Instructions for Completing Oregon Talented and Gifted District Education Plans

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Guide to Creating the District TAG Education Plan

Rationale and Requirements

Talented and Gifted (TAG) students are an important part of every school community across Oregon. Districts and schools must plan for how they will meet the academic and social-emotional needs of TAG students, specific to their local context, and communicate these plans to the students and families they serve. State level tools, such as this guidance document and its companion template, are intended to ease developing, reporting and sharing these plans.

District-level Talented and Gifted (TAG) Education Plans serve as an integral communication tool to district educators, families, and community partners. Districts are required to submit their TAG plans to the Oregon Department of Education (ODE) every three years, provide copies upon request to schools within their district, and post a copy on their district website. (OAR 581-022-2500 (2)(a)(A))

This document provides comprehensive guidance to help schools fulfill the requirements of Talented and Gifted Oregon Administrative Rules (OARs) 581-022-2325, 581-022-2330, and 581-022-2500. Requirements are noted by specific OAR citations and links in each section. Beyond the legal requirements, many components found in the TAG plan can enhance and elevate student learning experiences, equitable identification pathways, and family engagement.

Before You Get Started

Before starting this process, it is helpful to gather evidence of important TAG policies, procedures, and practices. Information contained in these documents will be helpful in developing and writing the district TAG plan.
- Local School Board TAG Policies
- Acceleration (subject and whole grade) policies, procedures, and forms
- Decision flow chart of TAG identification for elementary, middle, and high school
- All forms used in the identification process
- Examples of blank TAG Personal Educational Plans (PEPs)
- Examples of Instructional Plans for specific academic courses
- Contact Information (name, email address, and phone number) for key district TAG educators

File Format and Accessibility

All plans must meet accessibility requirements and be submitted to ODE by May 1, 2023, then on a three year cycle (i.e. May 1, 2026; May 1, 2029)

The template is available in Word and Google .docx. These two formats are designed to meet accessibility requirements. ODE recommends posting the plan on the district website as a PDF. This ensures both ease of access and accessibility for people experiencing disabilities.

Submission to ODE may be in Microsoft Word or PDF.

Organization of the District TAG Plan

Every district TAG plan shall include the six main sections outlined below and a glossary. Districts may add additional sections as needed.

Section 1: Introduction

To provide context that is consistent across districts, ODE developed a state-level introduction, including key terminology, which is pre-populated in the District TAG Plan Template. Please leave this section intact.

Section 2: School District Policy on the Education of Talented and Gifted Students

Legal references: aligned to ORS 343.397 (1)(a); ORS 343.409; and OAR 581-022-2500

A. Local School Board Policies

Provide a detailed list of local school board policies that govern gifted education in your district. *Note: School board policies in support of gifted education are usually in the IGB category.*

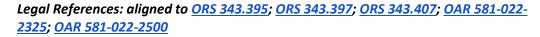### B. Implementation of Talented & Gifted Education Programs and Services

Describe how the district's education system addresses TAG students' intellectual and academic needs as learners at the elementary, middle, and high school levels. Include the following information:
- The district's mission and/or vision for providing an appropriate education to identified Talented and Gifted students
- A description of how teachers accommodate identified TAG students' assessed levels of learning and accelerated rates of learning *(required by OAR 581-022-2500(3)*
- A description of how classroom teachers and counselors assist TAG students to realize their contribution to themselves and to society *(aligned to ORS 343.395*)

Possible artifacts to include:
- District vision and mission statement
- Philosophy of Gifted Education
- Graduate Profile
- Instructional Frameworks or Models
- Curriculum Adoptions/Extensions
- Professional Learning Opportunities

Section 3: Identification of TAG-Eligible Students

Legal References: aligned to ORS 343.395; ORS 343.397; ORS 343.407; OAR 581-022-2325; OAR 581-022-2500

Describe the process for identification of TAG students in your district. Include the following information:

