Application Guidance: *Early Literacy Success School District Grants*

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

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

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

Introduction

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

1. Increase early literacy for children from birth to third grade;
2. Reduce literacy academic disparities for student groups that have historically experienced academic disparities;
3. Increase support to parents and guardians to enable them to be partners in the development of their children's literacy skills and knowledge; and
4. Increase access to early literacy learning through support that is research-aligned, culturally responsive, student-centered and family-centered.
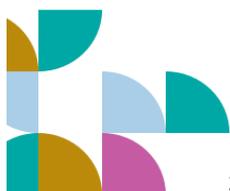
These goals will be accomplished through four programs: the Early Literacy Success School District Grants, the Early Literacy Success Community Grants, the Early Literacy Success Tribal Grants, and the Birth through Five Literacy Plan.

Early Literacy Success Tribal Grants

Early Literacy Success Community Grants

Early Literacy Success School District Grants

Birth through Five Literacy Plan

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

Roles and Authority for the Early Literacy Success School District Grants

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

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

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

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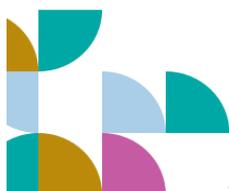
The overall requirements for the Early Literacy Success School District Grants are that applicants must:

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

---

[1] See Appendix A for the definitions of these important terms

[2] See Appendix A for the definitions of these important terms.

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

Document Purpose & Scope

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

Jumpstart Biennium (2023-2025)

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

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

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

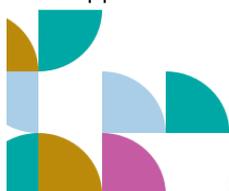[3] See Appendix A for the definition of this important term.

Aligning to Integrated Guidance

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

The Role of Oregon's Early Literacy Framework

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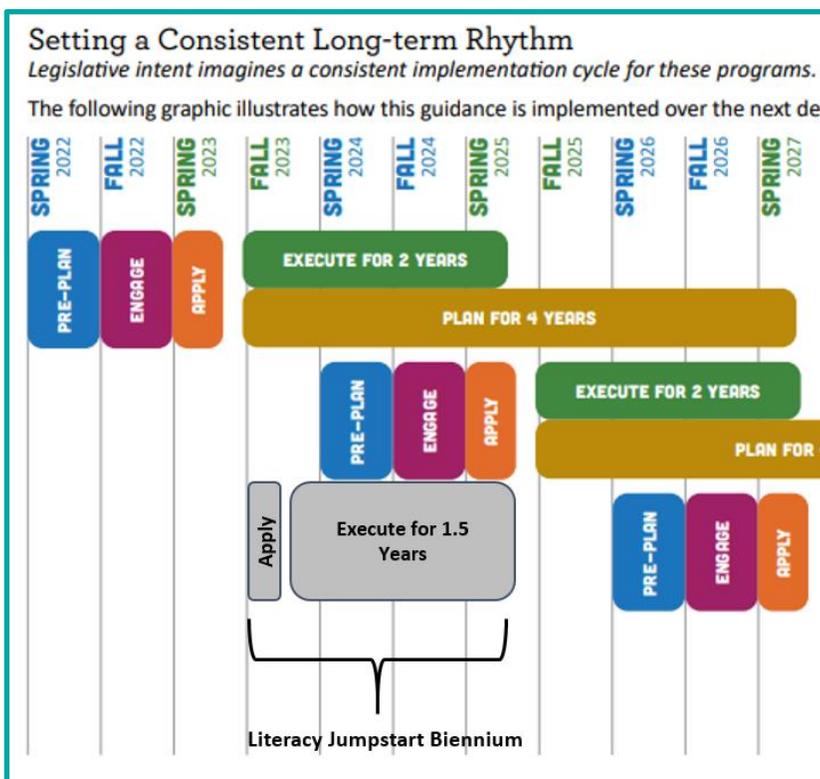
Definitions & Helpful Terms

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

Definitions

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

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

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

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

Helpful Terms

A a few of the additional terms for applicants include:

