



# STEM Investment Council

## AGENDA

February 1, 2019

9:00am – 12:00pm

Public Service Building, Third Floor, Room H301

255 Capitol Street

Salem, Oregon 97310

**Call/Video conference:** [https://hecc.adobeconnect.com/stem\\_council/](https://hecc.adobeconnect.com/stem_council/)

**Conference #:** 888-808-6929 **Participant Code:** 2135630

*Persons wishing to testify during the public comment period should sign up at the meeting. Times approximate and order of agenda items may vary.*

- JIM PIRO  
*Chair*
- CELESTE EDMAN
- HERB FRICKE
- RITA HANSEN
- ERIC MESLOW
- PAUL STEWART

*Ex-Officio members*

- MELISSA DUBOIS
- TODD NELL

*Staff*

- JULIA STEINBERGER,  
Director STEM Investment Council
- STEPHANIE SOLOMON,  
Program Support Specialist

<b>9:00</b>	<b>1.0</b>	<b>Introductions &amp; Welcome</b>	Chair Piro
<b>9:10</b>	<b>2.0</b>	<b>Consent Agenda</b>	Chair Piro
	2.1	<i>CONSENT ITEM: Approve November STEM Council Meeting Minutes</i>	
<b>9:15</b>	<b>3.0</b>	<b>Public Comment</b>	Chair Piro
		<i>Each individual/group will have a time limit of three minutes</i>	
	3.1	Invited testimony:	
<b>9:25</b>	<b>4.0</b>	<b>Update on Statewide Longitudinal Data System (SLDS)</b>	Ben Tate Chief Education Office
<b>9:35</b>	<b>5.0</b>	<b>STEM Innovation Grants</b>	Chair Piro
	4.1	Council Work Session	
<b>9:55</b>	<b>6.0</b>	<b>STEM Investment Council Legislative Report</b>	Julia Steinberger, Director, STEM Investment Council
<b>10:10</b>	<b>7.0</b>	<b>Discussion of STEM Education Plan</b>	Chair Piro
	7.1	Council Work Session	
<b>10:50</b>	<b>8.0</b>	<b>State-mandated Ethics Training</b>	Tammy Hedrick Oregon Government Ethics Commission
<b>11:50</b>	<b>9.0</b>	<b>Other Business and Next Steps</b>	All
<b>12:00</b>	<b>10.0</b>	<b>Adjourn</b>	



# Statewide Longitudinal Data System

STEM Council  
February 1, 2019

# Statewide Longitudinal Data System (SLDS)

**Issue:** Multiple systems under the leadership of the State of Oregon serve children, youth and adult Oregonians.

How do policymakers, agencies across the sectors of government, educational institutions, communities and the public more accurately evaluate the impact of practices, programs and policies across these systems on the academic achievement, educational attainment and workforce outcomes of Oregonians of all ages?

**Solution:** Develop a longitudinal data system that collects and maintains detailed, high-quality student-level data that are linked across entities and over time. Utilize longitudinal data for research to inform policy and resource allocation decisions.

# Background and History

- 2015:** Senate Bill 215 directs the Chief Education Office to develop an integrated, statewide data system that contains student-level outcomes from all public educational institutions
- 2016:** The Legislature approves funding for the SLDS IT Project in the 2016 Interim Session
- 2018:** SLDS IT Project completes in June; SLDS Director begins in October
- Current Status:** Transitioning from IT project to fully operational program that is accessible to researchers, policy makers and the public

# SLDS Program Launch

# Governance and Quality Assurance

## **Executive Committee**

- Consists of data partner agency directors and representation from OSCIO
- Cast the vision for the tool
- Set immediate and future goals for the system and the research conducted with the tool

## **Sub-Committees**

- Three subcommittees: Research, Data and Privacy
- Consist of subject matter experts from partner agencies and key external stakeholders
- Develop relevant processes
- Make operational decisions and recommendations on research requests, data sharing requests and access to the system

# Longitudinal Data and Research

## Initial Goals

- Strategic plan guiding further system development and longitudinal data and research
- Agencies and sectors partnering on shared research agenda
- Coordinated cross-agency review and prioritization of external, ad hoc research requests
- Continuous data sharing with focus on data quality and integrity
- Ongoing communication and outreach to key stakeholders

# System Utilization

- The SLDS is a complex research tool for analyzing data and looking for trends across multiple sectors over time
- Requires an analytic approach and skillset to use data to inform policy and practice
- SLDS itself does not provide analysis nor is it meant to produce static data points
- Researchers will drive use and further growth of the system

# Data Access: Staged approach

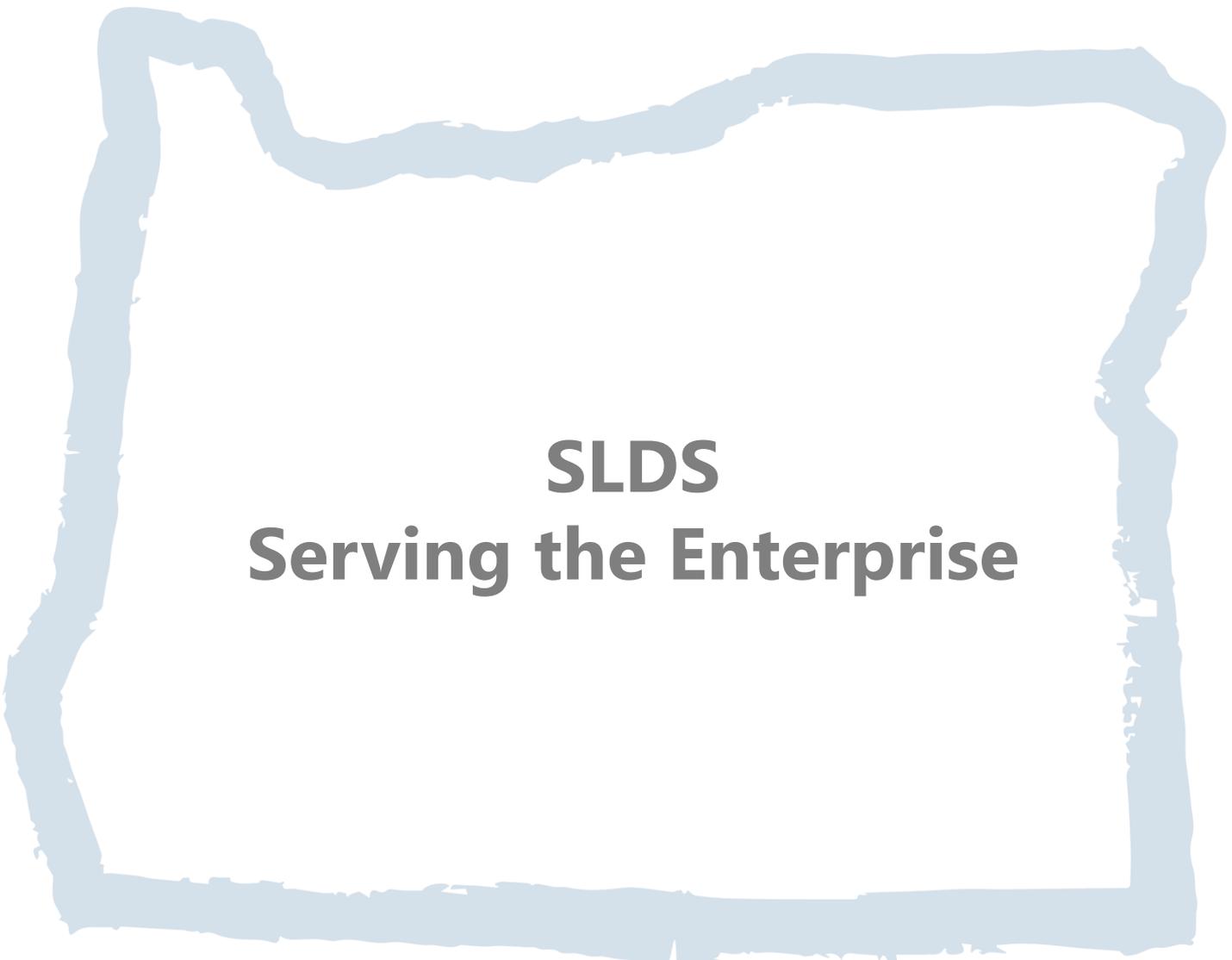
1. Data partner access: de-identified, aggregated data for ongoing state research
2. External researcher access: de-identified, aggregated data to support ad hoc research projects aligned with state research agenda
3. Public access: Ongoing data visualizations provided on public site (data is de-identified, aggregated *and* suppressed)

# Current Longitudinal Research

- Cross-agency research team is developing research agenda to guide the research conducted with the SLDS
- Current research questions being explored:
  - Who doesn't graduate from high school in four years and what path do they take?
  - What youth participate in high school re-engagement programs and what is their trajectory?

# Prospective Longitudinal Research Questions

- What services have students received prior to enrolling in K-12?
- What early childhood services are most effective for student outcomes? How are these services distributed across different racial/ethnic populations?
- Who is delaying college entry and why do these students not enter in the first fall after graduation?
- What are the characteristics of students who leave college without finishing and why are they leaving?
- What proportion of Oregon's high school and college graduates remain in the state to work?