A. District TAG Identification Practices

1. Provide a procedural description of the identification process for the district. Include general practices that apply to all students, K-12, and specific identification protocols that may occur at designated ages and grade levels.
2. Include explanation and documentation of the following identification practices:
   A) Multiple modes and methods of data collection used in the identification process
   B) Culturally responsive practices specific to identification
   C) Research-based tools, instruments, or considerations utilized to equitably identify students from underrepresented populations including, but not limited to: students experiencing disabilities, students who are culturally and linguistically diverse
   D) Methods and practices that minimize or seek to eliminate the effects of bias in assessment and identification practices
   E) Universal Screening/Inclusive considerations (see guiding questions below)
   F) Assessment data, specifically addressing the use of national norms, local norms, or both in identification data collection
   G) Qualitative data (teacher, parent, and student checklists, observational data, portfolios, and classroom performance, etc.)
   H) A tool or method for determining a threshold of when preponderance of evidence is met
   I) TAG Eligibility Team - list position titles of those who serve on the eligibility team at the elementary, middle, and high school level
   J) Documents that are included in the students' cumulative record file regarding TAG identification and the eligibility teams' process to determine identification

B. Universal Screening/Inclusive Considerations

Include the answers to the following questions in your plan:
   A) Is a universal screening instrument used at a specific grade level? For example, all students at one grade level are screened for TAG eligibility using a common instrument.
   B) What is the broad screening instrument and at what grade level is it administered? (For example, *the CogAT is used at second grade, second semester for all second graders*)
   C) How is the screener used in the identification process (i.e. what percentile threshold, if any, is used to initiate the eligibility process? How are percentiles used to promote, rather than extinguish, eligibility?).

C. Portability of TAG Identification

Oregon does not have a state law or administrative rule on portability, which is the term used to describe the transfer of a TAG identification for a student from one district to another. It is a local district decision to determine policy and practice regarding portability of TAG identification.

Describe the policy or practice for handling TAG identification for students who transfer from another district or state. If helpful, use the following questions to guide the articulation of your district's policy or practice:

A) Does your district accept TAG identification from other districts in Oregon?
B) Does your district accept TAG identification from other states?
C) Do local norms influence the decision to honor identification from other districts and states? If yes, please explain how the district will address the identification of students identified as TAG using local norms from other districts or states.

Section 4: Instructional Services and Approaches

Legal Reference: aligned to [OAR 581-022-2500](#)

This section provides an assessment of current special programs and services provided by the school district for Talented and Gifted children. Include the following information:

A. Instructional Programs and Services for TAG students

In the table that is pre-populated on the template, provide a comprehensive list of instructional services that are provided to identified Talented and Gifted Students and are designed to meet their rate and level of learning at the elementary, middle, and high school levels.

The list needs to indicate the degree of implementation in all classrooms at every grade level within elementary and content areas for middle and high schools. For example, if the district indicates "differentiation" as an instructional service, it is imperative to communicate to families if differentiation is offered in every grade level or specific to certain grade levels or content areas. Families, community partners, and educators will use this information to shape their understanding of the programs and services provided to their students based on grade level and content area.

The following list represents examples of instructional strategies and services offered to Talented and Gifted students by the district and classroom teachers. Additional instructional strategies and services that are not on this list but are offered by the district should also be included in the table. Please see the glossary for definitions of the following strategies and services:

- Cluster Grouping
- Flexible Readiness Grouping
- Formative Assessment as a Process
- Differentiated Instruction involving tiers of depth and complexity
- Scaffolding or Tiered Instruction

- Subject acceleration
- Whole grade acceleration
- Advanced Placement (AP) with differentiation of instruction based on learning evidence
- International Baccalaureate(IB) with differentiation based on learning evidence
- Choice Assignments with depth and complexity
- Credit by Examination
- Curriculum Compacting
- Independent Learning Contracts
- Pull-Out Programs
- Option Schools