- "Early literacy program" should be considered as the entirety of the curriculum, assessments, instructional materials, practices, systems, staffing, and structures in place to support comprehensive early literacy across the district.
- "Professional development" for this grant can be considered similarly to its definition as articulated in the Oregon Department of Education's Integrated Guidance: *learning opportunities that support educators and administrators in instructional strategies for equity-centered, research-aligned, and culturally responsive literacy instruction that considers the context of each district, may elevate critical topics in system change strategies for early literacy, and support educators in leveraging high-quality, research-aligned instructional materials and curriculum to serve all students.*
- "Coaching" – Where this law names "coaching" it should be understood as an array of practices that support teachers through regular feedback and practice, formally or informally, to support implementation of research-aligned literacy practices and student learning.
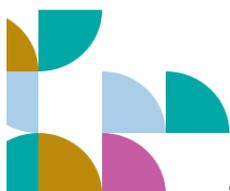
Where definitions have not yet been specified through permanent rule making, the Framework provides direction for activities and ideas relevant to the grant program. Definitions will also be clarified through the permanent rulemaking process for future applications.

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

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

Allowable Uses of Funding

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

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

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

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

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

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

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

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

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

---

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

Administrative Costs

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

Allowable Grade Levels

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

Funding

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

Eligibility

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

Consortia

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

Aligned Program Consortium members will:

---

[5] See Appendix A for the definition of this important term..

[6] As defined under Oregon Department of Education's Aligning for Student Success: Integrated Guidance for Six ODE Initiatives.

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

MOU

An amended Memorandum of Understanding (MOU) to include the Early Literacy Success School District Grants must be revised and signed by all eligible members[7] of the consortium to:
- define consortium operations as it relates to Early Literacy, and
- articulate the reporting structure as it relates to Early Literacy.

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

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

Collaboration

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

---

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

Allocations & Claims

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

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

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

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

Claim Window Year 1, 2023–2024	Amount of Claim
March 1 – March 31, 2024[9]	65% of allocation
April 1 – April 30, 2024	35% of allocation (up to 100%)

---

[8] A Universal Summer Extension was approved in temporary rules and anticipated in permanent rules.

[9] Claims may be made as soon as the grant agreement is fully executed.

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

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

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

Matching Funds

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

In Support of Small & Rural Districts

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

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

---

[10] Claims may be made as soon as the grant agreement is fully executed.

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

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

- **Limitation:** Up to 20% of a district's overall allocation can be spent on supporting 4th and 5th grades in the first year, and up to 10% in the second year. This allowance is only made for the Jumpstart Biennium (2023–2025).

- **Match:** Any funds up to the amounts named above must be matched. Similar to the overall 25% match, these match requirements can come from any fund source. The match requirement for 4th and/or 5th grade expenditures is the same as the limitation: 20% in 2023–2024 and 10% in 2024–2025.

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

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

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

---

[11] Grantees are not *required* to spend funds on 4th and 5th grade literacy.

[12] Grantees are not *required* to spend funds on 4th and 5th grade literacy.

Overview of the Application Process

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

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

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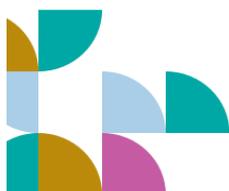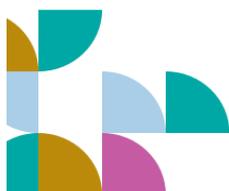
An Important Note about Tribal Consultation

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

Application Requirements

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

Required Components of Application	How Each Component is Submitted
1. A **Early Literacy Plan**, containing:	
○ Four-year goals (not applicable for the Jumpstart Biennium)	Not applicable this biennium
○ A review of the applicant's early literacy program	Program Review Tool (questions 1-8) that will be entered in the Application
○ A review of the applicant's early literacy curriculum	Inventory in the Literacy Inventory and Budget that will be uploaded into the Application