**SLDS**  
**Serving the Enterprise**

# Prospective Data Partners

- National Student Clearing House (NSC)
- WICHE – Multi-State Longitudinal Data Exchange (MLDE)
- Teacher Standards and Practices Commission (TSPC)
- Department of Human Services (DHS)
- Oregon Health Authority (OHA)
- Department of Corrections (DOC)

# An Enterprise Tool

## **Transition of SLDS Technical and Research Functions**

- SLDS IT and research staff transition to State Chief Information Office under statutory sunset of Chief Education Office
- SLDS governed by cross-agency executive committee
- Transition aligns SLDS with broader enterprise coordination by new Chief Data Officer

# Key Points

- 1.) The SLDS is not in production yet (data has been received but not shared out of the system)
- 2.) All decisions related to how the system will be used and what will be published will be made by SLDS Governance (made up of data partner agencies)
- 3.) No data or reports will be published at this time (SLDS Governance will determine timeline for public access)
- 4.) Initial scope for the system is that it is a research tool for ODE, HECC and OED. Any changes to scope will be made by SLDS Governance



## For questions and further information

**Lindsey Capps**  
Chief Education Officer

[lindsey.capps@state.or.us](mailto:lindsey.capps@state.or.us)

**Ben Tate**  
Statewide Longitudinal Data System Director

[ben.tate@state.or.us](mailto:ben.tate@state.or.us)

A background image showing a group of four students sitting around a round table in a meeting. They are looking at papers and a laptop. The image is partially obscured by a white and grey overlay on the right side of the slide.

# STEM Innovation Grants

February 1, 2019



## Current STEM Innovation Grants

# Math in Real Life

- Supports expansion of regional networks to create an environment of innovation in math teaching and learning.
- Focus on applied mathematics
- Core principles:
  - Identifying rich content
  - Purposeful connection between content and context
  - Learning communities
- Desired outcomes:
  - Increase student math achievement aligned to Oregon standards
  - Decrease math achievement gap
  - Increase student interest and enthusiasm in math
  - Increase teacher prep for inquiry-based practices and applied math
  - Increase teacher enthusiasm and self-efficacy for math learning to include more challenging, open-ended applied math activities
  - Increase teacher belief that all students are capable of doing math

# Digital Literacy and Computer Science Innovation

- Provide professional development for digital literacy and computer science to teachers of grades 7 through 12
- Develop a statewide collaborative network of computer science educators
- Build a statewide framework for digital literacy and computer science
- Desired outcomes:
  - Increase student access to quality computer science coursework
  - Decrease achievement gaps in digital literacy and computer science
  - Create new CTE program of study
  - Increase teacher preparation for computer science and digital literacy learning
  - Conduct outreach to and support for historically underserved students

# STEM Outside of School

- Provide STEM experiences for 4<sup>th</sup> through 8<sup>th</sup> grade students, particularly those from historically underserved populations, outside of regular school time: after school, weekends, breaks,
- Desired outcomes:
  - Increase student interest, motivation, and enthusiasm around STEM
  - Ensure students develop a mindset and confidence to envision their future in a STEM career
  - Increase opportunities for student-centered, interactive, applied learning
  - Decrease opportunity gaps
  - Develop a statewide network of out-of-school providers
  - Develop baseline data to inform out-of-school STEM activities



# Possibilities for Future Grants

# Patterns High School Science Sequence

- 3 year course pathway/curriculum aligned to Next Generation Science Standards
  - Freshman physics
  - Sophomore chemistry
  - Junior biology
- Emphasizes use of mathematical and phenomenological patterns to predict the future and understand the past
- Approach:
  1. Initial “wild guess”
  2. Ask questions
  3. Plan and conduct experiments
  4. Collect data
  5. Find a mathematical model that fits their data
  6. Explain the phenomenon based on that model
  7. Make a data-informed prediction

# Oregon Science Project

- Equity-focused, statewide professional learning network
- Designed to build regional science education leadership throughout the state
- Professional learning facilitators lead regional teacher PD programs around NGSS with a focus on the historically underserved rural and semi-rural areas
- 30 learning facilitators, 200 educators in first 2 years

# STEM Leadership Academy for Administrators

- 2018-19 Pilot: 12-month professional learning for 20-30 school administrators (focus on principals)
- Goal is to deepen knowledge and understanding of STEM teaching and learning through the Equity Lens
- 3-Hub partnership, cohort model, professional development
- Action Learning Teams of administrators, supported by a coach, to explore specific issues/needs
- Will present work at June 2019 STEMPosium

# “Plus One” Courses

- **Bootstrap:Algebra; Bootstrap:Physics**
  - Research-based curricular modules for grades 6-12
  - Reinforce core concepts from subjects like Math and Physics, enabling non-CS teachers to deliver computer science concepts
  - Modules can be integrated into science, math, and computer science courses
  - E.g, in Bootstrap:Algebra, students create a simple computer game, using math concepts such as coordinate plains, order of operations, ratio and proportion, etc.
- **AMPED: Algebra 1 in Manufacturing Processes, Entrepreneurship & Design**
  - Teaching Algebra 1 through real-world, project-based lessons, labs, and activities
  - Aligned with Common Core state and national standards

<http://www.contextualc.com/amped/>
- **Geometry in Construction**
  - Combining standard geometry course with CTE construction course

<http://www.contextualc.com/geometry-in-construction/>

# Coder-in-Residence

- Develop and implement an elementary school 5-week “Gigabots” (internet-connected robots) curriculum
- Team-taught by teachers and coders
- Computational thinking, experimentation, control of internet-connected devices, STEM career opportunities, and the idea of creating, rather than simply consuming, technology.
- Curriculum focuses on robots and the logical structure of code
- Provide professional development to elementary school teachers
- Connect industry partners to classrooms

# ADVANCING STEM EDUCATION IN OREGON: STEM Investment Council, Regional STEM Hubs, and STEM Innovation Grants

January, 2019



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DRAFT

# STEM INVESTMENT COUNCIL

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## HISTORY AND PURPOSE

In 2013, through the passage and signing into law of House Bill 2636 (2012), Oregon’s Legislative Assembly and Governor Kitzhaber established the STEM Investment Council.

Originally operating under the direction of the Chief Education Office and supported by the staff of the Chief Education Office, as of July 1, 2018, the Council now operates under the joint direction of the State Board of Education (State Board) and Higher Education Coordinating Commission (HECC), and is supported by HECC staff.

The Council’s primary function is to assist the State Board and HECC in developing and overseeing a long-term strategy to advance Oregon’s target outcomes around science, technology, engineering, and mathematics (STEM) education, specifically:

1. Double the percentage of Oregon’s students in 4<sup>th</sup> and 8<sup>th</sup> grades who are proficient or advanced in mathematics and science by 2025.
2. Double the number of Oregon’s students who earn a postsecondary STEM degree or credential by 2025.

In addition to the development and oversight of a long-term, statewide STEM Education Plan, the Council makes recommendations to the State Board regarding the administration of the STEM Investment Grant Program ([ORS 327.380](#)) and grants to Regional STEM Hubs ([ORS 327.372](#)), and to the State Board and HECC regarding other investments in STEM education made or overseen by the Chief Education Office.

The Council submits an annual report to the State Board, HECC, and Legislative Assembly on progress made toward achieving the statewide STEM goals set forth in state statute and the STEM Education plan, and on the activities conducted under the STEM Investment Grant Program.

## MEMBERSHIP

The Council consists of nine voting members from the private sector, jointly appointed by the Superintendent of Public Instruction and the Executive Director of the Higher Education Coordinating Commission. Current members include:

Jim Piro (Chair)  
*President & CEO, Portland General Electric (retired)*

Eric Meslow  
*President, Timbercon*

Celeste Edman  
*CEO, Lunar Logic*

Paul Stewart  
*Chief Strategy Officer, Innovate Oregon*

Herb Fricke  
*President, Akana*

(Ex Officio) Melissa Dubois  
*Executive Director, South Metro-Salem STEM Hub*

Rita Hansen  
*CEO & Co-Founder, Onboard Dynamics*

(Ex Officio) Todd Nell  
*Director, Oregon Workforce and Talent Development Board*

In addition to its voting members, the Council is to recruit k-12 and postsecondary educators and administrators to serve as non-voting advisory members. The Council intends to make such recruitment a priority in 2019.

The Council may also recruit additional non-voting advisory members and establish advisory and technical committees. The Council used this authority to establish the following advisory and technical committees:

- Subcommittee on Equity
- Subcommittee on Data and Metrics
- Subcommittee on Advocacy and Communications

## STEM EDUCATION PLAN

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### WHY STEM?

When implemented effectively across the education continuum, STEM education has the power to engage students meaningfully in their studies, prepare Oregonians for high wage, high demand jobs, and empower our communities to build Oregon’s inclusive, sustainable, and innovation-based economy of the future.

In 2017, Oregon saw the fifth fastest job growth in the nation, adding 50,600 jobs.<sup>1</sup> A significant amount of that growth – and future projected job growth – is driven by demand in STEM fields. In fact, the Oregon Employment Department projects more than 430,000 job openings in STEM fields in Oregon between 2017 and 2027 – a growth rate of 15 percent, or 3 percent higher than the projected growth rate for all jobs in Oregon during the same 10-year period. Moreover, roughly 93 percent of the projected job openings in STEM fields are in high wage occupations and about 90 percent are in high demand occupations.<sup>2</sup> To fill these jobs and continue growth, Oregon’s employers need – now and in the future – a STEM-literate workforce.

Yet, the importance of STEM education reaches far beyond employer demand. STEM education based on career-connected, applied learning approaches, gets students excited about studies, empowers students to think about the possibilities for their futures, and increases student outcomes. Through its multidisciplinary, cross-sector methodology, STEM education provides students with the set of skills – critical thinking, problem solving, adaptability, etc. – to succeed in and shape Oregon’s competitive economy.