Example of completed table:

Instructional Programs and Services	Evidence and Explanation of Implementation: Grade Level and Content Area
Cluster Grouping	Schoolwide cluster grouping grades 1 - 5 (all elementary campuses)
Formative Assessment as a Process	Observed regularly in grades 3-5 (all classrooms, all elementary campuses)
Differentiated Instruction involving tiers of depth and complexity	6-8 (language arts and social science, and 9-12 (math, language arts, and science courses) all middle and high school campuses
Subject acceleration (above grade level coursework)	Determined by district subject acceleration policies (see attached policies)
Whole grade acceleration (grade skipping)	In accordance with district policy. The Iowa Acceleration Scale is the main tool used to determine whole grade acceleration (see attached policy)
Advanced Placement (AP) with differentiation of instruction based on learning evidence	See table below for list of courses offered
International Baccalaureate(IB) with differentiation based on learning evidence	See table below for list of courses offered
Option Schools	Students in grades 1 - 12 who scored at the 99th percentile (nationally normed) on the CogAT and OSAS (locally normed) are eligible to attend the program designated for TAG students housed in four neighborhood schools throughout the district

B. Advanced Placement Course Offerings

Advanced Placement (AP) courses are general education course offerings. However, AP classes in conjunction with differentiation practices may appropriately serve the rate and level needs of many TAG students. If your district does not offer AP courses, delete the table (but not the section header) and write in "Not applicable."

1. List the district's current Advanced Placement Class offerings available district-wide.
2. When an AP course is only offered at specific locations, please list the names of schools.

Example of Completed Table:

Name of AP Course	Schools and Grade Levels Offered (If certain courses are only offered at certain schools, please indicate the courses that are offered on each high school campus within the district)
Environmental Science	Open to students in grades 11 and 12, at all high school campuses
Literature	Open to students in grades 10, 11, and 12, at all high school campuses
Physics	Open to students in grades 11 and 12 at South HS campus only
Biology	Open to students in grades 10, 11, and 12 at all high school campuses

C. International Baccalaureate Offerings

International Baccalaureate (IB) courses are general education course offerings. However, IB classes in conjunction with differentiation practices may appropriately serve the rate and level needs of many TAG students.   If your district does not offer IB courses, delete the table (but not the section header) and write in "Not applicable."

1. List the district's International Baccalaureate class offerings available district-wide during the 2022-2023 school year.
2. When an IB course is only offered at specific locations, please list the names of schools, and grade levels offered.
3. Is an International Baccalaureate Diploma Programme (DP) available to students?

D. Teacher's Knowledge of Students in Class

Use the following questions to guide your responses.

1. What procedures are in place to ensure classroom teachers K – 12 know who the TAG identified students are in their classrooms?
2. What procedures are in place to ensure classroom teachers K – 12 know where they can get support if needed specific to the TAG services the district offers?
3. How do teachers determine rate and level needs for students in their classrooms?

E. Instructional Plans for TAG Students

Personal Education Plans (PEPs) are a common practice exercised by the district to communicate the programs and services TAG students receive throughout the school year. Personal Education Plans are for an individual student and are more common at the elementary level, whereas Instructional Plans (IPs) are more typically utilized at the secondary level. Instructional plans communicate how the teacher meets the needs of all TAG identified students in a particular course. Include answers to the following questions in the table provided in the template.

1. Are Personal Education Plans (PEPs) required or optional? At which grade levels are PEPs required?
2. Are Instructional Plans required or optional? Which courses are required to have Instructional Plans?
3. How are families notified regarding the opportunity to discuss the PEP or IP designed for their student's learning?

F. Option/Alternative Schools Designed for TAG Identified Students

If the district provides any alternative and/or choice schools for Talented and Gifted students, please include the following in the table provided in the template:
- Name(s) of the school(s)
- TAG qualifying criteria
- Number of students currently served
- Level of the population served, such as elementary, middle, or high school students.