Required Components of Application	How Each Component is Submitted
○ A student growth assessment for all students, disaggregated by student groups that have historically experienced academic disparities.	Inventory in the Literacy Inventory and Budget that will be uploaded into the Application Student Growth Assessment question in the Application Planning Template and the Application
○ A description of how the applicant will provide professional development and coaching, extended learning programs, and high-dosage tutoring.	Professional Development and Coaching, Extended Learning Programs, and High-Dosage Tutoring questions in the Application Planning Template and the Application
2. An **Inventory** which must be accurate and up-to-date, including literacy assessments, tools, curricula and digital resources used to support literacy in the applicant's early elementary grades.	Inventory in the Literacy Inventory and Budget that will be uploaded into the Application
3. A **Communication Plan** for efforts to support engagement between school districts, elementary schools of the school district, families, and members of the school district community.	Communication Plan question in the Application Planning Template and the Application
4. Submission of board minutes as evidence that the Early Literacy Plan was **presented and approved by the applicant's school board** or governing body, at an open meeting, with opportunity for public comment (this cannot be a consent agenda item).	Board minutes uploaded into the Application Planning Template and the Application
Identification of **matching funds**, as described in later sections.	Matching Funds question in the Application

Three Important Points of Clarification

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

School Board or Governing Body Approval

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

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

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

Meaningful Reporting

Quarterly Reporting

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

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

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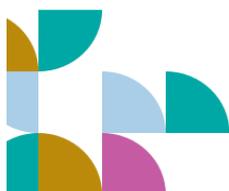
Annual Reporting

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

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

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

---

[13] The Oregon Department of Education plans to have grantees use the same Integrated Reporting Dashboard from the start of this initiative.

[14] Waived for the Jumpstart Biennium (2023-2025).

Prioritization

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

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

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

Detailed Application Planning Instructions

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

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

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

1. Program Review

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

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

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

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

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

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

2. Professional Development and Coaching

Item	Description
Application Item	Describe how you will provide professional development and coaching in research-aligned literacy strategies to teachers and administrators to improve early literacy instruction. Include how you will provide professional development to teachers and administrators on using and implementing literacy assessments, tools, curricula, and digital resources with fidelity to research-aligned literacy strategies. If you are not yet able to implement professional development and coaching, you must submit a rationale and describe how you plan to do so in the future.
Evaluation Criteria	The description of how the applicant will provide professional development and coaching in research-aligned strategies includes: • the research-aligned literacy strategies that the professional development and coaching will focus on (required); • the target audience (including roles) for the professional development and coaching (required); and • the literacy assessments, tools, curricula or digital resource(s) the professional development will focus on (as applicable). If the applicant is not yet able to implement professional development and coaching, applicants have submitted a rationale and description of how they plan to do so in the future.
Annual Reporting Requirement[15] (November 30th, 2024)	• Evidence that teachers and administrators are provided with professional development plans for using and implementing, with fidelity to research-aligned literacy strategies, the literacy assessments, tools, curricula, and digital resources in the inventory. • The number and percentage of teachers for early elementary grades receiving professional development and coaching disaggregated by grade level.

---

[15] See Part 1: Meaningful Reporting section for additional detail.

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

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

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

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

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

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

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

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

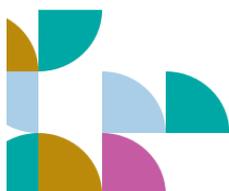[16] As described in the Every Student Succeeds Act.

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

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

3. Extended Learning Programs

Item	Description
Application Item	Describe how you will provide extended learning programs that use research-aligned literacy strategies and that are made available by licensed teachers or by qualified tutors. If you are not yet able to implement extended learning programs, you must submit a rationale and describe how you plan to do so in the future.
Evaluation Criteria	The description of how the applicant will provide extended learning programs that use research-aligned literacy strategies and that are made available by licensed teachers or by qualified tutors includes both: ● a description of how literacy is included as the focus of the program, and ● who will provide the extended learning and their qualifications ●

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

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

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

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

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

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

---

[17] See Part 1: Meaningful Reporting.

4. High-Dosage Tutoring

Item	Description
Application Item	Describe how you will provide high-dosage tutoring that integrates reading and writing and that is delivered by a qualified tutor using developmentally appropriate practices. If you are not yet able to implement high-dosage tutoring, you must submit a rationale and describe how you plan to do so in the future.
Evaluation Criteria	The description of how the applicant will provide high-dosage tutoring that integrates reading and writing and that is delivered by a qualified tutor using developmentally appropriate practices includes all four details: ● the domains of language[18] addressed (at least reading and writing); ● who will provide the high dosage tutoring and their qualifications; ● duration and frequency; and ● how the tutoring is developmentally appropriate, including how it is responsive to student need. If the applicant is not yet able to implement high-dosage tutoring, applicants have submitted a rationale and a description of how they plan to do so in the future.
Annual Reporting Requirement[19] (November 30th, 2024)	The number and percentage of students participating in high-dosage tutoring, with their outcomes disaggregated by student group and grade level.

