues to have sound accounting and financial processes, with clean audits and positive net position.
- The Ivy School continues to offer a strong Montessori educational program centered on the school's mission.
- Leadership and teachers are collaborative and work well with the PPS special education team to support students.
- Strong development of the school administrative team and further clarity of roles and responsibilities.
- Teachers and assistants collaborate and support each other well. They are provided strong feedback from the administration.
- The Ivy School nutrition program is a huge success for the school community.

## OVERALL RECOMMENDATIONS

- The Ivy School should continue to evaluate Montessori curriculum and standards alignment.
- The board and leadership should conduct an evaluation to understand why the school does not enroll students who are English Learners. Is it an identification issue, a barrier to access, or another reason?
- The board should continue strategic planning for the school.
- Monitor the current assets to liabilities ratio for any further decrease.
- Take actions to elevate and bolster Math achievement for students, especially for the identified student groups.
- Continue to use iReady assessments to identify areas of improvement to deliver targeted instruction.
- Consider evaluating core instructional program and materials to ensure equitable accessibility for student groups.



# Oregon

Tina Kotek, Governor



OREGON  
DEPARTMENT OF  
EDUCATION

*Oregon achieves . . . together!*

**Dr. Charlene Williams**

Director of the Department of Education

BEFORE THE OREGON STATE BOARD OF EDUCATION

PUBLIC HEARING: Renewal Request for The Ivy School

## PUBLIC HEARING REPORT

The Department held a public hearing on January 14, 2025 from 5:00 – 6:00PM, to receive public comment on the renewal request for The Ivy School. Notice of hearing was published in a timely manner and was sent to interested parties and persons who requested notice. The public hearing was necessary to comply with ORS 338.065(5)(c). The hearing was held online via Zoom before Christen Kelly, Charter School Specialist and Jennifer Scurlock, Chair of the Oregon State Board of Education. Kate Pattison, Director of the School Choice, Options and Recovery Education Team and Corey Rosenberg, State Board of Education Administrator, also represented the Department at the hearing.

A sign-up form was shared with interested parties with notice of the hearing and allowed members of the community to provide written testimony or indicate interest in speaking at the hearing.

- 11 members of the Ivy community attended the public hearing.
- 6 people spoke at the public hearing. Everyone who spoke was in favor of the renewal of the charter school.
- 17 people submitted written testimony through the sign-up form for the public hearing. No one provided written testimony that was opposed to the renewal.
- 2 people indicated support for the renewal through the sign-up form for the public hearing but did not speak or submit further written testimony.
- 2 people submitted written testimony via e-mail to the Charter School Specialist directly.

Participants expressed high levels of satisfaction with the school and reported it was the best fit for their child. Many reported enthusiasm for the fact that the leadership, teachers, and school team are responsive, innovative, and deeply committed to serving diverse student needs. Staff and parents commented on the strong community and the culture of inclusivity that allows students to develop socially, emotionally and academically. Many also commented on the importance of having an option for children from all socioeconomic backgrounds to access Montessori learning methods at no cost.

Report compiled by Christen Kelly, Charter School Specialist

*Christen Kelly*

February 1, 2025

## Written Testimony Regarding The Ivy School Renewal

**Name:** Nicholas Volger

**Relationship to the school:** Staff

**Do you support the renewal?** Yes

**Testimony:** My name is Nicholas Volger and I am the new Middle School Humanities teacher at the Ivy Montessori School in Portland. Throughout my teaching career, I have yet to witness a school atmosphere like the one that staff and administration at the Ivy School has built. Each day I am continually impressed by Ivy's dedication to inspiring students to be independent learners and thinkers while simultaneously providing them with necessary support as they develop both socially and emotionally. The Ivy School environment is one that is unique, warm, inviting -- the type that I would want my own children to be immersed in. An aspect that I have grown very fond of at the Ivy School, is their dedication to equity, inclusion through the work around and in congruence with the community outside of the grounds of campus.

The administration and staff's dedication to equity, inclusion, and to the community, seeps into the DNA of the students, who then strive to make their environments around themselves better each and every day. Students are byproducts of their environment, and the environment at Ivy yields students who are intelligent, compassionate, and conscientious young people, whom I wholeheartedly believe are and will be successful and valued members in their communities. Everyday, I am amazed at the intelligent, thoughtful, and insightful conversations I have with these kids.

I am profoundly in favor of the charter renewal for the Ivy School. It is a unique atmosphere that immensely benefits children academically, socially and emotionally. When students are supported in each of these ways during these crucial years of their adolescence they grow up to become well rounded individuals and therefore improve the community and world around us. Thank you for your time and consideration on this matter.

**Name:** Boris Kaidanov

**Relationship to the school:** Community Member

**Do you support the renewal?** Yes

**Testimony:** Just lending my voice here to say that the Ivy School is a wonderful community, and I'd strongly advocate for the state to renew their license. I help lead the chess club at Ivy, and can't say enough about the staff and their relationship with the students and just how much they care. It's a wonderful place.

**Name:** Carrie Twigg

**Relationship to the school:** Parent, Family Member, Guardian

**Do you support the renewal?** Yes

**Testimony:** I'm writing in support of renewing the charter of The Ivy School. I have had a child at Ivy since 2014 and it has always been a safe, welcoming space. My daughter is in her (final) 8th grade year at Ivy and plans to attend Lincoln HS with her brother. He is a thriving Junior this year and is experiencing success socially, emotionally, and academically. He was well prepared for high school, despite completing 7th grade completely online. Please renew the charter so other children will have the same lovely experience mine did.

## Written Testimony Regarding The Ivy School Renewal

**Name:** Emma Parzybok

**Relationship to the school:** Staff

**Do you support the renewal?** Yes

**Testimony:** I have worked at Ivy for 3 years now and have been so inspired by the community and hard work the students are engaging in. This school represents everything I so needed as a child. The staff is incredibly compassionate and educated. At Ivy we strive to meet every child's needs and support them through this time of their life.

**Name:** Sara James

**Relationship to the school:** Parent, Family Member, Guardian

**Do you support the renewal?** Yes

**Testimony:** As a parent in the Ivy School community since 2017, we have felt very grateful for this school and the teachers/administrators it employs. My eldest child has had many social, emotional, and academic upsets over the years, and I know she would have struggled immensely in a standard school setting. At the Ivy School, the teachers and admins worked with us to find solutions. This school focuses on academic rigor, sure, but as a parent, I find it more important that they focus on social skills and well-being. They know children learn better when they feel safe, and they do everything they can to empower children to be advocates for themselves and others in their community.

**Name:** Erin Bishop M.S., CCC-SLP

**Relationship to the school:** Staff

**Do you support the renewal?** Yes

**Testimony:** My name is Erin Bishop, and I have had the privilege of serving as the speech-language pathologist at Ivy for the past five years. In this time, I have witnessed firsthand the critical role this Montessori-based charter school plays in our community as an essential alternative to the public schools of Portland.

Our school's commitment to embracing a diverse range of learners, especially neurodiverse students, has created an environment where every child is empowered to thrive. Through individualized approaches, Ivy provides a safe and nurturing space for students who may otherwise struggle in traditional educational settings. The Montessori philosophy fosters self-motivation, creativity, and personal growth, helping students develop not only academically but socially and emotionally.

I have seen students with unique learning needs flourish here after traditional schools were not able to meet their needs. Ivy's dedication to understanding and meeting these needs ensures that each student has the opportunity to succeed in their own way, surrounded by peers and staff who value their strengths.

Renewing this school's charter is not just about maintaining a school for all but preserving an educational space for some students who can feel unseen or unsupported elsewhere. This is a place where children learn to love learning, embrace their individuality, and grow into confident, capable individuals.

Thank you for considering the charter renewal of Ivy. By doing so, you are investing in a brighter future for our community's students, families, and the inclusive values we all cherish.

**Name:** Racheadia Mullins

**Relationship to the school:** Parent, Family Member, Guardian

**Do you support the renewal?** Yes

**Testimony:** I [am] Racheadia Mullins, parent of Sa'Moara, 3rd grade of The Ivy Montessori School. I approached this situation. What deep concern of why we would not renew the contract of The Ivy Montessori school? It has played a very good detrimental role in my daughter's life. From day one, she has difficulties with adjusting. They have given her the skills not only kept her on track academically. But we have been working together and exercise different programs right? Which other schools don't enforce?

## Written Testimony Regarding The Ivy School Renewal

That's such thing. What's that being sad? I'm pretty sure I'm not the only parent that stand for with this decision, it even happened to be a contract for however many years this should be. An infinity contract in my eyes. Coming from a different state Minneapolis Minnesota, to be specific. I feel that the teacher's counselor's principals, coaches, lunch ladies, including the students, I have grown to become as such as a family. Our children look forward to go to school. From when I moved here and she began to go to school in Gresham, she hated going to school. Now she wakes up wanting to go to school, wanting to learn wanting to see her teachers wanting to see her friends. She now feels accepted. I no longer have to have conversations about her looking different, acting different or wanting to be different because her school has allowed her meaning.

The Ivy Montessori School has allowed her to be herself and to be accepted for who she is or what she feels they've done up great job with my child, as well as I witness them do a great job with other children within the school as far as I've seen him do. Um, I just I don't understand why we have to come up like this. It should be an automatic renewal. Our numbers are great, you know what? I'm saying our children scores are up. Education is important. Filling accepted to education is important. Cause it starts with education from what I know. Of my knowledge, and I'm 39. Still won a school PCC up the street from my daughter's school, which she wants to attend to till she's in eighth grade. Why should that have to be a disappointment to her? Or any other children? The seventh graders, who probably sad in awe, because they can't they're thinking they may not go to the same school to graduate and their older siblings probably graduated from the school. I feel that there's no question or doubt in a world that the Ivy Montessori School should definitely have an infinity contract. And this shouldn't even have to happen. No more coming in front of the educational board. Being questioned happened up, feel pressured to provide comfortability. As well as education.

Acceptance, as well as education skills as well as education also that maternity skilled, that a lot of people don't have is provided at the Ivy Montessori school. Please Don't close our school.