### STEM AND CTE

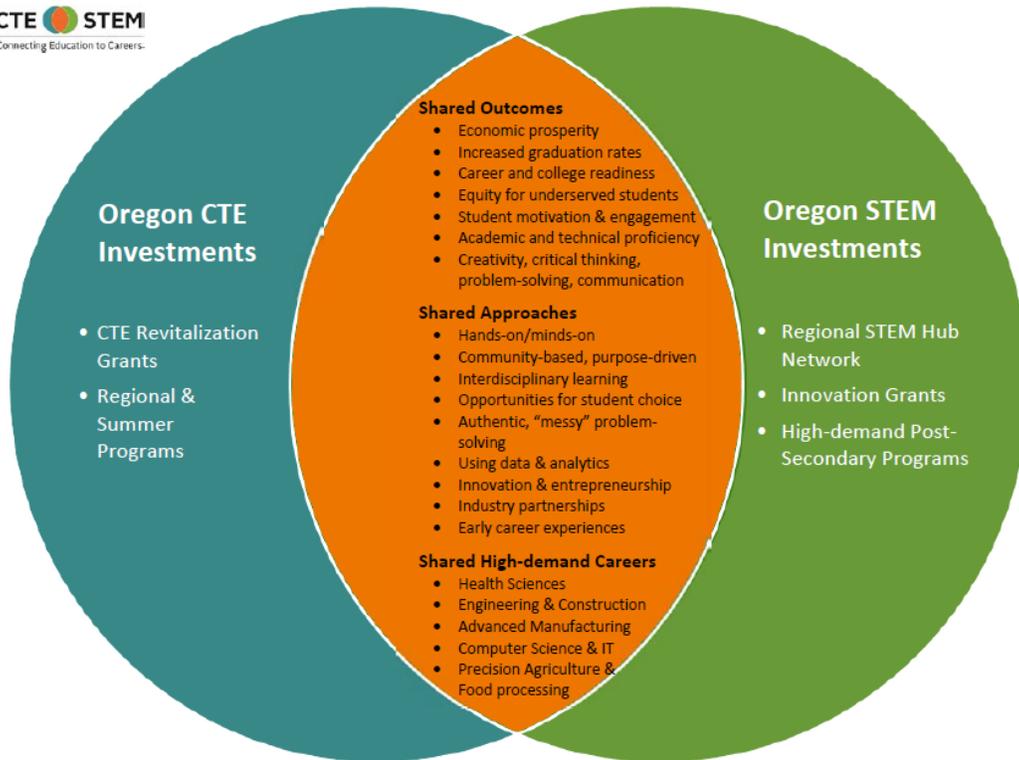
STEM and CTE are highly complementary and frequently overlap. Both types of programs engage and motivate students through real-world, applied learning, and foster creativity, critical thinking, problem-solving, communication, and teamwork. When STEM and CTE leaders and educators work together, they can leverage funding, broaden students’ exposure to a variety of academic and career opportunities, and ensure our future workforce possesses the mix of skills and knowledge necessary to catalyze economic development

Many CTE programs are in STEM fields, and, by including instruction on STEM concepts, provide students with the knowledge, theories, and assumptions underpinning the career and technical skills they are learning. These CTE programs can offer an entry point into STEM fields, particularly for students from underrepresented populations. Similarly, STEM education often incorporates elements of CTE, illuminating for students the connection between abstract concepts and future careers.

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<sup>1</sup> Oregon Employment Department, <https://www.qualityinfo.org/-/oregon-s-job-growth-fifth-fastest-among-the-states>

<sup>2</sup> Oregon Employment Department, <https://www.qualityinfo.org/-/10-year-occupational-projections-for-stem-jobs>



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## PLAN DEVELOPMENT

In December 2016, after more than 18 months of research, deliberation, and engagement, the STEM Investment Council formally recommended a comprehensive set of strategies to transform the delivery of science, technology, engineering, and mathematics in Oregon through the establishment of the STEM Education Plan. To develop the plan, the Council consulted educators, business, community-based organizations, and other stakeholders.

## GOALS

The STEM Education Plan’s vision is to “[r]eimagine and transform how we educate learners in order to enhance their life prospects, empower their communities, and build an inclusive sustainable, innovation-based economy. Oregonians of all races, economic status, and regions will develop the fundamental STEM-enabled skills and mindsets necessary to:

- Improve the prosperity of all individuals and communities across the state
- Become creative life-long learners who can adapt to changing social and economic conditions
- Fully contribute to an increasingly complex and technologically rich global society
- Address high-demand, competitive workforce and industry needs

<sup>3</sup> STEM Education Plan, [http://education.oregon.gov/wp-content/uploads/2016/11/STEM-Education-Plan-Final\\_CEdO\\_Nov\\_2016.pdf](http://education.oregon.gov/wp-content/uploads/2016/11/STEM-Education-Plan-Final_CEdO_Nov_2016.pdf)

In addition to the target outcomes related to STEM set forth in state statute, the STEM Education Plan identifies four central goals designed to spur interest, attainment, and opportunities for learners through STEM education:

- 1) Inspire and empower our students to develop the knowledge, skills, and mindsets necessary to thrive in a rapidly changing, technology rich, global society.
- 2) Ensure equitable opportunities and access for every student to become a part of an inclusive innovation economy.
- 3) Continuously improve the effectiveness, support, and the number of formal and informal P-20 STEM educators.
- 4) Create sustainable and supportive conditions to achieve STEM outcomes aligned to Oregon's economic, education, and community goals.

Each of these goals has a set of associated key initiatives, which, if implemented, will lead to achievement of that goal, and measurable priority outcomes that indicate progress toward that goal.

## NEXT STEPS

In November 2018, the STEM Investment Council began the process of reviewing the STEM Education Plan, asking of itself the following questions:

- Are the goals still the right goals?
- Are the priority outcomes still the right priority outcomes?
- Are the key initiatives still the right key initiatives?
- Have we identified the correct metrics to monitor progress?
- Do we have the ability to collect the identified metrics?
- What progress has been made toward each goal?

Upon completion of the review, if necessary changes are identified, the Council will make recommendations to the State Board and HECC on revisions to the plan.

## MEASURING PROGRESS

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State statute and the STEM Education Plan include a number of desired outcomes related to STEM education. This section includes analyses of the topline data used to measure progress toward the STEM goals, where available. Appendix A includes additional analyses of the data disaggregated by race/ethnicity, gender, socioeconomic status, and region for each goal for which data was available.

Not all of the metrics identified in the STEM Education Plan are addressed in the section due to difficulty in collecting and access certain data. However, the STEM Investment Council continues to be committed to identifying sources for and organizing the collection of these data. The Council hopes that, once completed, the State Longitudinal Data System<sup>4</sup> will be a critical resource for measuring progress on STEM education.

➔ **OUTCOME: Double the percentage of 4<sup>th</sup> and 8<sup>th</sup> grade students proficient in math**

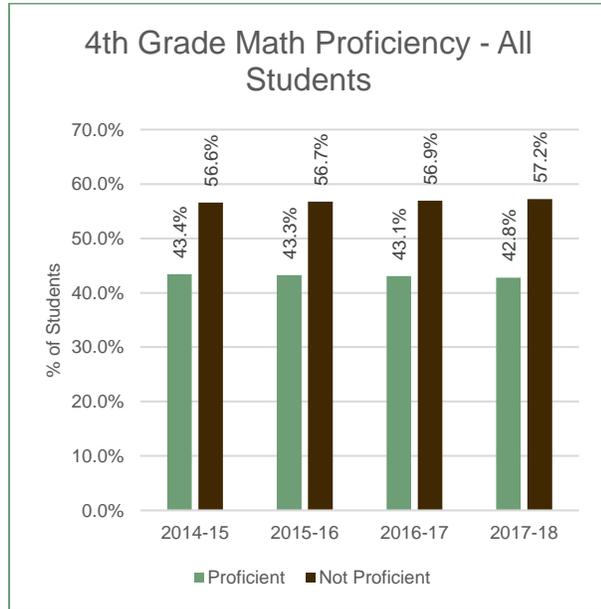
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<sup>4</sup> <http://education.oregon.gov/slds/>

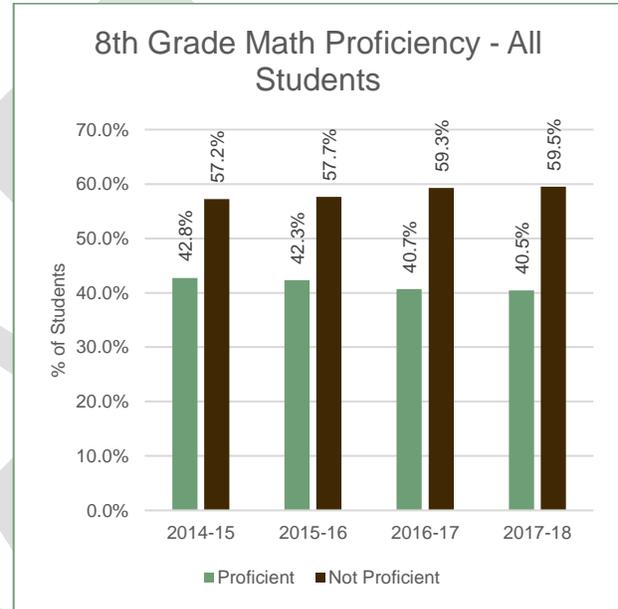
Charts 1 and 2 compare the percentage of students deemed proficient (achieving level 3 or 4) on the 4<sup>th</sup> and 8<sup>th</sup> grade statewide mathematics assessments in 2014-15, 2015-16, 2016-17, and 2017-18.<sup>5</sup> The analysis shows that, for both 4<sup>th</sup> and 8<sup>th</sup> grades, proficiency rates fluctuated by a few percentage points from year to year with no clear trend.