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

---

[18] Reading, Writing, Speaking, and Listening.

[19] See Part 1: Meaningful Reporting.

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

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

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

Recommendation: Effective and impactful high-dosage tutoring programs:[20]
- have tutors that are well-trained and supported, or are teachers, retired teachers, or teaching candidates;
- have tutors that have time for planning and collaboration with classroom teachers;
- tutors use high-quality instructional materials in high-frequency sessions (offer tutoring at least three times per week, for 30 minutes per session) with three or fewer students in each session;
- align with an evidence-based curriculum;
- occur at school during the school day whenever possible;
- include instruction that is supplemental and focused on acceleration, not remediation;
- are built into the school day and engages teachers and caregivers; and
- use data to inform and individualize instruction and continuously improve program design.
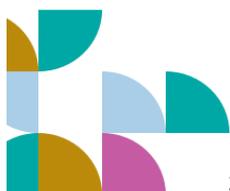
---

[20] https://www.edworkingpapers.com/ai20-267

5. Student Growth Assessment

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

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

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

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

6. Communication Plan

Item	Description
Application Items	What communication strategies will be used to communicate with: • other school districts? • elementary schools in the school district? • families of the school district? • members of the school district community?
Evaluation Criteria	At least one communication strategy for each community group is provided: • School districts; • Elementary schools of the school district; • Families of the school district; and • Members of the school district community

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

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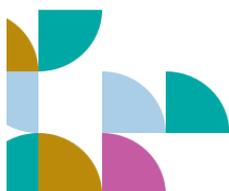
7. Matching Funds

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

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

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

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

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

8. Assurances

Item	Description
Evaluation Criteria	The applicant has verified all of the required assurances.

Early Literacy Success School District Grant - Specific Assurances

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

☐ Have reviewed their early literacy programs to identify areas of alignment with Oregon's Early Literacy Framework: A Strong Foundation for Readers and Writers (K-5) and the applicant's work will align with the definitions included in the Early Literacy Success Initiative*

☐ Have reviewed the reporting requirements in Section 6 (2) of the Early Literacy Success Initiative and included in the Early Literacy Success School District Grants Application Guidance. *

☐ Use literacy assessments, tools, curricula and digital resources that are reflected in the inventory and that they are based on research-aligned literacy strategies and are formative, diagnostic and culturally responsive; and if not, have indicated planned changes to ensure this requirement is met.*

☐ Will provide professional development and coaching in research-aligned literacy strategies to teachers and administrators in early elementary grades to improve early literacy instruction; and if not, have provided a rationale and description of how they will plan to do so in the future.*

☐ Will provide extended learning programs that use research-aligned literacy strategies to students in early elementary grades by licensed teachers or by qualified tutors; and if not, have provided a rationale and description of how they will plan to do so in the future.*

☐ Will provide high-dosage tutoring to students in early elementary grades that integrates reading and writing and that is delivered by a qualified tutor using developmentally appropriate practices; and if not, have provided a rationale and description of how they will plan to do so in the future.*

☐ Have a student growth assessment (or have described that they will obtain one) that produces data that can be disaggregated by student groups who have historically experienced academic disparities (as defined in the Early Literacy Success Initiative).*

Overarching Assurances

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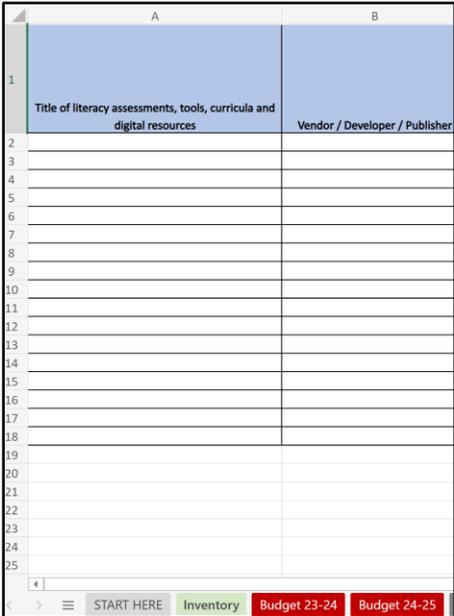
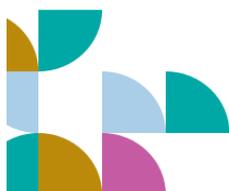# Detailed Literacy Inventory and Budget Instructions

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

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

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

9. Inventory

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

---

[21] See Appendix A for the definition of these important terms.