**Name:** Beatrice Yanazzo

**Relationship to the school:** Parent, Family Member, Guardian

**Do you support the renewal?** Yes

**Testimony:** Ivy provides a unique experience for education in N/NE Portland. As a Montessori school available at no cost to families it allows for an alternative to traditional public schooling from pre-school through middle school in a supportive setting. Personally, my now 3rd grader has had the opportunity to develop at her pace, advanced in some areas, behind some peers in others but continues learning and loving to learn while not getting frustrated or feeling like she is behind. For my children and others to come I hope this school continues as a benefit to the community.

**Name:** Aychiluhim Mitiku

**Relationship to the school:** Parent, Family Member, Guardian

**Do you support the renewal?** Yes

**Testimony:** My name is Aychiluhim Mitiku, and I am a parent in the IVY school community. I am grateful for the opportunity to provide public comment regarding the renewal of the school's charter. Although I am relatively new, having been involved with IVY school for only the past week, I have already witnessed the school's strong dedication to the educational growth and well-being of its students, particularly for newcomers. The academic rigor, community engagement, and support for diverse learners to help them assimilate into the system are commendable. I believe these strengths should be preserved and further developed. I fully support the renewal of IVY's charter and urge the committee to approve it to ensure the school's continued success. Thank you for your time and consideration.

**Name:** Noel Plemmons

**Relationship to the school:** Parent, Family Member, Guardian

**Do you support the renewal?** Yes

## Written Testimony Regarding The Ivy School Renewal

**Testimony:** We searched far and wide for a school that would be a good fit for our adoptive son. He needed a place where he could stay within his age and grade range while also having the flexibility to catch up on curriculum he missed during years of neglect and trauma while in the care of his bio parents. We found the Ivy School and it is the right model for him. It provides that flexibility and also provides him and us with the longevity he needs to build friendships and community connections for years to come (through 8th grade). In 5th grade, for the first time in his life, he has friends and play dates, and he's finally learning to read! The Ivy School is an essential alternative to standard public education with a rigorous curriculum that strongly promotes self-respect and social responsibility. Please renew its charter for another ten years!

**Name:** Eboni Spruill

**Relationship to the school:** Parent, Family Member, Guardian

**Do you support the renewal?** Yes

**Testimony:** I'm new to the Ivy school this year and must say that this has been the most supportive education for my son. The sense of community, inclusivity and trust has been amazing. The Ivy staff had created space for me to build connection, but also learn from me as the parent around my son needs. I'm honored to be a part of this community and support them with extending the contract so that all students can continue to thrive and learn in ways that's best for them. Ivy school is also a great opportunity for our underserved communities/families who don't always have access to these types of educational settings. Thank you Ivy staff for all the love and support you have shown to my family.

**Name:** Jason Hooper

**Relationship to the school:** Parent, Family Member, Guardian

**Do you support the renewal?** Yes

**Testimony:** The Ivy School has been a gift for our family. Our son is learning more than math, science and reading. He is learning how to be the best person he can be at The Ivy School. The staff and other families at the school have been an amazing support as our child grows up in the world.

**Name:** Leigh Feldman and Sara Moskovitz

**Relationship to the school:** Parents, Family Member, Guardian

**Do you support the renewal?** Yes

**Testimony:** I am writing to express my strong support for Ivy's continued charter recognition. As a parent of multiple children attending Ivy, I have witnessed firsthand the exceptional educational environment they provide and the profound impact it has had on my family.

What sets Ivy apart is their remarkable ability to meet each child's individual needs. For our 6th grader, they have created an environment that encourages exploration of interests, fostering a genuine love of reading, researching, and hands-on building. For our 3rd grader, Ivy consistently provides appropriately challenging academic work, pushing them to reach their full potential and arrive at answers in unique ways, helping foster an understanding that creative thought matters.

But most importantly, we are most impacted by Ivy's dedication to truly supporting students wherever they are. Our 1st grader that attends Ivy presents unique challenges. When he first began struggling with even entering school in the morning, the staff went above and beyond to work directly with our family. They developed personalized strategies and maintained open communication, demonstrating their commitment to every student's success before, during, and after school. The patience and willingness to work with us as parents, directly with our son, and our outside support network, highlighted Ivy's commitment to students' emotional, social, and physical well-being, and we are hard pressed to believe that we would have been given the same support and understanding at a public school in the PPS system.

The Ivy School is what charter education should be, and they consistently show us that we made the right choice to join this community: the leadership, teachers, and entire school team are responsive, innovative,

## Written Testimony Regarding The Ivy School Renewal

and deeply committed to serving diverse student needs. Ivy's continued recognition is not just important for my family, but for all families seeking an education that truly adapts to and nurtures each child's unique potential.

I strongly urge you to maintain Ivy's charter status, allowing them to continue their vital work in building, maintaining, and providing community.

**Name:** Hannah Ungar

**Relationship to the school:** Staff

**Do you support the renewal?** Yes

**Testimony:** This is the best school I have ever worked at. Nikki is an extraordinary boss. There is so much care and love that goes into this school.

**Name:** Heather Storie

**Relationship to the school:** Parents, Family Member, Guardian

**Do you support the renewal?** Yes

**Testimony:** This is our first year with the Ivy School but we can already see our son thriving thanks to this positive, refreshing learning environment. We are parents to a cautious, neurodivergent child who we see happily engaged and eager to learn.

More importantly, our son (who up until now has been painfully shy) transitioned seamlessly into a class full of mixed aged students. This mixed age approach (in our case 1st-3rd grade) allows students to rely more on each other, which seems to promote unity and understanding over exclusion. Something our country desperately needs to be teaching our children. Here, he feels safe and accepted. He feels respected, by teachers and peers. He is encouraged to move about the classroom throughout the workday and work at his own pace. He is encouraged to listen to his needs, and also respect the needs of others. He's empowered to make his own choices about his educational journey.

We have been impressed to hear that the class provides time each week to practice life skills such as conflict resolution and mindfulness. We've also been happy to see far less use of screens compared to other schools in the area. We want more than anything for him to continue his journey with the Ivy School. Better yet, he wants to continue his journey with the Ivy School. We know he is flourishing because of Ivy's focus on independent, child-led learning.

Beyond our personal experience I would also like to highlight the importance of all Portland families having a free Montessori option. The Ivy School gives children from all socioeconomic backgrounds the opportunity to access alternative learning methods at no cost. All parents and students deserve options, tuition-free options, as we know the 'one-size-fits-all' approach to education does not work. Out of all of the tuition-free charter schools here in Portland, we have found The Ivy School to be the most inclusive and we are so fortunate to be part of this warm community. We hope others can experience the same for years to come.

Lastly, The Ivy School is particularly important to the residents of North Portland. This urban location allows families to walk, bike, take the Max or bus - truly providing easy access for everyone. The Ivy School has worked diligently to build a thoughtful community in North Portland over the past 10 years. It would be incredibly disappointing to see this 'educational gem' disappear.

**Name:** Jordan Skeen

**Relationship to the school:** Staff

**Do you support the renewal?** Yes

**Testimony:** The Ivy School is a wonderful, unique school that brings so much joy, positivity and learning to the community. After working at The Ivy School for 2 years, I can without a doubt state that this school is fully committed to fostering a true Montessori educational environment. Every single day, administration and staff inspire students of diverse backgrounds to be independent learners who value responsibility,

## Written Testimony Regarding The Ivy School Renewal

curiosity, compassion, leadership and who embody peace. I've been an Assistant Teacher in lower and upper elementary, I've been a substitute teacher in almost every class, and am currently the learning intervention specialist at Ivy. The children I meet with everyday tell me that coming to school is their safe space or their favorite place to be - I take so much pride working at a school that puts the needs and development of the students first. The sense of community between staff, students and parents is absolutely unmatched. The Ivy School consistently puts in the work to make sure we are a diverse and equitable space - the administration at Ivy is always setting up opportunities for professional development for all of us to learn and grow. We are consistently doing equity work and bringing that with us into our classrooms. I feel so blessed to work at The Ivy School and I know so many students and families feel the same way. There is no question in my mind that The Ivy School should have their charter renewed for another 10 years - it will undoubtedly bring endless joy, learning and peace to this community.

**Name:** Kate Mullican

**Relationship to the school:** Parents, Family Member, Guardian

**Do you support the renewal?** Yes

**Testimony:** Thank you for allowing email testimony regarding the review of The Ivy School (Portland) charter. I am writing to share that as a parent of two children, who either are or have previously attended The Ivy School, I would be immensely pleased to learn that the charter has been renewed.

My oldest child attended the Ivy school from first through eighth grade and is now a high school student with a 4.0 GPA, thriving socially, feeling confident to explore a wide range of classes and clubs, and has the study skills to manage two AP courses as a sophomore. My youngest child is currently a sixth grader who has some special needs in how she learns best. Girls her age and with her diagnosis can often start to shrink, but instead she loves going to school! She is given space to be a leader and to be uniquely herself.

I credit the many talented teachers and the dedicated administrative team for their leadership in the ways that they work to build the community. It is evident that they work as best they can to ensure that each member of The Ivy School feels welcomed. Over the course of a decade that I have been in the parent community of the school, I have witnessed the ways in which the leadership has shown great flexibility (pandemic times), creative problem-solving (fundraising to buy the school's building), and a whole lot of passion for the work that they do to bring Montessori Pedagogy to those of us who would not be able to afford it in our area's private schools.

As a Montessori educator myself, I know what it looks like to feel passionate about the work and I also know that it is the best fit for my children. Additionally, as a Montessori educator, I cannot afford this style of education in Portland unless the charter option is available. Montessori pedagogy at its roots is a peace education, honoring each individual for their unique gifts with the recognition that we thrive in community when each of these gifts is allowed to flourish. Montessori classrooms make room for a very wide scope of learning styles and interests and needs supporting the whole child on their natural course of development.

I ask you to please renew The Ivy School charter. The community there is thriving!