Appendix A includes additional charts displaying math proficiency rates for 4<sup>th</sup> and 8<sup>th</sup> grades by race/ethnicity, gender, socioeconomic status, and region.

**Chart 1**



**Chart 2**



**→ OUTCOME: Double the percentage of 4<sup>th</sup> and 8<sup>th</sup> grade students proficient in science**

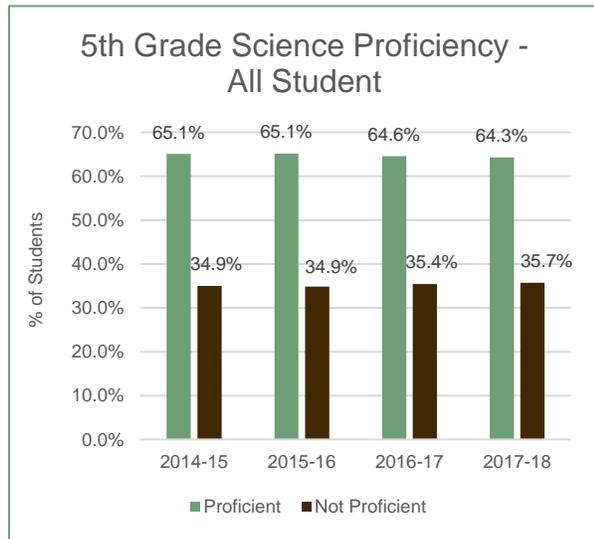
Charts 3 and 4 compare the percentage of students deemed proficient (achieving level 3 or 4) on the 4<sup>th</sup> and 8<sup>th</sup> grade statewide science assessments in 2014-15, 2015-16, 2016-17, and 2017-18.<sup>6</sup> The analysis shows that, for both 4<sup>th</sup> grade students, proficiency decreased by less than a percentage point between 2014-15 and 2017-18, and for 8<sup>th</sup> grade students, proficiency decreased by more than 3 percentage points between 2014-15 and 2017-18.

Appendix A includes additional charts displaying science proficiency rates for 4<sup>th</sup> and 8<sup>th</sup> grades by race/ethnicity, gender, socioeconomic status, and region.

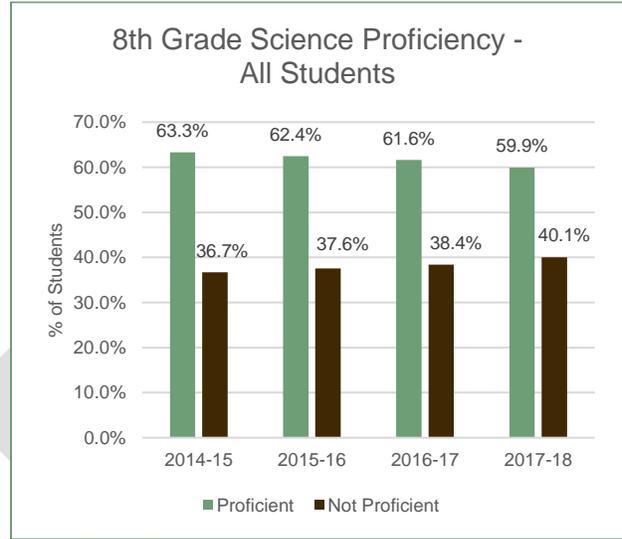
<sup>5</sup> Oregon Department of Education, <https://www.oregon.gov/ode/educator-resources/assessment/Pages/Assessment-Group-Reports.aspx>

<sup>6</sup> Oregon Department of Education, <https://www.oregon.gov/ode/educator-resources/assessment/Pages/Assessment-Group-Reports.aspx>

**Chart 3**



**Chart 4**

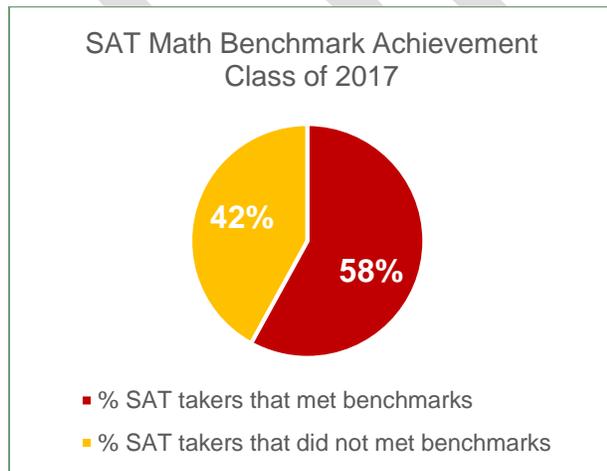


➔ **OUTCOME: Double the number of Oregon’s students with postsecondary STEM degrees and certificates** *[Awaiting data from HECC Office of Research and Data]*

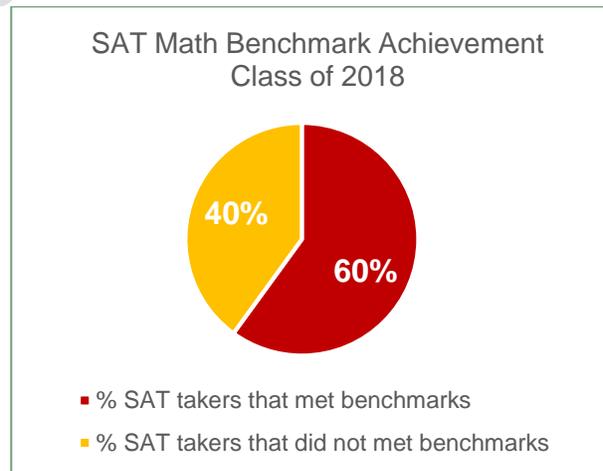
➔ **OUTCOME: Increase success on AP, ACT, and SAT STEM Tests**

Charts 5 and 6 show the percentage of SAT test takers from the 2017<sup>7</sup> and 2018<sup>8</sup> graduating classes that met the math benchmark score (benchmark data for earlier years were not available).<sup>9</sup>

**Chart 5**



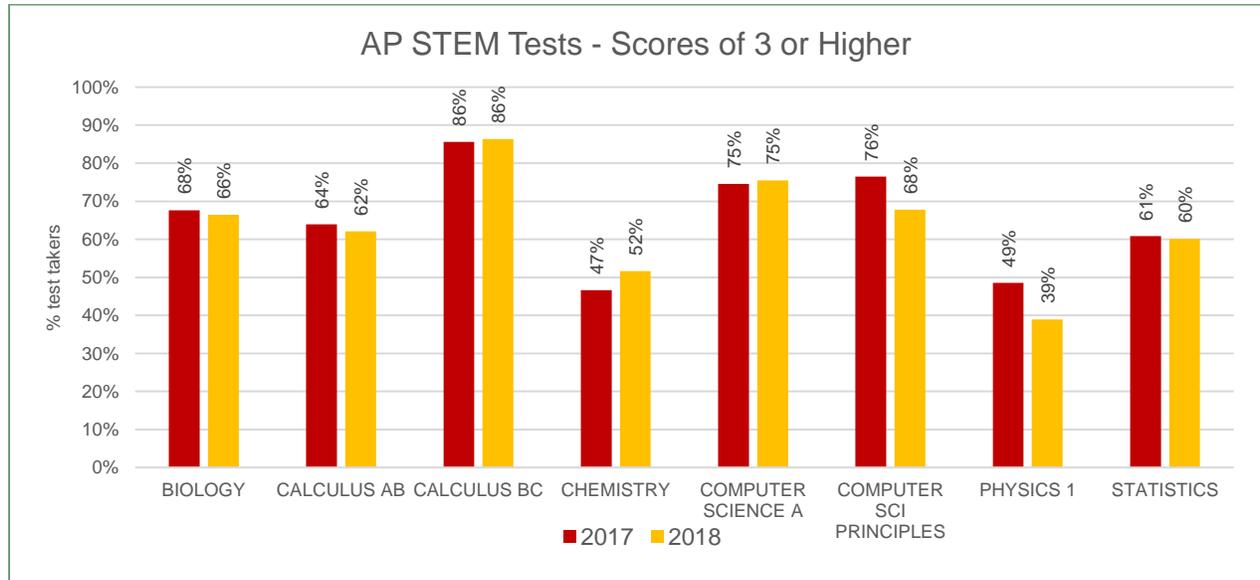
**Chart 6**



<sup>7</sup> College Board, <https://reports.collegeboard.org/pdf/2017-oregon-sat-suite-assessments-annual-report.pdf>  
<sup>8</sup> College Board, <https://reports.collegeboard.org/pdf/2018-oregon-sat-suite-assessments-annual-report.pdf>  
<sup>9</sup> Students with an SAT Math score that meets or exceeds the benchmark have a 75 percent chance of earning at least a C in first-semester, credit-bearing college courses in algebra, statistics, pre-calculus, or calculus (<https://collegereadiness.collegeboard.org/about/scores/benchmarks>).

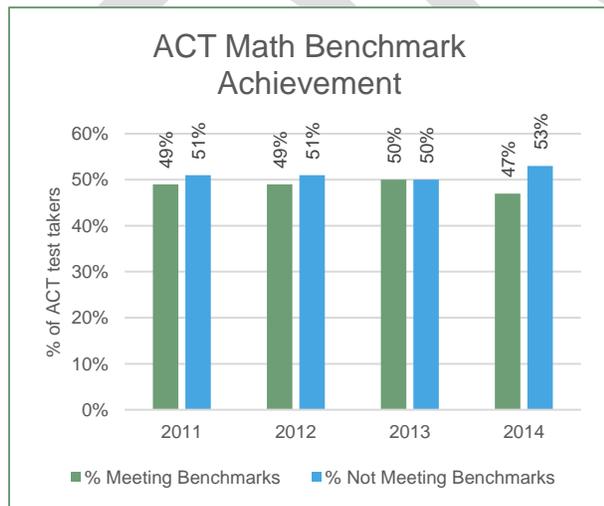
Chart 7 shows the percentage of students achieving a score of 3 or higher on a selection of AP STEM tests in 2017<sup>10</sup> and 2018<sup>11</sup>.