Item	Description
Annual Reporting Requirement[22] (November 30th, 2024)	- Inventory of literacy assessments, tools, curricula and digital resources used by the school district or charter to support literacy. - Evidence that the literacy assessments, tools, curricula, and digital resources are used with fidelity to research-aligned literacy strategies. - Curricula being used by the school district or public charter school.

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

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

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

Research-Aligned Materials

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

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

---

[22] See Part 1: Meaningful Reporting.

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

Grades

Applicants must include materials used for:
- Grades kindergarten–3rd grade; and
- Pre-kindergarten, 4th grade, and 5th grade, if applicable.

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

Scope of Inventory

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

- **Literacy curriculum** – Any instructional materials used in practice and/or formally adopted by the local school board for core or basal instruction.

- **Core or basal instructional materials** – Instructional materials that are intended to be a substantial and ongoing component of literacy instruction. These might include adaptive or personalized programs, digital, or print materials. Applicants are required to adopt basal instructional materials in order to teach the academic content standards for English Language Arts.

- **Literacy Tools and Digital Resources** – Any supplemental materials, devices, programs, or curriculum used as either core or supplemental to students' literacy instruction. This includes intervention, acceleration, tutoring, or supplemental materials that are used to a substantial degree across elementary schools in student literacy instruction and in addition to the core curriculum.

- **Literacy Assessments** – Summative, benchmark, diagnostic, interim assessments, and purchased systems of formative assessment practices used to measure student learning across any or all of the four domains of literacy. For definitions, see pages 26–35 of [The Right Assessment for the Right Purpose](#).
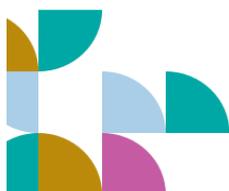
Date of Adoption

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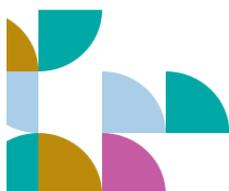
Plans for Updating

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

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

10. Budget 23-24/24-25

Item	Description
Evaluation Criteria	Two years of budget tabs are complete. No more than 20% of the 23-24 budget is allocated to 4th and/or 5th grade, if applicable. No more than 10% of the 24-25 budget is allocated to 4th and/or 5th grade, if applicable. Proposed investment descriptions align with the associated allowable use category selected. Any FTE type submitted is one of: - Literacy specialist - Interventionist - Coach No more than 5% of total allocation is budgeted for administrative (or

![Oregon Department of Education logo]
OREGON
DEPARTMENT OF EDUCATION
Oregon achieves . . . together!

Item	Description
	indirect) costs.
	For each budget tab, the total budgeted amount does not exceed the total allocation.

	Each activity on both budget tabs:
	   - Connects to an allowable use
	   - Has a description of the Proposed Investment
	   - Specifies:
	      - FTE, if applicable
	      - FTE Type, if applicable
	      - Appropriate allowable use code
	      - 4th/5th Expenditure, if applicable
	      - A budget amount

	Any proposed changes indicated in the Inventory are reflected in the budget, if applicable.
	  a) This is not applicable if:
	     i) The applicant description names a different funding source to address the change
	     ii) There are no proposed changes.

Quarterly Reporting Requirement[23]	Provide actual expenditures and plan changes, as necessary.

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

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

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

---

[23] See Part 1: Meaningful Reporting.

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

All expenditures must be aligned to the allowable uses in Section 3 of the Early Literacy Success Initiative.

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

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

School Year	Limitation
2023–2024[24]	20% Limitation
2024–2025[25]	10% Limitation

Application Item	Grant Allowable Use Category

From the drop-down menu, select the Grant Allowable Use Category that most closely aligns with the investment. Your options are:
● Professional Development & Coaching
● Extended Learning Programs
● High-Dosage Tutoring
● Purchasing Curricula & Materials
● Hiring

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

---

[24] Applicants are not *required* to spend funds on 4th and 5th grade literacy.