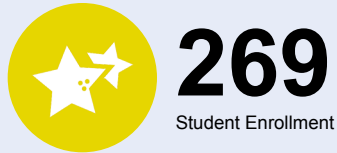
# OREGON AT-A-GLANCE SCHOOL PROFILE

## The Ivy School



PRINCIPAL: Nikki Jones | GRADES: K-8 | 5420 N. Interstate, Portland 97217 | 503-288-8553

### Students We Serve



### DEMOGRAPHICS

American Indian/Alaska Native	
Students	<1%
Teachers	0%
Asian	
Students	3%
Teachers	0%
Black/African American	
Students	7%
Teachers	12%
Hispanic/Latino	
Students	11%
Teachers	0%
Multiracial	
Students	9%
Teachers	6%
Native Hawaiian/Pacific Islander	
Students	0%
Teachers	0%
White	
Students	70%
Teachers	82%

\* **8** Languages Spoken

**20%** Students with Disabilities

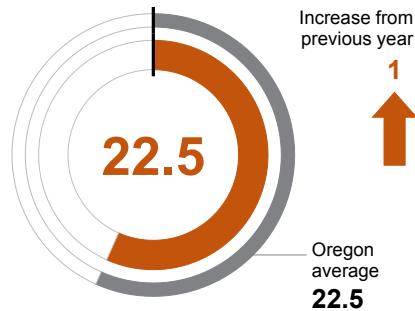
**75%** Required Childhood Vaccinations

**15%** Students Experiencing Poverty

\*<10 students or data unavailable

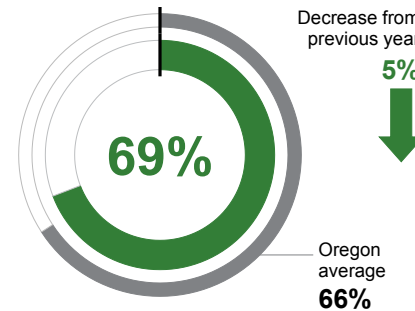
### School Environment

**CLASS SIZE**  
Median class size.



**REGULAR ATTENDERS**

Students who attended more than 90% of their enrolled school days.

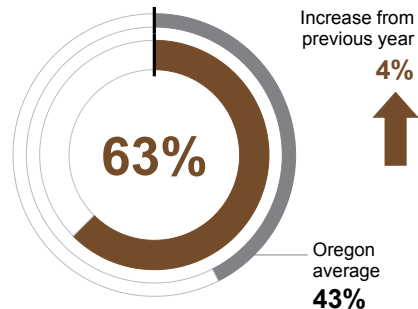


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### Academic Success

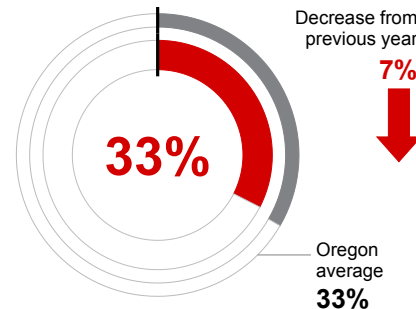
#### ENGLISH LANGUAGE ARTS

Students meeting state grade-level expectations.



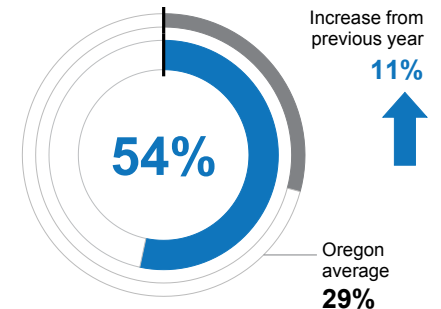
#### MATHEMATICS

Students meeting state grade-level expectations.



#### SCIENCE

Students meeting state grade-level expectations.



### School Goals

At Ivy we strive to meet the needs of the whole child. In order to deliver quality education to our students we take into account social skills, physical and emotional well-being as well as academics. We work to help children realize their strengths and then use those strengths to work on areas of challenge. Montessori teachers place a high value on objective observation, individual conferencing and progress monitoring as a means of understanding and meeting each child's distinct needs.

### State Goals

The Oregon Department of Education is collaborating with school districts and communities across the state to achieve a 90% on-time graduation rate by 2027. Grounded in the pillars of Academic Excellence, Belonging and Wellness, and Reimagined Accountability, ODE prioritizes evidence-based practices to boost early literacy, attendance, and student engagement. We are committed to closing opportunity and achievement gaps for marginalized students and securing long-term success for all of Oregon's learners by investing in culturally responsive practices, fostering inclusive environments and always driving for continuous improvement.

### Safe & Welcoming Environment

Students are integrated not only in terms of subject matter, but also in terms of moral learning as well, which we call "Grace and Courtesy." This learning results in appreciation and respect for life, a moral empathy and a fundamental belief in progress, the contribution of the individual, the human condition in the world, and the meaning of true justice. The Ivy school Community actively commits to anti-racist/anti-bias education to ensure all students reach their full Potential. Community members are asked to sign and to commit to the Ivy school Equity Code.



# OREGON AT-A-GLANCE SCHOOL PROFILE CONTINUED

## The Ivy School

2023-24

### Outcomes

#### Our Staff (rounded FTE)



**15**

Teachers



**0**

Educational assistants



**0**

Counselors/  
Psychologists/  
Social Workers



**76%**

Average teacher retention rate over the past three years



**83%**

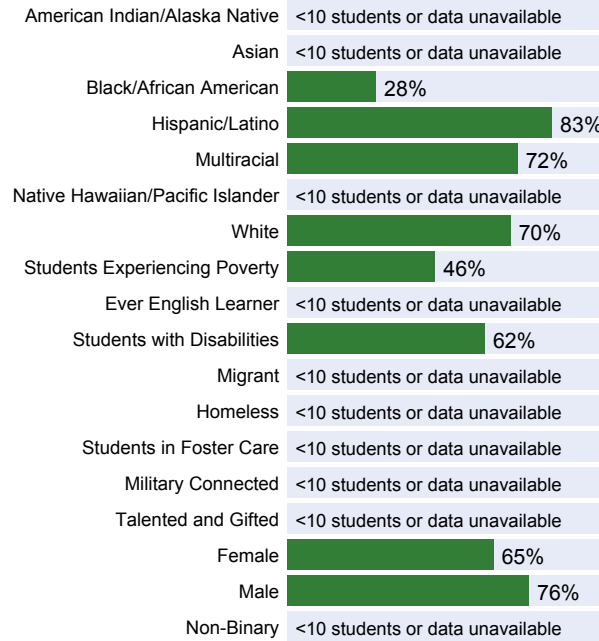
% of licensed teachers with more than 3 years of experience



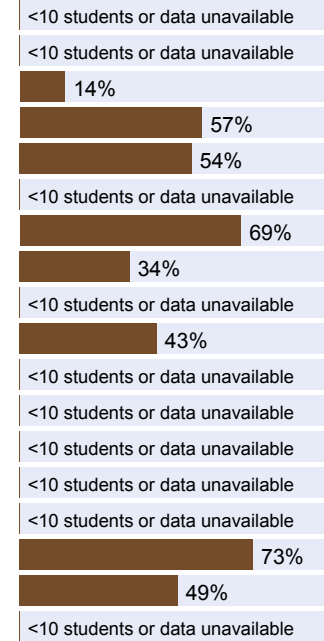
**Yes**

Same principal in the last 3 years

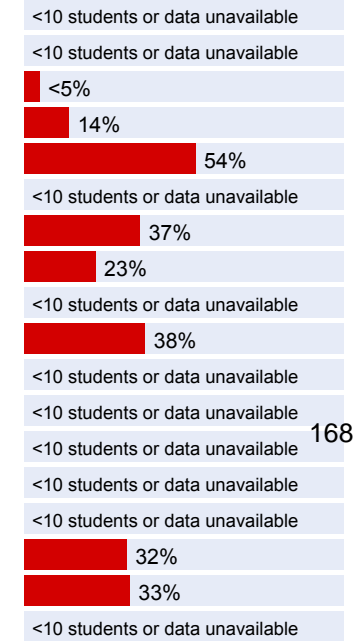
#### REGULAR ATTENDERS



#### ENGLISH LANGUAGE ARTS



#### MATHEMATICS



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### About Our School

#### BULLYING, HARASSMENT, AND SAFETY POLICIES

The Ivy school works to ensure that our school is a safe place for all students and employees. The school has an emergency preparedness plan in place in case of emergencies. All staff members have had training in Equitable practices, Safe Schools, and Title 9.

#### EXTRACURRICULAR ACTIVITIES

The Ivy school offers many extracurricular activities:

- Monthly Spirit Days
- Movie Nights
- UN Day
- Arts Week
- Right Brain Initiative Guest Artist
- International Peace Celebrations
- Gear Crest Farms
- Outdoor School
- 7th grade Overnight (Opal Creek)
- 8th Grade End of the Year Overnight
- Philosophy for Children PSU Partnership
- Monthly Field Trips: Food banks, Forestry Center, Art and Cultural Activities

#### PARENT ENGAGEMENT

The Ivy school engages parents by hosting a variety of events intended for parents:

- Back to School registration
- Back to School Ice Cream Social
- Montessori Parent Education Nights
- Open Houses
- Art Week
- End of the Year School Community Party

Parent participation in student led conferencing is nearly 100%

#### COMMUNITY ENGAGEMENT

The Ivy School Strives to promote the partnership between parents, teachers, and the school community. The Ivy PTA, parents and community members partner closely with the Ivy School leadership to align goals and provide support each school year.

The Ivy school welcomes and highly encourages volunteerism. Every classroom at Ivy has a room parent. Volunteers and community members can be observed making materials, reading to students and interacting with staff and students in a way that enriches student learning.

# 2023-24 ESSA Accountability Details Report

Public Version - November 21, 2024

**District:** Oregon Department of Education

**School:** The Ivy School

The Accountability Details Report displays the data for indicators used to identify schools for comprehensive or targeted supports as required by Oregon's State Plan under the Every Student Succeeds Act (ESSA). The accountability system uses six indicators for elementary and middle schools. For more information about the included indicators and their definitions and calculations, please refer to the [Accountability Details Policy and Technical Manual](#). Arrows (up ↑ or down ↓) indicate the change in the rating level of the indicator from the previous year.