**Chart 7**

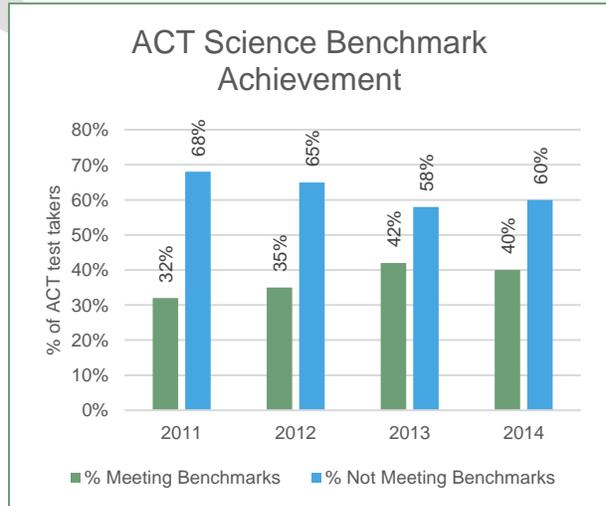


Charts 8 and 9 show the percentage of ACT test takers from the 2011 – 2014 graduating high school classes that met the math and science benchmark scores (data for subsequent years were not available).<sup>12,13</sup>

**Chart 8**



**Chart 9**



<sup>10</sup> College Board, <https://secure-media.collegeboard.org/digitalServices/misc/ap/oregon-summary-2017.xlsx>

<sup>11</sup> College Board, <https://secure-media.collegeboard.org/digitalServices/misc/ap/oregon-summary-2018.xlsx>

<sup>12</sup> [http://www.act.org/content/dam/act/unsecured/documents/STEM2016\\_38\\_Oregon.pdf](http://www.act.org/content/dam/act/unsecured/documents/STEM2016_38_Oregon.pdf)

<sup>13</sup> Students with an ACT Math score that meets or exceeds the benchmark have a 75 percent chance of earning at least a C in first-semester, credit-bearing college courses (<http://www.act.org/content/act/en/college-and-career-readiness/benchmarks.html>)

Appendix A includes additional charts displaying SAT, AP, and ACT data disaggregated by race/ethnicity, gender, and socioeconomic status when available.

➔ **OUTCOME: Increase number of students enrolled in postsecondary STEM programs**

## REGIONAL STEM HUBS

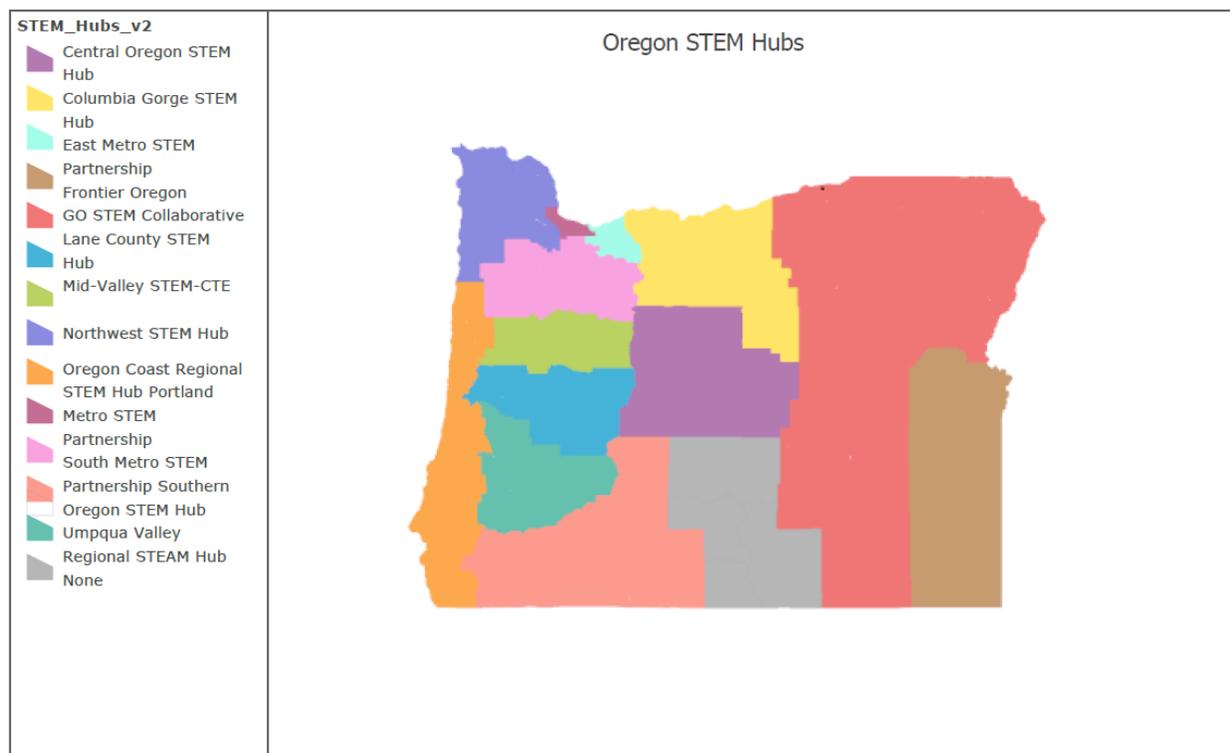
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### HISTORY AND PURPOSE

As a key strategy to accelerate improved outcomes across the state, the State Legislature created a statewide network of Regional STEM Hubs. These hubs devise local solutions to local needs. They coordinate regional communication and partnerships, improve key student outcomes, build capacity and sustainability for change, and encourage and support local and statewide engagement.

The Hubs are multi-sector partnerships that link local P-20 educators with representatives from workforce and economic development, community-based organizations, and business to transform STEM teaching and learning.

Originally a network of six, there are now 13 Regional STEM Hubs throughout the state.



## BY THE NUMBERS

The tables below include data collected by the Regional STEM Hubs and demonstrate the collective impact of the Regional STEM Hubs during the 2017-19 Biennium.

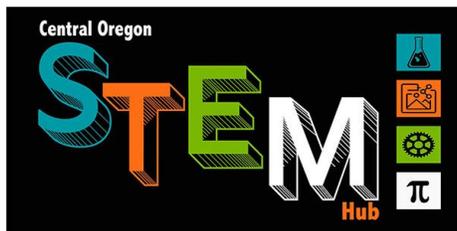
<b>STEM Hub Impact Data</b>	<b>Value</b>	<b>Units</b>
Number of educators who participated in Hub PD or programs	4,129	Educators
Number of educator hours spent in Hub PD and programs	43,383	Educator Hours
Average number of PD hours per educator	11	Hours
Project number of students impacted by educator PD participation	223,559	Students
Percent of students in Oregon impacted by STEM Hub PD to their teachers	38.50%	% of students in Oregon
Number of industry volunteers who participated in Hub activities	2,892	Industry Volunteers
Number of industry volunteer hours	13,186	Industry Volunteer Hours
Number of students who participated in Hub directed programs	37,818	Students
Number of student hours in Hub directed programs	181,272	Student Hours
Estimate of students who benefit from equipment loaning programs	49,228	Students
Estimate of teachers who benefit from equipment loaning programs	897	Educators

<b>STEM Hub Leveraged Funding</b>	<b>\$</b>
Grants and sponsorships (current biennium)	\$2,333,501.00
Partner investments in Hub initiatives	\$1,490,729.81
In-kind time and resources	\$967,865.52
Funding and in-kind secured for future biennia	\$3,001,870.21
<b>Total</b>	<b>\$7,793,966.54</b>

## HUB SNAPSHOTS

The following “snapshots” provide a brief glimpse into the activities and impacts of the Regional STEM Hubs. Appendix B includes additional information about each Regional STEM Hub and its partners, initiatives, and impact.

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### FAST FACTS

- Professional development to **583 educators** totaling **4,448 hours**, impacting **33,830 students** (2017-19)
- **1,076 industry volunteers** donated **5,557 hours** to participate in Hub activities (2017-19)
- **10,986 students** spent **27,345 hours** in Hub directed programs (2017-19)

### Spotlight Initiative: COMPUTER SCIENCE TASKFORCE

The Computer Science Taskforce, a collective group of industry, K-12 educators, administrators, Tech Directors and post-secondary partners, has collaborated for just over a year to prioritize building a Computer Science (CS) pipeline and integration in our schools to align with growing industry demand in our region. The taskforce has identified CS Champions, defined CS education and integration, vetted curriculum, and are providing unique student involved teacher PD like “Makeathons” and Educator Externships. The momentum of this taskforce has led to some identifiable quick wins, including going from 1 middle school with a CS elective to 12 schools with district-allotted collaboration time, increasing from 1 to potentially 5 new CTE CS Programs of Study, partnering with Lane STEM Hub and ODE for \$642K grant for CS pre-apprenticeship work to impact rural schools across the state. With strong teacher champions at the middle school level, we leverage those resources to push demand to the high school.