[25] Applicants are not *required* to spend funds on 4th and 5th grade literacy.

Purchasing Curricula & Materials

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

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

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

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

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

Hiring: Employment of Literacy Specialists, Interventionists, and Coaches

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

Application Item	Proposed Investments

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

Application Item	FTE & FTE Type

If there is FTE associated with the investment, indicate how much FTE and the Type of FTE from the dropdown that most closely aligns to the investment.

Application Item	Allowable Use Code

Select the more granular allowable use code connected to the investment. Options for Allowable Use Code follow:

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

Application Item	Object Code

Select the appropriate object code connected to the investment.

Application Item	4th or 5th Grade Expenditure

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

Application Item	Literacy Budget

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

Application Item	Employment of Literacy Specialists, Interventionists, and Coaches

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

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

Definitions

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

- "Early elementary grades" means any grade from pre-kindergarten through grade three.

- "Elementary school" means a school of a school district, or a public charter school, with students in early elementary grades.

- "Extended learning programs" are programs that use research-aligned literacy strategies and that are made available to students in early elementary grades by licensed teachers or by qualified tutors. Extended learning programs may include, but are not limited to:
  - Home-based summer reading activities for students who need additional support and enrichment; and
  - An intensive summer school program for students who need the most additional support and who receive at least 60 hours of direct literacy instruction by an instructional assistant or a licensed teacher trained in research-aligned literacy strategies.

- "High-dosage tutoring" means one-on-one tutoring or tutoring in small groups, as determined by rule of the State Board of Education, that:
  - Is provided in addition to daily instruction;
  - Is provided two or more times each week over at least a 10-week period; and
  - Uses a research-aligned tutoring model that is administered in a culturally responsive manner and that is combined with the training necessary for tutors to implement the model effectively.

- "Pre-kindergarten" means a preschool or pre-kindergarten program that is:
  - Provided by a school district or public charter school; or
  - Delivered in partnership between a school district and another organization.

- "Preschool" means a high-quality program that serves children at least three years of age but not older than five years of age.

- "Public charter school" means a public charter school that: (a) Is established under ORS chapter 338; and (b) Is not a virtual public charter school, as defined in ORS 338.005.

- "Qualified tutor" means an individual who is trained to implement a program providing high-dosage tutoring.

- "Research-aligned literacy strategies" means strategies that:
    - Are literacy focused;
    - Are culturally responsive and relevant to diverse learners; (c) Are based on long-term research derived from the science of reading and writing; and (d) Apply instructional practices that are developmentally appropriate and specifically designed for students with disabilities and students who are English language learners.

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

- "Student groups that have historically experienced academic disparities" means:
    - Economically disadvantaged students, as determined under rules adopted by the State Board of Education;
    - Students from racial or ethnic groups that have historically experienced academic disparities, as determined under rules adopted by the State Board of Education;
    - Students with disabilities;
    - Students who are English language learners;
    - Students who are foster children, as defined in ORS 30.297; (f) Students who are homeless, as determined under rules adopted by the State Board of Education;
    - Students who attend an elementary school that:
        - Is identified for comprehensive support and improvement or for targeted support and improvement under the federal Every Student Succeeds Act (P.L. 114-95, 129 Stat. 1802); or
        - Qualifies for assistance under Title I of the federal Elementary and Secondary Education Act of 1965; or

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

Helpful Terms

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

- "Coaching" – Where this law names "coaching" it should be understood as an array of practices that support teachers through regular feedback and practice, formally or informally, to support implementation of research-aligned literacy practices and student learning.

- "Core or basal instructional materials" are instructional materials that are intended to be a substantial and ongoing component of literacy instruction. These might include adaptive or personalized programs, digital, or print materials. Applicants are required to adopt basal instructional materials in order to teach the academic content standards for English Language Arts.

- "Developmentally appropriate"[26]can be thought of as "an approach to teaching grounded in the research of how children develop and learn and in what is known about effective early education … developmentally appropriate practice involves teachers meeting young children where they are (by stage of development), both as individuals and as part of a group." The National Association for the Education of Young Children also identifies three core considerations of developmentally appropriate practice:
  - knowledge of child development and learning,
  - knowledge of children as individuals, and
  - knowledge of children's cultures.