## Indicator Ratings Table

Student Group	ESSA Supports	ELA Achievement	ELA Change	Math Achievement	Math Change	Regular Attenders	On Track to ELP
All Students	Not Identified	Level 3	Level 4	Level 2	Level 5	Level 2	Not Rated
Students Experiencing Poverty	Not Identified	Level 2	Not Rated	Level 2	Not Rated	Level 2	
English Learners	Not Identified	Not Rated	Not Rated	Not Rated	Not Rated	Not Rated	Not Rated
Students with Disabilities	Not Identified	Level 2	Level 4 ↓	Level 2	Level 5	Level 2	
Underserved Race/Ethnicity	Not Identified	Level 2	Level 2 ↓	Level 2	Level 2 ↓	Level 2	
American Indian/ Alaska Native	Not Identified	Not Rated	Not Rated	Not Rated	Not Rated	Not Rated	
Native Hawaiian/ Pacific Islander	Not Identified	Not Rated	Not Rated	Not Rated	Not Rated	Not Rated	
Black/African American	Not Identified	Level 2	Not Rated	Level 1 ↓	Not Rated	Level 2	
Hispanic/Latino	Not Identified	Level 2	Level 3	Level 2	Level 3 ↓	Level 2	
Asian	Not Identified	Not Rated	Not Rated	Not Rated	Not Rated	Not Rated	
White	Not Identified	Level 3	Level 5 ↑	Level 2 ↓	Level 5	Level 2	
Multi-racial	Not Identified	Level 3 ↑	Not Rated	Level 2	Not Rated	Level 2 ↓	

Suggested Level of Support: **Not Identified**

Year Identified: **Not Identified**

Met ELA and Math Participation target (95%) for all student groups: **No** (details on pages 4 and 7)

Received Title I Funds in 2023-24: **No**

Please note the following:

- Indicator ratings that display 'Not Rated' refer to student groups that do not meet the minimum n-size of 20 to receive a rating.
- The Students Experiencing Poverty student group includes students that received SNAP/TANF benefits, were in foster care, experienced homelessness, or received migrant services. Students Experiencing Poverty replaced the formerly used Economically Disadvantaged student group.
- The English Learner student group has different inclusion rules depending on the indicator.
- The Underserved Race/Ethnicity student group consists of the following racial/ethnic groups: American Indian/Alaska Native, Black/African American, Hispanic/Latino, and Native Hawaiian/Pacific Islander.

## English Language Arts Academic Achievement Details

**District:** Oregon Department of Education

**School:** The Ivy School

English Language Arts Achievement Level	Cut
Level 5	80
Level 4	67
Level 3	54
Level 2	18
Level 1	<18

The English Language Arts (ELA) Achievement indicator displays the percentage of students meeting the ELA achievement standard, the adjusted denominator, and the corresponding rating for each student group. The data table shows three years of data and the three-year average. Student groups are assigned a rating based on the three-year average. '\*' means data was hidden to protect student confidentiality and 'Not Rated' refers to student groups that do not meet the minimum n-size of 20 to receive a rating. Note that the Students Experiencing Poverty student group replaced the formerly used Economically Disadvantaged student group.

### State Long Term Goal: 80%

Student Group	2021-22	2022-23	2023-24	3-year Average	Level
All Students - Percent	57.6	59.3	62.6	60.7	Level 3
All Students - Adjusted Denominator	172	172	190	527	
Students Experiencing Poverty - Percent	41.4	37.5	34.4	38.5	Level 2
Students Experiencing Poverty - Adjusted Denominator	29	32	32	91	
English Learners - Percent	*	*	*	*	Not Rated
English Learners - Adjusted Denominator	*	*	*	*	
Students with Disabilities - Percent	42.1	45.7	41.9	43.1	Level 2
Students with Disabilities - Adjusted Denominator	38	35	43	116	
American Indian/Alaska Native - Percent	*	*	*	*	Not Rated
American Indian/Alaska Native - Adjusted Denominator	*	*	*	*	
Black/African American - Percent	20.0	21.4	13.3	19.0	Level 2
Black/African American - Adjusted Denominator	15	14	15	42	
Hispanic/Latino - Percent	52.2	42.1	57.1	51.6	Level 2
Hispanic/Latino - Adjusted Denominator	23	19	21	62	
Native Hawaiian/Pacific Islander - Percent	*	*	*	*	Not Rated
Native Hawaiian/Pacific Islander - Adjusted Denominator	*	*	*	*	
Underserved Race/Ethnicity - Percent	42.1	34.3	41.7	40.2	Level 2
Underserved Race/Ethnicity - Adjusted Denominator	38	35	36	107	
Asian - Percent	*	*	*	63.6	Not Rated
Asian - Adjusted Denominator	*	*	*	*	
White - Percent	61.3	66.4	69.3	66.8	Level 3
White - Adjusted Denominator	119	125	137	376	
Multi-racial - Percent	57.1	40.0	53.8	54.3	Level 3
Multi-racial - Adjusted Denominator	14	10	13	35	

## English Language Arts Average Gap Score Change Details

**District:** Oregon Department of Education

**School:** The Ivy School

The English Language Arts (ELA) Average Gap Score Change indicator uses the difference between a student's score and the cut score for the assessment, called a gap score. The table displays the average gap score by school year, the change in the average gap score, the count of students tested, and the corresponding rating for each student group. '\*' means data was hidden to protect student confidentiality and 'Not Rated' refers to student groups that do not meet the minimum n-size of 20 to receive a rating. Note that the Students Experiencing Poverty student group replaced the formerly used Economically Disadvantaged student group.

ELA Average Gap Score Change	Cut
Level 5	5
Level 4	-7
Level 3	-19
Level 2	-42
Level 1	<-42

Student Group	2018-19	2023-24	Change in Average	Level
All Students	14	17	3	Level 4
All Students - Denominator	169	189		
Students Experiencing Poverty	-33	-50	-17	Not Rated
Students Experiencing Poverty - Denominator	14	31		
English Learners	*	*	*	Not Rated
English Learners - Denominator	*	*		
Students with Disabilities	-40	-37	3	Level 4
Students with Disabilities - Denominator	34	42		
American Indian/Alaska Native	*	*	*	Not Rated
American Indian/Alaska Native - Denominator	*	*		
Black/African American	*	-113	*	Not Rated
Black/African American - Denominator	*	13		
Hispanic/Latino	-8	-26	-18	Level 3
Hispanic/Latino - Denominator	23	21		
Native Hawaiian/Pacific Islander	*	*	*	Not Rated
Native Hawaiian/Pacific Islander - Denominator	*	*		
Underserved Race/Ethnicity	-21	-57	-36	Level 2
Underserved Race/Ethnicity - Denominator	27	35		
Asian	*	*	*	Not Rated
Asian - Denominator	*	*		
White	27	39	12	Level 5
White - Denominator	127	137		
Multi-racial	-14	-4	10	Not Rated
Multi-racial - Denominator	10	13		

## English Language Arts Participation Details

**District:** Oregon Department of Education

**School:** The Ivy School

All students in tested grades and enrolled on the first school day in May must take a statewide assessment. The data table displays the percentage of students who took a statewide assessment by school year and student group. Student groups are assigned a rating based on the three-year average. 'Not Rated' means the student group did not meet minimum n-size of 20 to receive a rating. Note that the Students Experiencing Poverty student group replaced the formerly used Economically Disadvantaged student group.

### Participation Target: 94.5%

Student Group	2021-22	2022-23	2023-24	3-year Average	Status
All Students - Percent	90.1	94.5	97.9	94.3	Not Met
All Students - Denominator	182	182	194	558	
Students Experiencing Poverty - Percent	93.3	93.9	97.0	94.8	Met
Students Experiencing Poverty - Denominator	30	33	33	96	
English Learners - Percent	50.0	100.0	*	66.7	Not Rated
English Learners - Denominator	2	1	*	3	
Students with Disabilities - Percent	82.9	89.2	93.3	88.6	Not Met
Students with Disabilities - Denominator	41	37	45	123	
American Indian/Alaska Native - Percent	100.0	100.0	100.0	100.0	Not Rated
American Indian/Alaska Native - Denominator	1	2	1	4	
Black/African American - Percent	93.3	85.7	93.3	90.9	Not Met
Black/African American - Denominator	15	14	15	44	
Hispanic/Latino - Percent	91.7	95.0	100.0	95.4	Met
Hispanic/Latino - Denominator	24	20	21	65	
Native Hawaiian/Pacific Islander - Percent	*	*	*	*	Not Rated
Native Hawaiian/Pacific Islander - Denominator	*	*	*	*	
Underserved Race/Ethnicity - Percent	92.5	91.7	97.3	93.8	Not Met
Underserved Race/Ethnicity - Denominator	40	36	37	113	
Asian - Percent	100.0	100.0	100.0	100.0	Not Rated
Asian - Denominator	2	5	4	11	
White - Percent	90.5	95.4	97.9	94.7	Met
White - Denominator	126	131	140	397	
Multi-racial - Percent	78.6	90.0	100.0	89.2	Not Met
Multi-racial - Denominator	14	10	13	37	

# Mathematics Academic Achievement Details

**District:** Oregon Department of Education

**School:** The Ivy School

Mathematics Achievement Level	Cut
Level 5	80
Level 4	62
Level 3	43
Level 2	8
Level 1	<8

The Mathematics Achievement indicator displays the percentage of students meeting the Mathematics achievement standard, the adjusted denominator, and the corresponding rating for each student group. The data table shows three years of data and the three-year average. Student groups are assigned a rating based on the three-year average. '\*' means data was hidden to protect student confidentiality and 'Not Rated' refers to student groups that do not meet the minimum n-size of 20 to receive a rating. Note that the Students Experiencing Poverty student group replaced the formerly used Economically Disadvantaged student group.