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### FAST FACTS

- Impacted an estimated **1,200 students** through STEM Nights and Introduce a Girl to Engineering events at **8 locations** (2018)
- Provided professional development to **49 local educators**, impacting an estimated **564 students** through the 2018 STEM Symposium (2018)
- **13 Microgrants and Field Trip Grants** awarded totaling **\$12,191.24** and impacting an estimated **1,685 students** (2017-18)

### Spotlight Initiative: GORGE STEM FAIR

The Gorge STEM Fair is an annual celebration of Science, Technology, Engineering, and Math in the Columbia Gorge. In June 2018 an estimated 2000+ community members, from toddlers to grandparents, engaged in hands-on STEM activities, all inspired by local businesses, nonprofits, and school groups. This annual event helps raise awareness of what STEM is, why it is important, and how to get involved. It is also an example of how STEM Hubs can use collective impact to magnify great work in their communities. The Columbia Gorge STEM Hub expanded an event started by a local robotics team – originally including about 10 groups – to include 50 partner organizations and over 100 STEM Professionals. The Gorge STEM Fair has proven to be not only impactful but also cost effective – all costs were covered by local sponsors.

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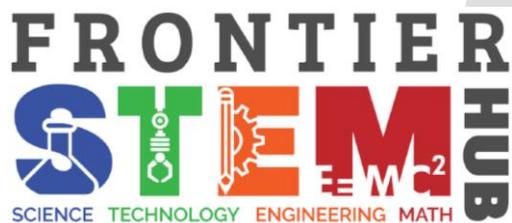


#### FAST FACTS

- **148 educators** received **1,362 professional development hours**, impacting an estimated **28,245 students** (2017-19)
- **625 students** participated **21,419 hours of STEAM learning** in EMSP-supported/funded programs (2017-19)
- EMSP has brought over **\$1,000,000 in STEM investments** to the East Metro area since 2015

#### Spotlight Initiative: YOUTH IN STEAM COMMUNICATIONS

The East Metro STEAM Partnership established the Youth in STEAM Communications project as a collaborative among the Center for Advanced Learning (CAL), Lewis Creative, and MetroEast Community Media. The purpose of this project is to build awareness of STEAM for the cross-sector audiences of EMSP. CAL Digital Media and Design students participated in paid internships with Lewis Creative and MetroEast Community Media. As a result, six student interns produced a [promo video](#), [STEAM banners](#), social media messages based on audience profiles ([Seniors](#), [Parents](#), [Students](#), [Educators](#), [Non-Profits](#), and [Industry](#)) and [content strategy](#). In 2019, additional student interns will develop a photojournalism project, a brochure, motion graphics, and a passport for STEAM activities. In an October 2018 event held by Lewis Creative for the Gresham Chamber of Commerce, Haley Lewis showcased the content created by the interns, resulting in a post receiving 43 Likes, 27 Comments, 9 Shares, and reached 350 people.



#### FAST FACTS

- **824 educators** participated in Hub professional development or other programs
- **5,764 educator hours** spent in Hub professional development or other program
- An estimated **13,354 students** impacted by educator professional development participation

#### Spotlight Initiative: EXPLORING STEM THROUGH THE LENS OF AVIATION

Oregon State University Extension, Frontier STEM Hub, Frazier Aviation, University of Idaho Extension, and Treasure Valley Community College Aviation program collaborated with community partners to deliver interactive field days, day camps, and classroom activities for youth. *Exploring STEM Through The Lens of Aviation* program integrates science, technology, engineering, and math into experience and inquiry-based activities that meet Next Generation Science and Common Core Standards. The target population for the aviation activities are disadvantaged and underserved youth grades 6-8. Over the past three years, the aviation programs have reached over 450 youth per year. Student participants reported an increased interest in STEM careers.



#### FAST FACTS

- **1,634 hours** of teacher training provided to **240 educators** (2017-19)
- **3,723 total hours** of student participation provided to **357 students** in out of school programs/events (2017-19)
- **352 total hours** of participation donated from **70 industry professionals** (2017-19)

#### Spotlight Initiative: CHIEF SCIENCE OFFICER PROGRAM

GO-STEM participates in the nationwide Chief Science Officer (CSO) Program. CSOs are high school students who choose to serve as local STEM leaders. Each CSO completes an independent or team project in

their area of passion. In 2018, there were 21 CSOs (roughly the same number of males and females) and 9 advisors across 6 counties. Each CSO disperses information throughout their community and school and attends a 2-day Leadership Institute at EOU, as well as regional trainings and networking events. CSOs also arranged and hosted a “Dinner with a STEM Professional,” for 25 students, 18 teachers, 15 VIPs, and 8 STEM professionals. The dinner provided opportunities to learn from and network with different industry professionals from across the region.

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#### FAST FACTS

- **1,573 4<sup>th</sup>/5<sup>th</sup> graders** received 6 weeks of programming lessons from their teacher & a woman from our local tech community
- **5,432 hours** of professional development delivered to educators
- 187 industry partners involved in some capacity

#### Spotlight Initiative: ELEVATE LANE COUNTY

Elevate Lane County places Lane County high school educators in work-based learning experiences over the summer months. Since its inception, 11 educators from 13 different high schools in eight school districts have spend 4,000+ hours with 23 different companies. Externships are a key component in developing students who are in touch with the demands of the workplace and the skills—both technical and professional—that they need to be hired as successful employees. Educators who are exposed to the culture and values of an industry become more prepared to implement curriculum that is beneficial to student preparation.

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#### Mid-Valley STEM-CTE HUB



#### FAST FACTS

- **75 high school students** participated in *Metals and Manufacturing for Women and All High School Students Day*; **70 were female** (2019)
- **27 high school students** participated in 10-week Central Electric Training Center *Trades Academy* course (2018)
- **23 teachers and counselors** participated in a summer externship at several manufacturing companies (2018)

#### Spotlight Initiative: MANUFACTURING DAY

The Albany Chamber of Commerce is a Mid-Valley STEM-CTE Hub partner and operates a workforce development program called *Pipeline* that links educators to local business and industry providing teachers and their students authentic work-based learning experiences. The program is funded by industry partners. Sponsored by the Mid-Valley STEM-CTE Hub and *Pipeline*, Manufacturing Day was held on October 5, 2018. Two-hundred middle school students and their teachers from 13 school districts toured manufacturing sites, met employees, and learned about careers, math, science, engineering, and technology in a real world, workplace setting. They also toured Linn-Benton Community College Career and Technical Education manufacturing programs (e.g, Welding and Nondestructive Testing).

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#### FAST FACTS

- Professional development provided to **47 teachers, counselors, and administrators**, impacting an estimated **1,765 students** (2018)
- Partner for the Clatsop Career and Job Fair attended by **6 school districts, 650 students, and 73 employers** (2018-19)
- **13 career-connected learning field trips** with a total of **26 impacted educators and 260 impacted students** (2018-19)

#### Spotlight Initiative: CLATSOP WORKS

The Northwest STEM Hub has been actively engaged in promoting a Career Connected Learning initiative throughout our region, which includes Clatsop, Columbia, and Tillamook counties. This work includes developing Clatsop Works, a paid, summer internship program for youth in Clatsop County. Clatsop Works recruits students from the county's five school districts Astoria, Warrenton-Hammond, Seaside, Knappa, and Jewell, along with engaging Clatsop Community College students and programs. During the summer of 2018, Clatsop Works had 56 applicants, 16 interns employed full time, 11 host employers, and 7 professional development workshops for the interns. Clatsop Works is currently preparing for summer of 2019 and thus far we have 90 applicants and 30 host employers. The program continues to grow in Clatsop County with overwhelming community support and progress is being made on scaling and replicating the Works programs in Columbia and Tillamook counties.

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#### FAST FACTS

- Collaborates with more than **60 partners**, including 21 school districts, 6 postsecondary education institutions, 13 community organizations, 7 businesses, 6 government agencies, 5 centers, one regional achievement collaborative, and one Confederated Tribe
- Through its partnerships, provided **22,000 contact hours** of student STEM experiences
- Through its partnerships, provided **9,020 teacher professional development contact hours**

#### Spotlight Initiative: SUMMER 2018 HIGH SCHOOL INTERNSHIPS: PORT ORFORD GRAY WHALE FORAGING ECOLOGY RESEARCH

For the first time, Port Orford high school students participated in community-based summer internships where they worked shoulder to shoulder with Hatfield Marine Science Center researchers and OSU undergraduate students on the gathering of data on gray whale habitat use and zooplankton community structure. One intern reflected: "So far I have gained skill after skill in this internship. I got CPR certified, took a kayak training class, learned how to use a theodolite, and have spent many educational (and frustrating) hours entering data in Excel... It surprised me that I was developing a relationship with the whales I'm researching. By the end of August I'm now sure that I will also know many of the whales by name...and I will have had my first taste at what being a scientist is like." Visit <https://www.youtube.com/watch?v=mhgutfz8PGY> for a video about the experience.

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#### FAST FACTS

- Estimated **79,031 students** benefited from professional development provided by Portland Metro STEM Partnership (PMSP) to educators
- Co-funded/partnered with school districts to develop/deliver Patterns High School Science Courses to **31.75% of Oregon's high school students**
- Leveraged \$2,725,000 during the 2017-19 biennium to support STEM education in the PMSP region

#### Spotlight Initiative: COLLECTIVE IMPACT

The Portland Metro STEM Partnership is proud to be a leader in the STEM hub network. Established in 2011, PMSP was the prototype STEM hub and precursor to the now 13-Hub STEM Network. We focus on leveraging and supporting systems-level improvements with impactful initiatives such as STEM school transformation and *High School Science for All*. Because PMSP has a longer history of engaging in Collective Impact work, we are able to leverage our experience and expertise to benefit the STEM Hub Network. We leverage opportunities for Hubs to work together; for example, the STEM Leadership Academy engages three STEM Hubs to provide professional development to elementary administrators and the Project Impact Action Work allows nine STEM hubs plus community partners to utilize impact evaluation more effectively.