Add rows to the table as needed for additional schools. If your district does not offer special schools/programs, delete the table (but not the section header) and write in "Not applicable."

G. TAG Enrichment Opportunities

List any optional TAG enrichment opportunities. This may include after-school enrichment programs such as academic competitions, academically-based clubs, and internships/mentorships for which TAG

students must apply or qualify. ***Note: After school opportunities do not replace daily TAG instruction and services.***

Add rows to the table as needed for additional schools. If your district does not offer special schools/programs, delete the table (but not the section header) and write in "Not applicable."

Section 5: Plan for Continuous Improvement

Legal references: *ORS 343.397(3) and OAR 581-022-2500*

Developing a comprehensive plan for how the district will strengthen its services for all TAG students, including Twice Exceptional (2e) students, involves setting goals, evaluating programs, family engagement, and professional learning for teachers. Regular professional learning opportunities designed for K-12 teachers, special education teachers, gifted education teachers, language development teachers, school counselors, and school administrators is imperative for fostering the growth of TAG learners and the continuous improvement of equitable TAG identification and services.

Include the following information in Section 5 (Professional Development and District Goals) of the TAG plan:

A. District Goals

Legal reference *ORS 343.397 (5) and OAR 581-022-2500*

Write three SMART goals (specific, measurable, achievable, relevant, and time-bound) for providing comprehensive special programs and services, K-12, for the 2022-2023 school year. The goals should address Talented and Gifted Education program improvement, including equitable identification practices, family engagement, and programs and services.

Note that you will update the goals for the 2023-2024 SY and the 2024-2025 SY, and those new goals should be based on the data and outcomes from the current year.

Topics to consider for goal development:
- Equitable TAG identification strategies
  - Local norms, aligning services to identification
  - Universal screening - how to use data beyond identification
  - ***Note: Student cohorts vary greatly. Please do not include a goal specific to increasing the number of students identified as TAG. The district cannot guarantee an increase of TAG qualified students.***
- Engagement with families (communication, outreach, input, advocacy, partnership)
- Programs and Services

- ○ TAG instructional strategies (rate and level, differentiation, acceleration, tiered assignments, student agency, Depth of Knowledge (DOK), formative assessment as a process, curriculum compacting, cluster grouping, etc.)
- ○ Pull-out programs
- ○ Schoolwide programs (cluster grouping, Kaplans's icons, alternative school settings, etc.)

Example Goals for the 2022-23 School Year

Goal Statement	What special programs or services will be provided to accomplish the goals?	Implementation Timeline	How will progress be measured?	How will success be measured?
Improve equitable identification practices by providing training of gifted characteristics to teachers, education specialists, and classroom support staff and incorporating the use of local norms at building levels, by the end of the 2022-23 school year.	Training in identification best practices, including use of local norms, as a means to services. Provide training specific to instructional practices that promote and foster academic growth for students identified as TAG	September 2022-TAG identification and services presentation at Back-to-School night. October 2022 - 1st of 3 trainings presented during principal-led staff meetings	Completion of three trainings with staff sign-in for accountability Revising district documents specific to identification to include use of local norms	Classroom observations and walkthrough protocols note examples of instructional practices observed Examine identification data (who was nominated and identified), and how that compares to the year prior

B. Professional Development Plan: Identification

Legal reference OAR 581-022-2325(2)(a)

Use the table provided to outline a professional development plan for those responsible for identification of students who are Talented and Gifted. This ensures OAR Division 22 compliance. *The first row of the table is required*; include information in the second and third rows if those types of training are offered.