## State Long Term Goal: 80%

Student Group	2021-22	2022-23	2023-24	3-year Average	Level
All Students - Percent	37.8	39.5	32.8	37.0	Level 2
All Students - Adjusted Denominator	172	172	189	527	
Students Experiencing Poverty - Percent	17.2	25.0	21.9	22.0	Level 2
Students Experiencing Poverty - Adjusted Denominator	29	32	32	91	
English Learners - Percent	*	*	*	*	Not Rated
English Learners - Adjusted Denominator	*	*	*	*	
Students with Disabilities - Percent	28.9	34.3	37.2	33.6	Level 2
Students with Disabilities - Adjusted Denominator	38	35	43	116	
American Indian/Alaska Native - Percent	*	*	*	*	Not Rated
American Indian/Alaska Native - Adjusted Denominator	*	*	*	*	
Black/African American - Percent	6.7	14.3	<5	7.1	Level 1
Black/African American - Adjusted Denominator	15	14	*	*	
Hispanic/Latino - Percent	26.1	25.0	14.3	22.6	Level 2
Hispanic/Latino - Adjusted Denominator	23	20	21	62	
Native Hawaiian/Pacific Islander - Percent	*	*	*	*	Not Rated
Native Hawaiian/Pacific Islander - Adjusted Denominator	*	*	*	*	
Underserved Race/Ethnicity - Percent	18.4	22.9	11.4	17.8	Level 2
Underserved Race/Ethnicity - Adjusted Denominator	38	35	35	107	
Asian - Percent	*	*	*	18.2	Not Rated
Asian - Adjusted Denominator	*	*	*	*	
White - Percent	45.4	46.0	36.5	42.9	Level 2
White - Adjusted Denominator	119	124	137	375	
Multi-racial - Percent	28.6	20.0	53.8	37.1	Level 2
Multi-racial - Adjusted Denominator	14	10	13	35	

## Mathematics Average Gap Score Change Details

**District:** Oregon Department of Education

**School:** The Ivy School

The Mathematics Average Gap Score Change indicator uses the difference between a student's score and the cut score for the assessment, called a gap score. The table displays the average gap score by school year, the change in the average gap score, the count of students tested, and the corresponding rating for each student group. '\*' means data was hidden to protect student confidentiality and 'Not Rated' refers to student groups that do not meet the minimum n-size of 20 to receive a rating. Note that the Students Experiencing Poverty student group replaced the formerly used Economically Disadvantaged student group.

Math Average Gap Score Change	Cut
Level 5	4
Level 4	-11
Level 3	-24
Level 2	-49
Level 1	<-49

Student Group	2018-19	2023-24	Change in Average	Level
All Students	-44	-40	4	Level 5
All Students - Denominator	167	188		
Students Experiencing Poverty	-69	-101	-32	Not Rated
Students Experiencing Poverty - Denominator	12	31		
English Learners	*	*	*	Not Rated
English Learners - Denominator	*	*		
Students with Disabilities	-112	-62	50	Level 5
Students with Disabilities - Denominator	33	42		
American Indian/Alaska Native	*	*	*	Not Rated
American Indian/Alaska Native - Denominator	*	*		
Black/African American	*	-164	*	Not Rated
Black/African American - Denominator	*	13		
Hispanic/Latino	-73	-87	-14	Level 3
Hispanic/Latino - Denominator	21	21		
Native Hawaiian/Pacific Islander	*	*	*	Not Rated
Native Hawaiian/Pacific Islander - Denominator	*	*		
Underserved Race/Ethnicity	-83	-113	-30	Level 2
Underserved Race/Ethnicity - Denominator	25	35		
Asian	*	*	*	Not Rated
Asian - Denominator	*	*		
White	-28	-22	6	Level 5
White - Denominator	127	136		
Multi-racial	-107	-30	77	Not Rated
Multi-racial - Denominator	10	13		

## Mathematics Participation Details

**District:** Oregon Department of Education

**School:** The Ivy School

All students in tested grades and enrolled on the first school day in May must take a statewide assessment. The data table displays the percentage of students who took a statewide assessment by school year and student group. Student groups are assigned a rating based on the three-year average. 'Not Rated' means the student group did not meet minimum n-size of 20 to receive a rating. Note that the Students Experiencing Poverty student group replaced the formerly used Economically Disadvantaged student group.

### Participation Target: 94.5%

Student Group	2021-22	2022-23	2023-24	3-year Average	Status
All Students - Percent	89.6	94.0	97.4	93.7	Not Met
All Students - Denominator	182	182	194	558	
Students Experiencing Poverty - Percent	93.3	87.9	93.9	91.7	Not Met
Students Experiencing Poverty - Denominator	30	33	33	96	
English Learners - Percent	50.0	100.0	*	66.7	Not Rated
English Learners - Denominator	2	1	*	3	
Students with Disabilities - Percent	82.9	89.2	93.3	88.6	Not Met
Students with Disabilities - Denominator	41	37	45	123	
American Indian/Alaska Native - Percent	100.0	100.0	100.0	100.0	Not Rated
American Indian/Alaska Native - Denominator	1	2	1	4	
Black/African American - Percent	93.3	78.6	86.7	86.4	Not Met
Black/African American - Denominator	15	14	15	44	
Hispanic/Latino - Percent	87.5	100.0	100.0	95.4	Met
Hispanic/Latino - Denominator	24	20	21	65	
Native Hawaiian/Pacific Islander - Percent	*	*	*	*	Not Rated
Native Hawaiian/Pacific Islander - Denominator	*	*	*	*	
Underserved Race/Ethnicity - Percent	90.0	91.7	94.6	92.0	Not Met
Underserved Race/Ethnicity - Denominator	40	36	37	113	
Asian - Percent	100.0	100.0	100.0	100.0	Not Rated
Asian - Denominator	2	5	4	11	
White - Percent	90.5	94.7	97.9	94.5	Met
White - Denominator	126	131	140	397	
Multi-racial - Percent	78.6	90.0	100.0	89.2	Not Met
Multi-racial - Denominator	14	10	13	37	

## Regular Attenders Details

**District:** Oregon Department of Education

**School:** The Ivy School

The Regular Attenders indicator displays the percentage of students attending for more than 90 percent of their enrolled school days, the denominator, and the corresponding rating for each student group. The data table shows three years of data and the three-year average. Student groups are assigned a rating based on the three-year average. '\*' means data was hidden to protect student confidentiality and 'Not Rated' refers to student groups that do not meet the minimum n-size of 20 to receive a rating. Note that the Students Experiencing Poverty student group replaced the formerly used Economically Disadvantaged student group.

Regular Attenders Level	Cut
Level 5	93
Level 4	89
Level 3	85
Level 2	52
Level 1	<52

### State Long Term Goal: 93%

Student Group	Grade Range	2021-22	2022-23	2023-24	3-year Average	Level
All Students - Percent	K-5	80.0	76.8	73.4	76.7	Level 2
All Students - Denominator		175	181	173	529	
Students Experiencing Poverty - Percent	K-5	56.5	61.3	56.5	58.4	Level 2
Students Experiencing Poverty - Denominator		23	31	23	77	
English Learners - Percent	K-5	*	*	*	*	Not Rated
English Learners - Denominator		*	*	*	*	
Students with Disabilities - Percent	K-5	77.3	71.0	73.3	73.5	Level 2
Students with Disabilities - Denominator		22	31	30	83	
American Indian/Alaska Native - Percent	K-5	*	*	*	*	Not Rated
American Indian/Alaska Native - Denominator		*	*	*	*	
Black/African American - Percent	K-5	63.6	63.6	45.5	57.6	Level 2
Black/African American - Denominator		11	11	11	33	
Hispanic/Latino - Percent	K-5	77.8	77.8	86.7	80.4	Level 2
Hispanic/Latino - Denominator		18	18	15	51	
Native Hawaiian/Pacific Islander - Percent	K-5	*	*	*	*	Not Rated
Native Hawaiian/Pacific Islander - Denominator		*	*	*	*	
Underserved Race/Ethnicity - Percent	K-5	73.3	73.3	70.4	72.4	Level 2
Underserved Race/Ethnicity - Denominator		30	30	27	87	
Asian - Percent	K-5	*	*	*	90.0	Not Rated
Asian - Denominator		*	*	*	*	
White - Percent	K-5	80.9	75.0	73.4	76.5	Level 2
White - Denominator		131	132	124	387	
Multi-racial - Percent	K-5	92.3	92.9	72.2	84.4	Level 2
Multi-racial - Denominator		13	14	18	45	

## On Track to English Language Proficiency (ELP) Details

**District:** Oregon Department of Education

**School:** The Ivy School

The On Track to English Language Proficiency (ELP) indicator displays the percentage of students who are on track to attain ELP, the denominator, and the corresponding rating for each student group. The data table shows three years of data and the three-year average.

Student groups are assigned a rating based on the three-year average. '\*' means data was hidden to protect student confidentiality and 'Not Rated' refers to student groups that do not meet the minimum n-size of 20 to receive a rating.

On Track to ELP Level	Cut
Level 5	80
Level 4	68
Level 3	56
Level 2	22
Level 1	<22

### State Long Term Goal: 80%

Student Group	2021-22	2022-23	2023-24	3-year Average	Level
Current English Learners - Percent	*	*	*	*	Not Rated
Current English Learners - Denominator	*	*	*	*	

# Oregon State Board of Education

March 13, 2025

AGENDA ITEM: 7.A.

<p><b>SUBJECT:</b> The Ivy School Charter Renewal (State Board Sponsored) <b>STAFF NAME &amp; OFFICE:</b> Christen Kelly, Charter School Specialist; Kate Pattison, SCORE Team Director; Nikki Jones, Executive Director, The Ivy School</p> <p>The Board must evaluate and decide whether to renew The Ivy School for a ten-year charter term.</p>	<p><input checked="" type="checkbox"/> <b>First Reading</b> <input checked="" type="checkbox"/> <b>Presentation</b> <input type="checkbox"/> <b>No Presentation</b></p> <p><input type="checkbox"/> <b>Action</b> <input type="checkbox"/> <b>Presentation</b> <input type="checkbox"/> <b>No Presentation</b></p>
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## BACKGROUND

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The Ivy School is one of four Oregon State Board of Education sponsored public charter schools. Approved for sponsorship in December 2008, The Ivy School first opened in September 2009 and the school is currently in its fifteenth year of operation. The Ivy School is located in the Portland Public School District and serves 266 students in grades K-8. The Ivy School’s mission is to offer a Montessori education to inspire students of diverse backgrounds to be lifelong, independent learners who value responsibility and embody peace. Students are engaged through hands-on Montessori materials and student-driven work cycles.