#### FAST FACTS

#### Summer STEAM Camps

In 2018, the Southern Oregon STEM Hub hosted 16 week-long camps for 382 students between the 2<sup>nd</sup> and 9<sup>th</sup> grades. The Hub focused its recruitment efforts for the camps on reaching underserved students : those who rarely have access to or can afford such opportunities. As a result, 38% of those students identified as Hispanic and 85% were economically disadvantaged.



#### FAST FACTS

- Engaged **770 industry volunteers** in more than **1,400 hours** of classroom visits, industry tours & teacher/administrator professional development (2017-19)
- Provided **3,200 hours** of professional development to **over 600 educators** impacting an estimated **37,830 students** (2017-19)
- Increased enrollment in high school STEM/CTE electives by **13% overall, 22% among Hispanic/Latino students, 17% among English Language Learners, 16% among students receiving free/reduced lunch** ; increased enrollment in STEM accelerated credit (AP, IB, Dual Credit) courses by **2%** (between 2014-15 and 2015-16)

#### Spotlight Initiative: OREGON CONNECTIONS

Oregon Connections, powered by Nepris, brings learning to life though a web-based tool that pairs classrooms with industry professionals for real-time virtual and in-person interactions. Developed by the South Metro-Salem STEM Partnership and expanded statewide, teachers request local experts to engage in classroom

experiences, or tap into a nationwide network of over 40,000 professionals of diverse backgrounds for virtual experiences. Oregon Connections has reached 15,000 students through more than 300 experiences. It is a powerful tool for rural communities, helping to address the inspiration gap that persists for students outside the metro corridor. It is an emerging game-changer for underserved youth, exposing them to jobs and careers outside of their lived experience, and to successful people who look like them who have pursued those paths. Oregon industry volunteers have impacted more than 30,000 students across the nation, raising visibility of Oregon companies and supporting the state and national STEM pipeline.

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#### FAST FACTS

- **129 educators** received at least **1,120 hours** of professional development, impacting an estimated **3,050 students**
- At least **439 students** participated in **12,544 contact hours** of Hub-supported STEM programs (2018-19)
- **131 educators** are registered users of the STEAM Resource Lending Library, impacting at least **4,450 students** through lending library resources.

#### Spotlight Initiative : BRIGHT FUTURES UMPQUA

As part of the Bright Futures Umpqua Initiative (expanding STEAM Career Connected Learning experiences for students) the Umpqua Valley STEAM Hub (UVSH) has led the planning and delivery of middle school summer camps promoting STEAM careers and linked to local high school CTE programs. 144 middle school youth from across Douglas County participated in week long Expanding Horizons camps in 2018 focused on manufacturing and technology, drafting and production, business entrepreneurship, the Trades and Natural Resources. Eight total camp weeks were offered. In 2016 and 2017, 266 students participated. 60% represent underserved populations. Camp offerings will be expanded this summer to include healthcare careers. Students participate in projects and activities led by trained staff and representatives from business and industry. When possible, tours to industry sites are included. Partners include Umpqua Community College, the Douglas ESD, the National Guard, Wolf Creek Job Corps, DR Johnson Lumber Company, ORENCO Systems, Inc., and local school districts.

## STEM INNOVATION GRANTS

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### HISTORY AND PURPOSE

In the 2015-17 Biennium, the State Legislature allocated \$4,500,000 for STEM Innovation Grants. These grants are designed to expand the implementation of effective programs related to STEM and propose innovative approaches or programs that provide professional development to transform instruction within the STEM disciplines. Funding for the first round of grants was divided amongst four STEM Innovation Grant programs:

- 1) Providing professional development around applied mathematics to educators of grades 7 through 10
- 2) Identifying and piloting computer-based adaptive learning environments for K-8 students
- 3) Providing professional development around digital literacy to educators of grades 7 through 12
- 4) Partnering with existing out-of-school STEM programs to expand out-of-school opportunities for STEM learning in grades 4 through 8

In the 2017-19 biennium, the Legislature reduced funding for STEM Innovation Grants to \$4,430,000.

## **2017-19 GRANTS**

In the 2017-19 biennium, the STEM Investment Council and Department of Education decided to continue funding three out of four original STEM Innovation Grant Programs: Math in Real Life, Digital Literacy and Computer Science Innovation, and STEM Beyond Schools. Descriptions of each program follow.

### **Math in Real Life**

Math in Real Life (MiRL) supports the expansion of regional networks to create an environment of innovation in math teaching and learning. The focus on applied mathematics supports the natural interconnectedness of math to other disciplines while infusing relevance for students. MiRL supports a limited number of networked math learning communities that focus on developing and testing applied problems in mathematics. The networks help math teachers refine innovative teaching strategies with the guidance of regional partners and the Oregon Department of Education.

### **Digital Literacy and Computer Science Innovation**

The Digital Literacy and Computer Science Innovation grant supports professional development for digital literacy and computer science teachers of grades 7 through 12. In addition, the grant supports the development of a statewide framework for digital literacy and computer science.

### **STEM Beyond Schools**

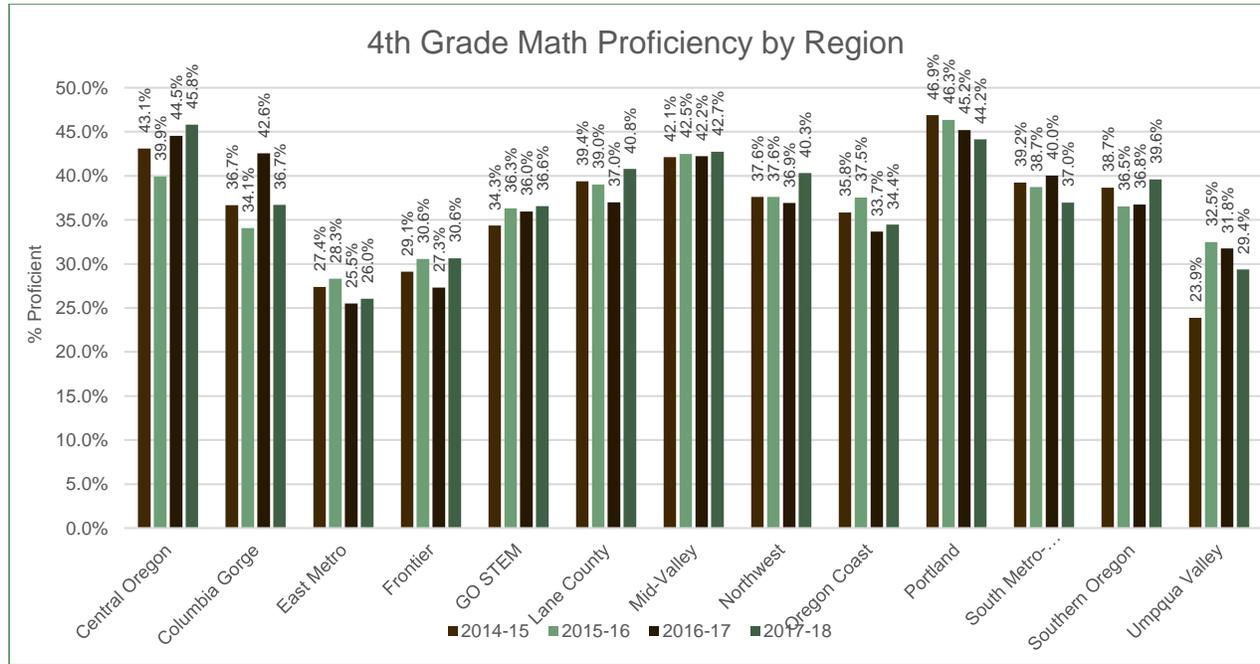
STEM Beyond Schools provides a series of STEM experiences for students in grades 3 through 8 with a focus on serving students of color, students in poverty, students with disabilities, and English language learners. These experiences take place outside of regular school time: after school, weekends, breaks, and/or summer. This program also supports professional development for educators and the formation of a statewide network for community-based out-of-school STEM learning providers.

Appendix C includes additional information on the 2017-19 STEM Innovation Grants.