Who	What	Provided by	When
Staff person who is responsible for TAG identification in your district [Provide staff name]	Required statewide training	Oregon Department of Education	[list date and location of training and type of training (in-person, Zoom, etc.)]
All district licensed educators who are responsible for identification	Training on Identification	[list roles/names of Professional Development providers]	[What month of each school year?]
Staff who have already been trained in previous years (include if offered)	OPTIONAL: Refresher Identification training		

C. Family Engagement

Legal references: OAR 581-022-2330 and OAR 581-022-2500 (1)(e)

Describe district procedures for communicating with families.
1. Does the district communicate with families in their home language?
2. What languages does the district routinely use translation services for to communicate with families?

When are families notified of the following topics:

Comprehensive TAG Programs and Services	Date and/or method of Communication
Identification procedures (including referral process)	
Universal Screening/Testing grade levels	

Comprehensive TAG Programs and Services	Date and/or method of Communication
Individual and/or group testing dates	
Explanation of TAG programs and services available to identified students	
Opportunities for families to provide input and discuss programs and services their student receives	
Explanation of the TAG learning plan (Personal Education Plans or Instructional Plans), if available	
TAG informational events (elementary) - where parents learn about TAG profiles, explanations of district and schools programs and services, etc.	
TAG informational events (middle school) - where parents learn about TAG profiles, explanations of services and programs offered to TAG identified students, transition expectations from elementary to middle school, etc.	
TAG informational events (high school) - where parents learn about TAG profiles, explanations of services and programs offered to TAG identified students, transition expectations from middle to high school, etc.	
Notification to parents of their option to request withdrawal of a student from TAG services	

Comprehensive TAG Programs and Services	Date and/or method of Communication
Notification of the right to file a complaint concerning TAG programs or services, beginning with district-level complaint process	
Designated district or building contact to provide district-level TAG plans to families upon request	

Section 6: Contact Information

Legal reference **ORS 343.397** *and* **OAR 581-022-2500**

In the table provided in the template, include the name and contact information (email address and phone number) for:

1. the district-level TAG coordinator/administrator
2. the person responsible for updating contact information annually on the district website
3. the person responsible for updating contact information annually with the Department
4. the person responsible for sending copies of the district-level TAG plans to building-level personnel (TAG coordinators, principals, etc.)
5. building-level TAG staff

Appendix: Glossary

The Department has included the following list of terms to assist with consistent use of language and understanding of practices. If your district would like to include additional terms, please include them on the glossary located on the template.

Term	Definition
Acceleration (subject)	Above grade-level standards and coursework. For example, a student who takes an advanced high school art class during middle school.

Term	Definition
Acceleration (whole-grade)	Grade skipping. For example, a student who moves from 1st grade to 3rd grade (skips the 2nd grade).
Acceleration (standards)	Working ahead on grade-level standards (considerations include: pacing needs and demonstrated levels of mastery on certain grade-level standards). This often occurs within the grade-level course.
Advanced Placement (AP)	College-level coursework with common nationally-normed assessments. AP coursework alone does not meet the needs of all TAG identified students. Differentiated instruction is often implemented to ensure growth and appropriate cognitive demand.
Choice Assignments	A selection of standards-based learning options/projects based on student interest and/or development that includes depth and complexity to address both motivation to learn and cognitive demand.
Cluster Grouping	TAG identified students are intentionally placed together into mixed ability classrooms. The structure of this educational practice allows students to have peer-alike time together to address both academic and social-emotional needs.
Credit by Examination	Students receive high school or college credit based on mastery of prior learning as measured through end of course examinations. District policies, assessment formats, and requirements may vary. Please check your local district policy.
Curriculum Compacting (sometimes referred to as Compacted Curriculum)	Honoring prior learning, typically measured through pre-assessments, by allowing students to skip lessons/standards where mastery has been met and providing opportunities to focus on standards in the current unit/curriculum that have not been mastered yet.
Depth and Complexity	A general framework to assess level of rigor specific to cognitive demand. Common frameworks include Webb's Depth Of Knowledge (DOK) and Bloom's Taxonomy.
Depth of Knowledge (DOK)	A framework developed by Dr. Norman Webb to assess the level of rigor for standards, projects, assignments, and exams.