- "Early literacy program" should be considered as the entirety of the curriculum, assessments, instructional materials, practices, systems, staffing, and structures in place to support comprehensive early literacy across the district.

- "Literacy Assessments" can be considered summative, benchmark, diagnostic, interim assessments, and purchased systems of formative assessment practices used to measure student learning across any or all of the four domains of literacy. For definitions, see pages 26–35 of The Right Assessment for the Right Purpose.

---

[26] Oregon's Early Learning & Kindergarten Guidelines

- "Literacy curriculum" can be considered any instructional materials used in practice and/or formally adopted by the local school board for core or basal instruction.

- "Literacy Tools and Digital Resources" can be considered any supplemental materials, devices, programs, or curriculum used as either core or supplemental to students' literacy instruction. This includes intervention, acceleration, tutoring, or supplemental materials that are used to a substantial degree across elementary schools in student literacy instruction and in addition to the core curriculum.

- "Professional development" for this grant can be considered similarly to its definition as articulated in the Oregon Department of Education's Integrated Guidance: learning opportunities that support educators and administrators in instructional strategies for equity-centered, research-aligned, and culturally responsive literacy instruction that considers the context of each district, may elevate critical topics in system change strategies for early literacy, and support educators in leveraging high-quality, research-aligned instructional materials and curriculum to serve all students.

Appendix B: Evaluation Criteria

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

Intake Checklist

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

Program Review

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

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

For All Applicants	Meets	Does Not Meet
The description of how the applicant will provide professional development and coaching in research-aligned strategies includes: • the research-aligned literacy strategies that the professional development and coaching will focus on (required); • the target audience (including roles) for the professional development and coaching (required); and • the literacy assessments, tools, curricula or digital resource(s) the professional development will focus on (as applicable). If the applicant is not yet able to implement professional development and coaching, applicants have submitted a rationale and description of how they plan to do so in the future.		
The description of how the applicant will provide extended learning programs that use research-aligned literacy strategies and that are made available by licensed teachers or by qualified tutors includes both: • a description of how literacy is included as the focus of the program, and • who will provide the extended learning and their qualifications. If the applicant is not yet able to implement extended learning programs, applicants have submitted a rationale and description of how they plan to do so in the future.		
The description of how the applicant will provide high-		

For All Applicants	Meets	Does Not Meet
dosage tutoring that integrates reading and writing and that is delivered by a qualified tutor using developmentally appropriate practices includes all four details: ● the domains of language[27] addressed (at least reading and writing); ● who will provide the high dosage tutoring and their qualifications; ● duration and frequency; and ● how the tutoring is developmentally appropriate, including how it is responsive to student need. If the applicant is not yet able to implement high-dosage tutoring, applicants have submitted a rationale and a description of how they plan to do so in the future.		

Student Growth Assessment

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

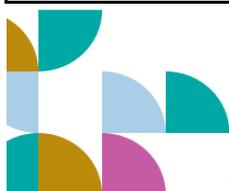[27] Reading, Writing, Speaking, and Listening.

Communication Plan

For All Applicants	Meets	Does Not Meet
At least one communication strategy for each community group is provided: • School districts; • Elementary schools of the school district; • Families of the school district; and • Members of the school district community		

Matching Funds

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

Inventory & Curriculum Review

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

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

Budget (Including Proposed Hiring and/or Content)

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

For All Applicants	Meets	Does Not Meet
associated allowable use category selected.		
No more than 5% of total allocation is budgeted for administrative (or indirect) costs.		
For each budget tab, the total budgeted amount does not exceed the total allocation.		

Each activity on both budget tabs:
  - Connects to an allowable use
  - Has a description of the Proposed Investment
  - Specifies:
    - FTE, if applicable
    - FTE Type, if applicable
    - Appropriate allowable use code
    - 4th/5th Expenditure, if applicable
    - A budget amount		

Any proposed changes indicated in the Inventory are reflected in the budget, if applicable.
    This is not applicable if:
    i) The applicant description names a different funding source to address the change
    ii) There are no proposed changes.		