The State Board of Education received an official written request from The Ivy School for renewal of the charter contract pursuant to ORS 338.065. This is The Ivy School’s third request to renew their charter contract. The school’s renewal request is for a ten-year charter contract.

On January 14, 2025, Department staff conducted a public hearing via Zoom for the Ivy School community to provide input regarding the renewal. Eleven people attended, including parents, staff, and Ivy School board members. Six provided spoken testimony at the meeting in favor of the renewal. The Oregon Department of Education (ODE) also received written testimony in favor of the renewal. (Please see the Public Hearing Officer’s Report and public hearing written testimony attached to this docket).

### **Renewal Process:**

Public charter schools must be renewed by their authorizing board to continue operating. The renewal process and criteria for evaluating the school’s performance is outlined in ORS 338. Over the last five years, ODE staff have visited the school and met with school leadership many times. The school received a formal visit each year and informal visits, including observations of the charter school board meetings and professional development for instructional staff. During the COVID-19 pandemic response, ODE conducted virtual visits and observations. As part of the ongoing oversight and accountability, the school has participated in formal visits, required training, and submitted reports to ODE. The information gathered from the visits and reports presented in three categories (academic performance,

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organizational performance, and fiscal performance) serves as the foundation for staff recommendation regarding the renewal of this school. The specific performance expectations for each category are mutually agreed upon in the Performance Framework and included in the charter contract.

The Ivy School completed a renewal application and submitted it along with the formal request for renewal on December 31, 2024. The application includes an overview of the school's prior academic, operational and financial performance, as well as a description of what the school intends to accomplish over the next ten years. This renewal application and appendices are included as an attachment.

### ***Academic:***

The Ivy School has generally performed well academically. When measuring the school's performance on the English Language Arts standards in the state assessment, the school has either met or exceeded the expectations included in the Performance Framework. In 2023-24, the school did not meet 3 year growth expectations in Math for identified student groups, however it met overall Math growth for all students. The school is actively working on implementing math supports for students using Montessori materials and tracking students' progress with iReady assessments several times a year. This informs targeted interventions for students as needed.

In March 2020, The Ivy School quickly pivoted to distance learning and was able to start providing instruction to students after spring break. For distance learning, staff ensured that each student had access to a chromebook or other device. Teachers began meeting with students in 1-on-1 conferences to establish virtual relationships and assess student needs. Teachers quickly rolled out lessons through iReady and then began developing their own Montessori video lessons and follow-up work packets for students. The Ivy School met the requirements of Distance Learning for All and eventually brought students back on campus through Limited In-Person Instructional opportunities.

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

In 2020-21, the Department conducted a virtual site visit and observed instruction within CDL and school systems adapted to support students online. Then in 2021-22, the Department was able to visit the school in-person and conducted a hybrid site visit with some focus groups meeting virtually. In 2022-23, the site visit returned to full in-person focus groups and observations. Over this period, ODE has observed the school prioritize academic rigor and teacher development. This focus has been necessary as part of the pandemic response in addition to further strengthening the Montessori educational program. Through these efforts, school leadership has made strategic investments to grow their own staff, training and promoting assistant guides to classroom guides (teachers).

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Over 2023-24 and 2024-25, Ivy has continued to focus on fidelity to the Montessori curriculum and educational program. The school has strengthened its tiered interventions and works closely with the special education team at PPS to identify students who need additional support. Teachers are working closely with leadership to evaluate the math program to address areas where students need different lessons and support.

**Figure 1 – Ivy School Academic Performance Framework Ratings 2020-2024**

MEASURE		2020-21 Rating*	2021-22 Rating*	2022-23 Rating	2023-24 Rating
1c	Economically Disadvantaged/ Students Experiencing Poverty-ELA	No Rating	No Rating	Meets	Exceeds
1d	Economically Disadvantaged/ Students Experiencing Poverty -MATH	No Rating	No Rating	Meets	Meets
1g	Students with Disabilities-ELA	No Rating	No Rating	Exceeds	Meets
1h	Students with Disabilities-MATH	No Rating	No Rating	Meets	Meets
1i	Underserved-ELA	No Rating	No Rating	Meets	Exceeds
1j	Underserved-MATH	No Rating	No Rating	Meets	Does not Meet
2a	All Student Growth-ELA	No Rating	No Rating	No Rating	Exceeds
2b	All Student Growth-MATH	No Rating	No Rating	No Rating	Meets
3a	Growth: Economically Disadvantaged/ Students Experiencing Poverty ELA	No Rating	No Rating	No Rating	Meets
3b	Growth: Economically Disadvantaged/ Students Experiencing Poverty-MATH	No Rating	No Rating	No Rating	Falls far Below
3e	Growth: Students with Disabilities-ELA	No Rating	No Rating	No Rating	Meets
3f	Growth: Students with Disabilities-MATH	No Rating	No Rating	No Rating	Does not Meet
3g	Growth: Underserved-ELA	No Rating	No Rating	No Rating	Meets
3h	Growth: Underserved-MATH	No Rating	No Rating	No Rating	Falls far Below
4a	Alignment to CCSS	Meets	Meets	Meets	Meets

\*The state assessment system was waived for the 2020-22 school years because of the COVID-19 pandemic.

**Operational:**

The Ivy School has maintained strong compliance with all areas of operational performance expectations. A primary focus for the COVID years had been the health and safety of the Ivy School community and ensuring the school is compliant with the executive orders and pandemic guidance. Through regular meetings, phone calls, virtual oversight, and site visits, The Ivy School has demonstrated high levels of operational compliance.

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The Ivy School has made strategic investments in staff and empowered staff to pursue programs that are responsive to the school community. In 2023-24, the school established a full nutrition program where students receive breakfast, lunch, and snacks. The food is made on-site by a dedicated and involved program manager who incorporates food culture and traditions that mirror the diversity of the students, families, and neighborhood. In response to student interests and a lack of local options, two classroom assistant guides started a basketball team for Ivy students. Over the last five years, Ivy has continued its commitment to its mission as a Montessori school while also being responsive to the neighborhood where the campus is located and the students enrolled. This has been evidenced by classroom materials, school events, as well as student and staff demographics.

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

**Figure 2 – The Ivy School Operational Performance Framework Ratings 2020-2024**

MEASURE		2020-21 Rating	2021-22 Rating	2022-23 Rating	2023-24 Rating
10a	Education Program Implementation	Meets	Meets	Meets	Meets
10b	Education Requirement Compliance	Meets	Meets	Meets	Meets
10c	Rights of Students with Disabilities	Meets	Meets	Meets	Meets
10d	Rights of ELL	Meets	Meets	Meets	Meets
11a	Governance Compliance	Meets	Meets	Meets	Meets
11b	Administration Accountability	Meets	Meets	Meets	Meets
11c	Reporting Requirement Compliance	Meets	Meets	Meets	Meets
12a	Rights of All Students	Meets	Meets	Meets	Meets
12b	Staff Credentialing Requirements	Meets	Meets	Meets	Meets
13a	Facilities and Transportation Requirements	Meets	Meets	Meets	Meets
13b	Health and Safety Requirements	Meets	Meets	Meets	Meets
13c	Student Information	Meets	Meets	Meets	Meets
14a	Other Obligations	Meets	Meets	Meets	Meets

**Financial:**

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

The Department will continue to monitor financial management closely over the next term to see how the school is adhering to internal controls and managing decisions about the facility.

**Figure 3 – The Ivy School Financial Performance Framework Ratings 2020-2024**

MEASURE		2020-21 Rating	2021-22 Rating	2022-23 Rating	2023-24 Rating
7a	Current Ratio: Assets/Liabilities	Meets	Meets	Meets	Meets
7b	Unrestricted Cash	Meets	Meets	Meets	Meets
7d	Loan Default	Meets	Meets	Meets	Meets
8a	Total Margin (income /revenue)	Meets	Meets	Meets	Meets
8b	Aggregated Total Margin	Meets	Meets	Meets	Meets
8c	Debt to Asset Ratio	Meets	Meets	Meets	Meets
8d, 8e	Cash Flow	Meets	Meets	Meets	Meets
8g	Reporting and Compliance	Meets	Meets	Meets	Meets
8h	GAAP	Meets	Meets	Meets	Meets

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

**SUMMARY OF PREVIOUS BOARD ACTION**

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On April 16, 2020, the State Board of Education approved a five-year charter contract for The Ivy School.

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

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

**POLICY ISSUE OR CONCERNS**

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## Statutory Renewal Criteria Evaluation

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

The Ivy School has met the evaluation criteria in all categories.

Figure 4 – Statutory Renewal Criteria Evaluation

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

## Portland Public Schools

On February 6, 2025, Department staff sent a notice of the renewal recommendation and State Board meetings to the charter school program director for Portland Public Schools (PPS). The notice was acknowledged by PPS staff. No comments or concerns were raised by the district. The Department has not received any complaints or documented any concerns raised by PPS throughout the duration of the current contract.

## EQUITY IMPACT ANALYSIS

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The Ivy School is located in North Portland off Interstate Avenue. The school has served about 250 students in grades K-8 since 2009. Ivy’s mission is to offer a Montessori education to inspire students of diverse backgrounds to be lifelong, independent learners who value responsibility and embody peace. Ivy School students engage in a dynamic, authentic Montessori curriculum, which allows for exploration of the world around them. Through creative and challenging multi-sensorial instruction, Ivy School students develop critical thinking skills necessary to be global citizens in the 21st-century and beyond. Ivy Montessori teachers embrace best practices through Montessori philosophy and materials, state standards, authentic assessment, and student interest.

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In 2019, The Ivy School’s student population was 24% students of color and 76% white students. With the help of targeted investments, cultural shifts, and systemic adjustments, the school’s student population for the 2023-24 school year is 30% students of color and 70% white students.