Term	Definition
Differentiated Instruction (involving tiers of depth and complexity)	Instruction and learning options designed to reflect the needs of students specific to current learning evidence/data that fosters academic growth. Educators may differentiate content, process, product, and environment to accommodate needs of learning.
Flexible Readiness Grouping	A strategic strategy designed to group students according to best fit instructional needs and student discourse opportunities.
Formative Assessment as a Process	Intentional teaching and learning practices in the classroom used by both teachers and students. Moment-by-moment evidence of student learning and thinking is used to inform and adjust teaching and learning. Descriptive feedback, established success criteria, and clear learning goals are essential.
Independent Learning Contracts	An agreement between student and teacher that outlines individual learning opportunities and outcomes for the student. This strategy is commonly used when a student has demonstrated mastery of a unit that is currently being taught (i.e. student has already read the novel that is being taught in a particular grade level)
Instructional Plans (IPs)	Communicates instructional strategies and services of how the teacher meets the needs of *all* TAG identified students in a particular course. Typically utilized at the secondary level.
International Baccalaureate(IB)	College level coursework with common internationally-normed assessments. IB coursework alone does not meet the needs of all TAG identified students. Differentiated instruction is often implemented to ensure growth and appropriate cognitive demand.
Kaplan's Icons of Depth and Complexity	Icons/tools used to provide a visual prompt that promotes thinking from various perspectives, designed to achieve in-depth learning opportunities. Often used as a schoolwide program where all teachers, classroom support staff, and students are taught how to interact with and use the icons.
Level of Learning	In reference to OAR 581-022-2500(3): The instruction provided to identified students shall be designed to accommodate their assessed **levels of learning** and accelerated rates of learning

Term	Definition
	The student's instructional level in the curriculum and the place where the student will encounter knowledge and skills not yet learned or mastered. It is more than an advanced grade level. It involves depth and complexity in thinking.
Option Schools	Students choose to attend schools in their district with learning options that best fits their academic and affective needs. Some districts have alternative school options, magnet schools, and option programs (school within a school model) specifically designed for TAG students. Not all districts provide option schools or programs in Oregon.
Oregon Administrative Rule (OAR)	Rules adopted by the State Board of Education to support statutes (ORS)
Oregon Revised Statute (ORS)	Oregon laws passed by the State Legislature
Personal Education Plans (PEPs)	A plan developed by the teacher, TAG student, and family that outlines and communicates the programs and services received throughout the school year. Personal Education Plans are for an individual student and are more common at the elementary level.
Pull-Out Programs	Students attend specialized instruction designed for TAG students, during school hours, at the school where the student is enrolled. Pull-out programs vary by district. Not all districts offer pull-out programs.
Rate of Learning	In reference to OAR 581-022-2500(3): The instruction provided to identified students shall be designed to accommodate their assessed levels of learning and accelerated **rates of learning.** Addresses the measure of the pace at which the student is successfully progressing through the curriculum after being placed at the appropriate level. A student's rate will vary depending on subject, interest, level of difficulty and point in the learning process.
Scaffolding or Tiered Instruction	An instructional method that varies the level of learning (depth and complexity) of the assignment to provide all students an opportunity to engage in productive struggle and find success in academic growth.

How to Submit the Plan

1. Ensure that all bracketed instructions in the template are deleted.
2. Be sure to follow the file format and accessibility requirements noted in the section titled, "Guide to Creating the District TAG Education Plan."
3. Post on district website (PDF recommended). Consider the following:
    a. How easy is it to locate the report?
    b. Is it linked from the main page?
    c. Is it searchable?
    d. How is the report labeled/titled?
    e. Are there other languages that the report should be posted in?
4. Using the ODE Smartsheet form, upload your plan and verify that the plan is posted on your district's website by sharing the direct link to its location.
5. Celebrate!