When compared to PPS academically for the 2023-24 school year, Ivy School students perform at higher rates in 6 of the 8 categories. The school is working to improve math instruction and systems for intervention for underserved populations.

2023-24 Indicator	Ivy School Grades 3-8	PPS Grades 3-8	Framework Rating
<b>ELA - Achievement</b>			
• All Students	62.6	56.5	Not Rated
• Students Experiencing Poverty	34.4	23.8	Exceeds
• Special Education	41.9	33.2	Meets
• Underserved Race/Ethnicity	41.7	27.4	Exceeds
<b>MATH – Achievement</b>			
• All Students	32.8	49.1	Not Rated
• Students Experiencing Poverty	21.9	17.4	Meets
• Special Education	37.2	29.9	Meets
• Underserved Race/Ethnicity	11.4	20.7	Does not Meet

## FISCAL ANALYSIS

A decision to not renew The Ivy School would result in a loss of \$285,000 a biennium. This is equivalent to about 29% of the funds the Department receives from the state sponsored charter schools that are used to fund all charter school staff and programs at ODE.

## EFFECT OF A “YES” OR “NO” VOTE

“Yes” = The Ivy School will be allowed to operate for another 10 years so long as it operates according to the law and any specific requirements or target negotiated in a new contract.

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

## STAFF RECOMMENDATION

Approve  Approve next month  No recommendation at this time

# Oregon State Board of Education

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## **ATTACHMENTS**

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Attachment 1: The Ivy School Renewal Application

Attachment 2: The Ivy School Renewal Application Appendices

Attachment 3: The Ivy School Performance Framework 2023-24

Attachment 4: The Ivy School Public Hearing Officer Report

Attachment 5: The Ivy School At-A-Glance Profile 2023-24

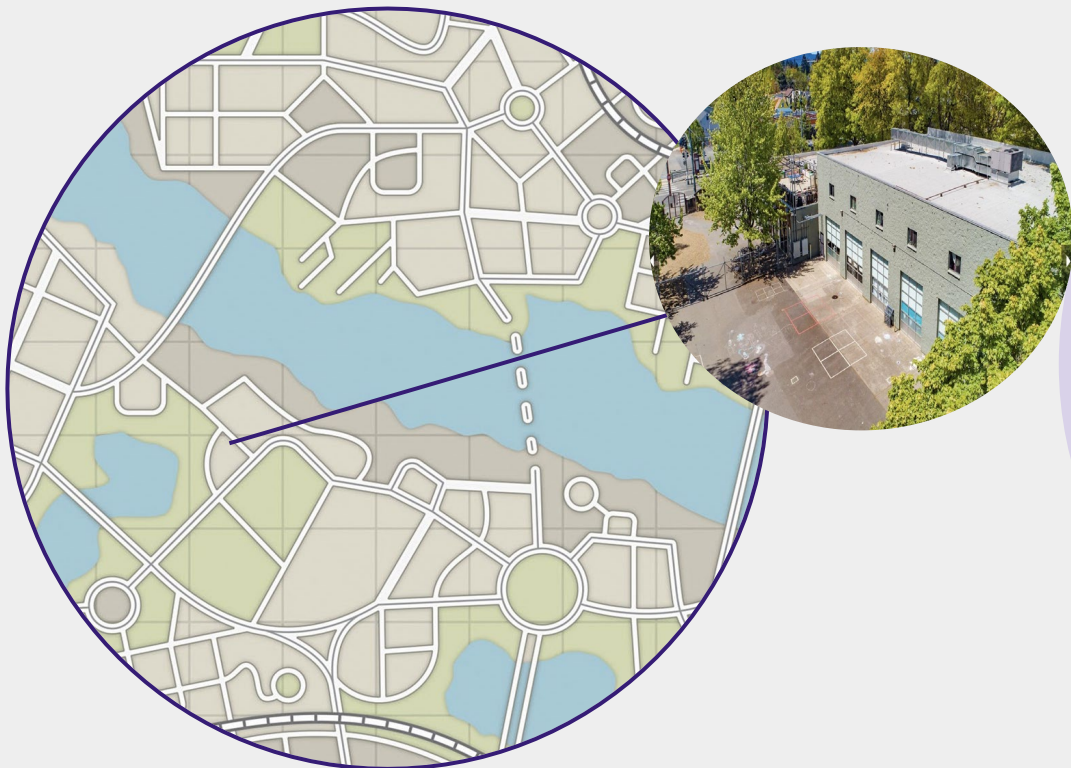
Attachment 6: The Ivy School Accountability Details 2023-24

# THE IVY SCHOOL CHARTER RENEWAL

PRESENTED TO THE OREGON STATE SCHOOL BOARD

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# WHERE ARE WE?



5420 N INTERSTATE

<https://www.theivyschool.org><sup>187</sup>

# SCHOOL OVERVIEW



The Ivy School is a tuition-free public charter school serving K-8 students. Our mission is to provide an equitable Montessori education, fostering academic, social, and emotional growth for all students.

- **Equitable Montessori Education:** The Ivy School ensures all students, regardless of background, have access to high-quality Montessori materials, multi-age classrooms, and individualized learning plans that support their unique growth.
- **High Quality Education** Students engage in hands-on, self-directed learning experiences that promote critical thinking, problem-solving, and a deep understanding of core subjects.<sup>188</sup>
- **Social and Emotional Development:** We incorporate Positive Discipline and restorative justice practices to nurture a sense of community, self-awareness, and conflict resolution skills.
- **Inclusive and Diverse Environment:** The Ivy School values diversity and inclusion by fostering a welcoming environment where students learn from different perspectives and develop cultural competence.



# EARLY ELEMENTARY

- Four (1,2,3) Multi-Age Classrooms
- One Teacher & One Assistant
- Concrete Hands-On Materials
- All Learning Materials Accessible to Students on Shelves that Increase in Difficulty
- Many Materials Self-Checking
- Freedom with Responsibility
- Small Group & One on One Lessons

# MOVEABLE ALPHABET

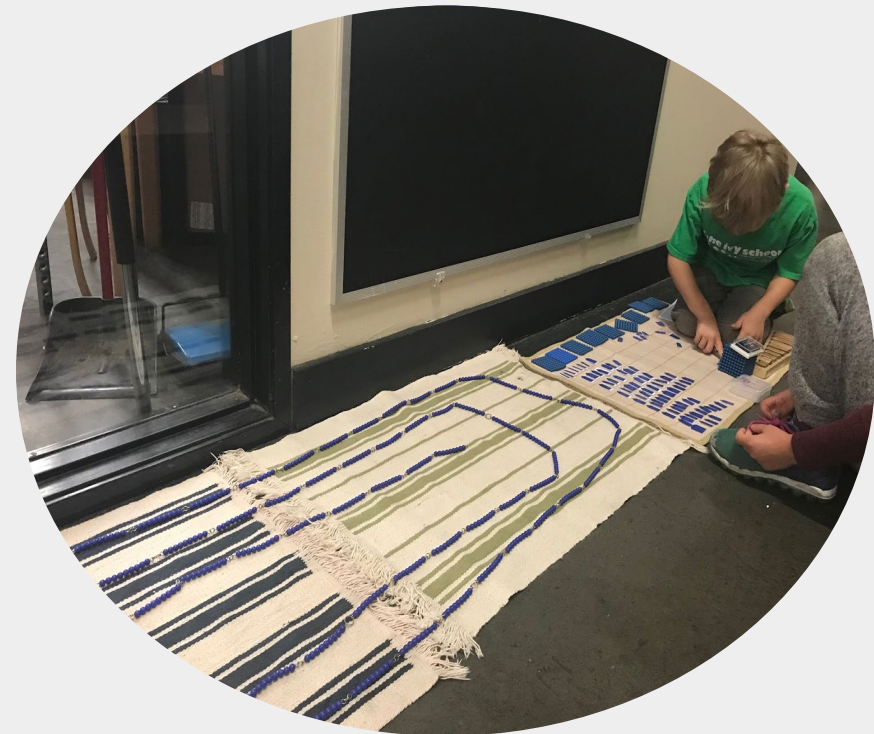


**Building Pre-Writing & Spelling Skills:** The Moveable Alphabet allows children to construct words and sentences before they have the fine motor skills to write, supporting early literacy development.

**Phonetic Exploration:** Children use the letters to sound out words, reinforcing phonics, letter-sound relationships, and spelling patterns in a hands-on, engaging way.

**Encouraging Creative Expression:** It provides a tool for children to go express thoughts, create stories, and explore language structure, fostering confidence and a love for writing.

# Bead Chains



**Hands-On Math Manipulatives: Bead Bars** are colorful, tactile materials used by our students to help them visualize and internalize mathematical concepts, particularly in counting, addition, subtraction, multiplication, and division.

**Understanding Quantity & Place Value:** By working with bead bars of different lengths and colors, students develop a concrete understanding of numbers, numerical relationships, and the decimal system.

**Foundation for Advanced Math:** Bead bars help bridge the gap 191 between concrete and abstract math, preparing students for more complex operations like squaring, cubing, and working with large numbers.



# UPPER ELEMENTARY

- Four Upper Elementary Multi-Age (4,5,6) Classrooms
- One Teacher/One Assistant in Each Classroom
- Advanced Hands-On Montessori Materials for Abstract Thinking
- Student-Driven Research & Independent Work Choices
- Emphasis on Collaboration, Leadership, and Critical Thinking
- Outdoor Education & Going Out Experiences

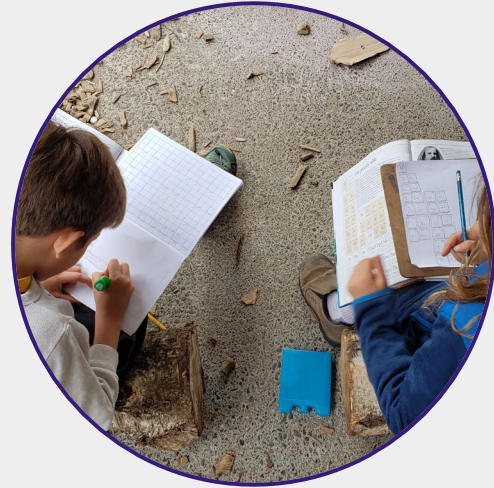
# Upper Elementary 4,5,6



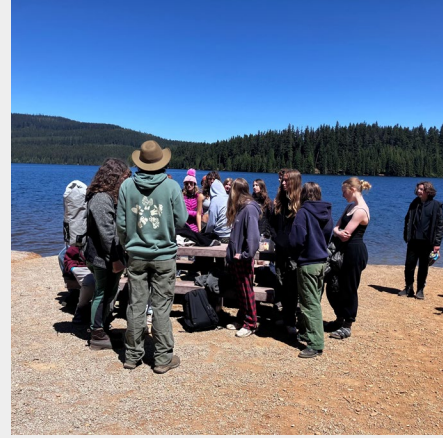
**Going Outs**



**Group Work**



**Nature as The Prepared  
Environment**



# Middle School

- Middle School Multi-Age Classrooms
- Combination of Montessori and Traditional Hourly Schedule
- Socratic Discussions & Paideia Seminar for Critical Thinking
- Project-Based Learning & Real-World Applications
- Emphasis on Independence, Self-Management, and Leadership
- Integrated Humanities, Science, and Math Curriculum
- Outdoor Education & Community Service Opportunities



# Paideia Seminar

- Student-Led Socratic Discussions on Complex Texts
- Focus on Critical Thinking, Deep Inquiry, and Active Listening
- Emphasis on Respectful Dialogue & Multiple Perspectives
- Text-Based Questions Encourage Thoughtful Analysis
- Builds Communication, Collaboration, and Leadership Skills



# Middle School Lab Class

Lab Class is a hands-on elective designed to equip students with essential **practical life skills** that prepare them for success beyond the classroom. Students engage in activities such as:

- **Public Speaking & Presentations** – Learning how to confidently present ideas, engage an audience, and communicate effectively.
- **Job Readiness** – Practicing how to fill out job applications, write resumes, and develop interview skills.
- **Community Engagement** – Organizing and participating in **community cleanups, service projects, and school improvement initiatives** that foster leadership and responsibility.
- **Problem-Solving & Critical Thinking** – Working through real-world scenarios that encourage independence, teamwork, and creative problem-solving.

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This class helps students build confidence and gain valuable skills they can use in their future academic, professional, and personal

# Micro-Business Class



Micro-Business Class is a dynamic, student-led elective that teaches entrepreneurship and financial literacy through hands-on experience. Students take ownership of real-world business operations by:

- **Organizing and Running School Events** – Planning, managing logistics, and executing school-wide fundraisers, celebrations, and activities.
- **Manufacturing & Selling Goods** – Creating handmade products or services, handling marketing, budgeting, and sales.
- **Financial & Business Management** – Learning how to budget, set pricing, track expenses, and make financial decisions to sustain their business ventures.
- **Team Collaboration & Leadership** – Working in teams to delegate tasks, manage operations, and problem-solve as they build their small businesses.

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This course empowers students with entrepreneurial skills, creativity, and financial responsibility while fostering teamwork and leadership in a real-world business setting.



# Partnerships at The Ivy School

At The Ivy School, many initiatives and partnerships are student-led, evolving based on individual, grade-level, and community interests and needs.

## Building-Led Partnerships:

- **Architecture in Schools (4th–6th Grade)** – Hands-on design and architecture experience.  
[Learn More](#)
- **Portland State University - Capstone Project/Philosophy Department (7th–8th Grade)** – Engaging in higher education research and discourse.
- **Outdoor School (6th Grade)** – Experiential learning in nature to deepen environmental understanding.
- **Civics Learning Project/Courthouse Tours (7th–8th Grade)** – Real-world civics education and legal system exposure.  
[Learn More](#)
- **Women in the Trades Annual Career Fair (7th–8th Grade)** – Exploring career paths in skilled trades.  
[Learn More](#)
- **Right Brain Initiative (K–8th Grade)** – Arts integration to enhance creativity and critical thinking.

# Food Security Initiative



- **Nutritious 'From Scratch' Lunch Program** – Provides freshly prepared, high-quality meals for all students at no cost, using ingredients sourced from local and minority-owned farms to support sustainable agriculture and equitable business practices. Convenient Grab-and-Go.
- **Breakfast Program** – Offers free, easily accessible breakfast options for all students, helping them start the day with energy and focus.
- **Funding & Community Support** – Sustained through strategic partnerships with the Oregon Department of Education (ODE) and grant funding, making it possible to offer free meals without financial burden on families.
- **Commitment to Food Equity** – Ensures that every student, regardless of background or income level, has access to nutritious meals, eliminating food insecurity as a barrier to learning.
- **Enhancing Student Well-Being & Performance** – Recognizing the link between nutrition and academic success, these meal programs support students' overall health, concentration, and engagement in the classroom.



# Facility Purchase = Stability

- Acquisition of School Building in 2018 – Secured a permanent facility to support long-term growth and stability.
- Establishing Roots in the Portland Metro Area – Provides a dedicated space for learning, ensuring consistency for students and families.
- Financial Sustainability – Predictable loan payments allow for responsible budgeting and long-term planning.
- Lower Facility Costs Over Time – Reducing rental expenses enables greater investment in educational programs, staff, and student resources.

# Whole School Community Effort



**Moving**

Teacher Support



**Remodel**

Parent Volunteers



**Green Space Improvement**

Students & Parents

# Playground Installation



Slides and Climbing  
Structures



Outdoor Classroom



Swing



# Equity Diversity and Inclusion

## The Ivy School Equity Code:

The Ivy School Community actively commits to anti-racist/anti-bias education to ensure all students reach their full potential.

We are here to help each other learn, grow and become safe, kind and responsible citizens: building community for each student, staff member and family. Although this list cannot be exhaustive, we explicitly honor diversity in ability, age, culture, ethnicity, family structure, gender identity or expression, language, national origin, political beliefs, profession, race, religion, sexual orientation and socioeconomic status. We do not tolerate discrimination.

Equity Code [Here](#)

# Equity Diversity and Inclusion

- **Significant Increase in Staff Diversity** – Grew the percentage of staff of color from **1% to 30%** over seven years, fostering a more inclusive and representative learning environment.
- **Commitment to Culturally Responsive Teaching** – Prioritizing instructional practices that honor diverse backgrounds, perspectives, and learning styles to create an equitable classroom experience.
- **Ongoing Training & Professional Development** – Implementing equity-driven **hiring, mentoring, and training initiatives** to support staff in delivering inclusive and culturally responsive education.
- **Celebrating Diversity through Cultural Events & Learning** – Hosting **multicultural events, heritage celebrations, and curriculum-integrated lessons** that honor diverse traditions, histories, and perspectives, fostering a deeper sense of belonging for all students and families.

# Cultural Celebrations



**Hispanic Heritage Month**

Día de los Muertos (Sugar Skulls)



**Black History Month**

Ghanaian Storytelling  
Experience



**United Nations Day**

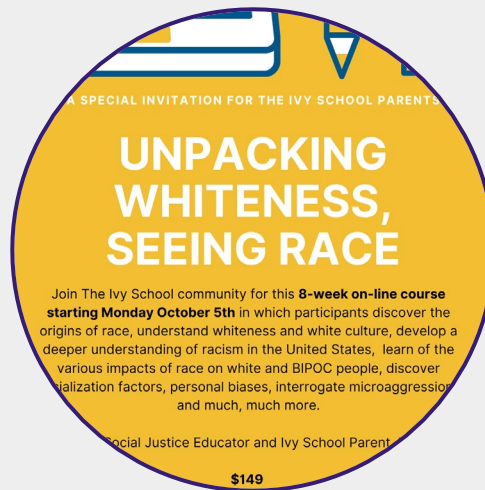
Classroom Presentations

# Family Community Events



## BH Community Event

Sunday Dinners



## Equity Education

Parent Education



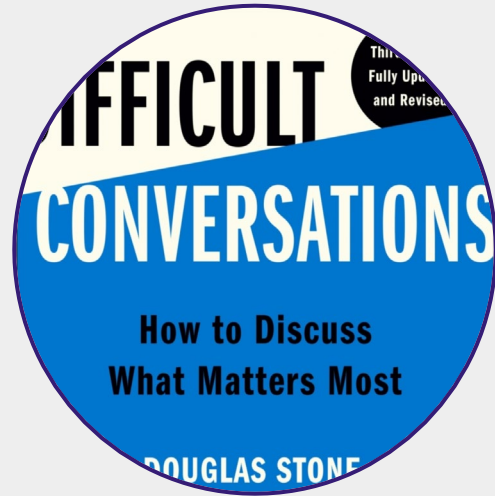
## Health and Wellbeing

Community Education

# Staff Professional Development



Restorative Practices Kelvin Oliver  
Staff Professional  
Development



Difficult Conversations  
Staff Professional  
Development

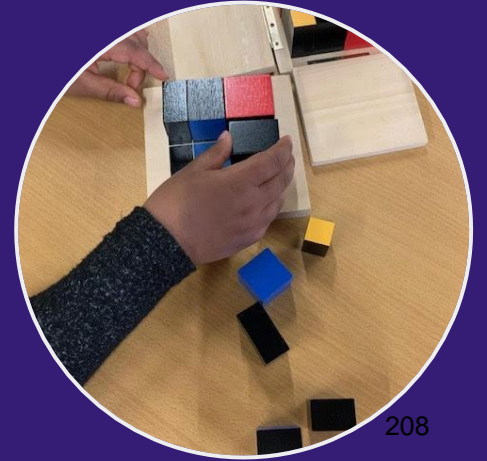


Embracing Equity  
Staff Professional  
Development



## Why Renew The Charter

- Proven Success in Montessori Education
- Sound Financial Stewardship
- Active Community Engagement
- Commitment to Equity & Inclusion
- Sustainable & Stable Leadership



# THE IVY SCHOOL CHARTER RENEWAL

The Ivy School is committed to excellence, equity, and student success. We seek the renewal of our charter to continue serving our students and community with high-quality Montessori education.



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