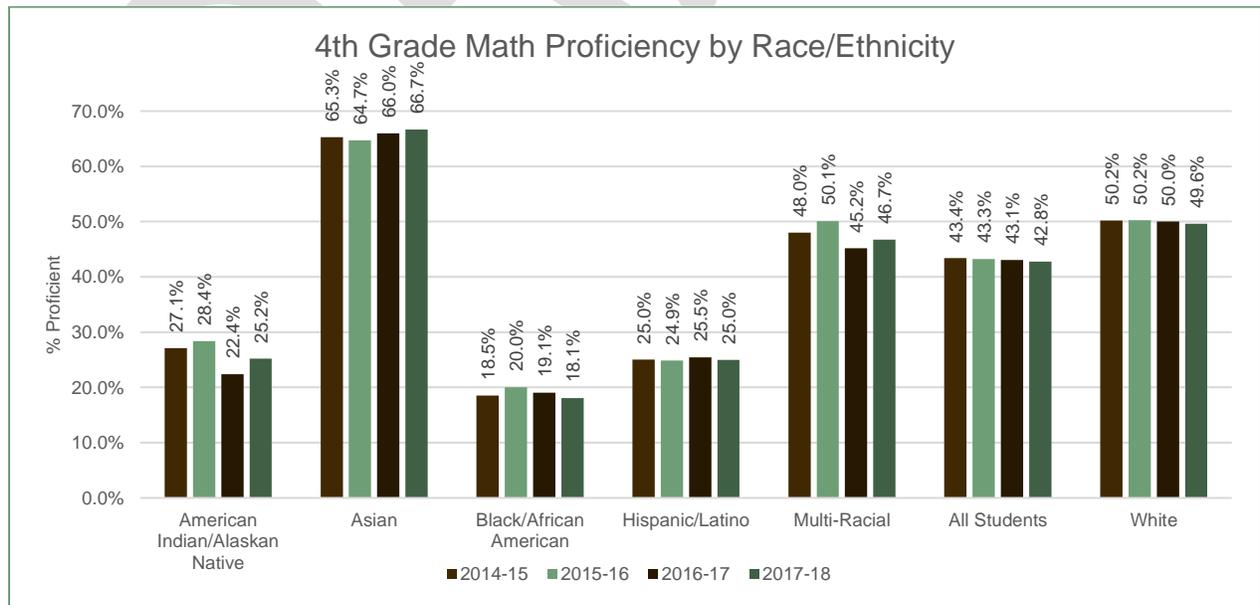
# APPENDIX A: DATA ANALYSIS

## 4TH GRADE MATH PROFICIENCY<sup>14</sup>

**Chart 10**

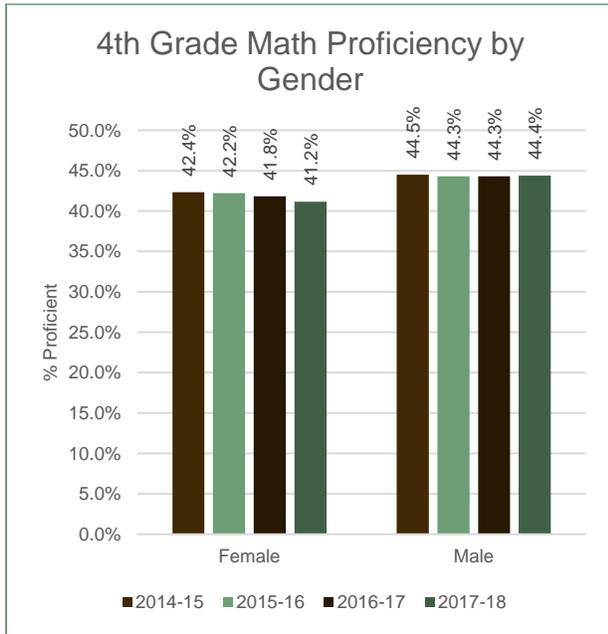


**Chart 11**

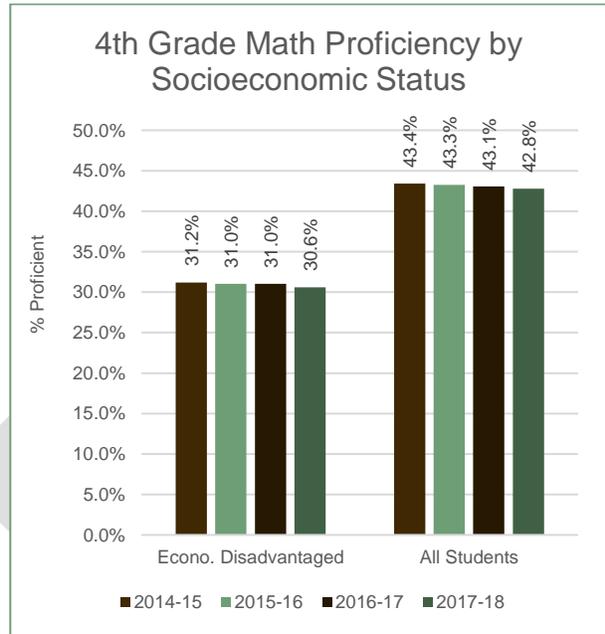


<sup>14</sup> Oregon Department of Education, <https://www.oregon.gov/ode/educator-resources/assessment/Pages/Assessment-Group-Reports.aspx>

**Chart 12**

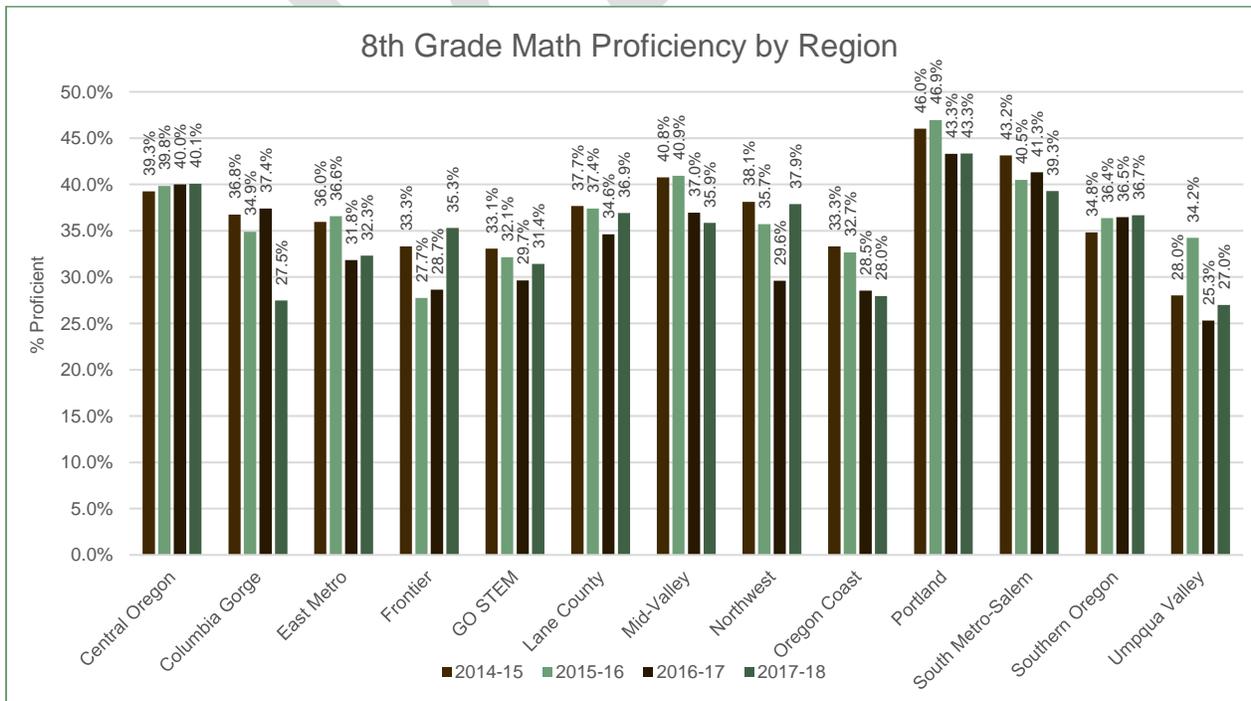


**Chart 13**



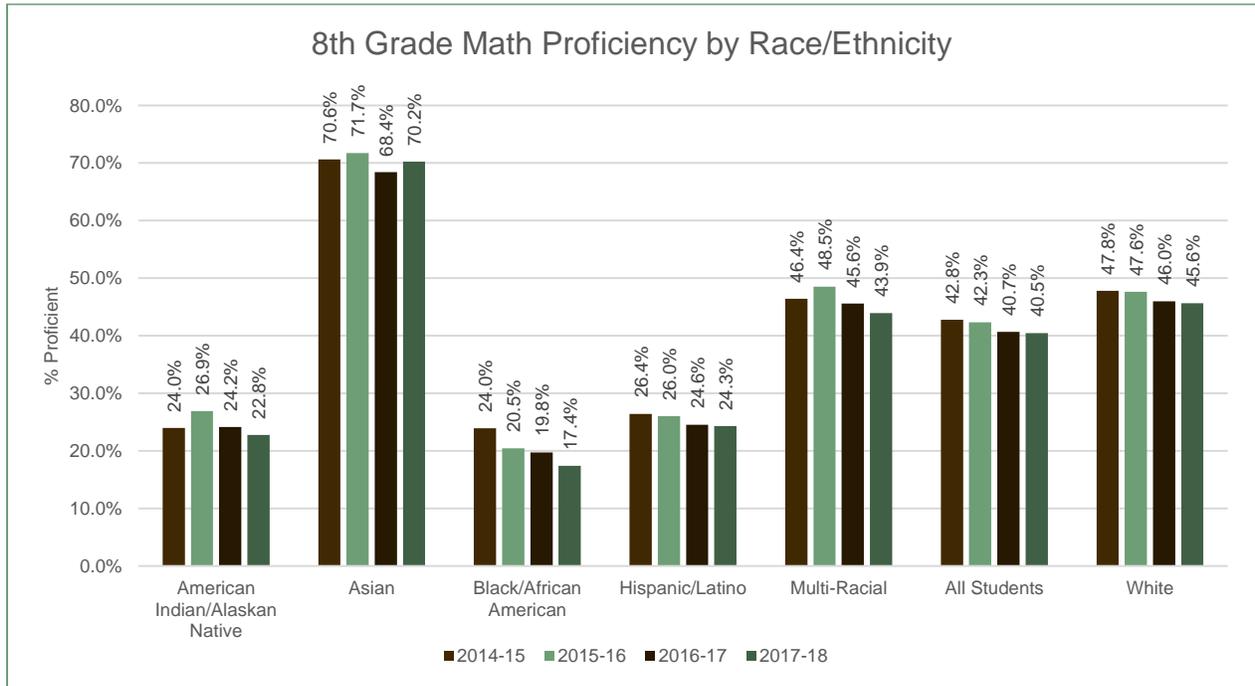
**8TH GRADE MATH PROFICIENCY<sup>15</sup>**

**Chart 14**

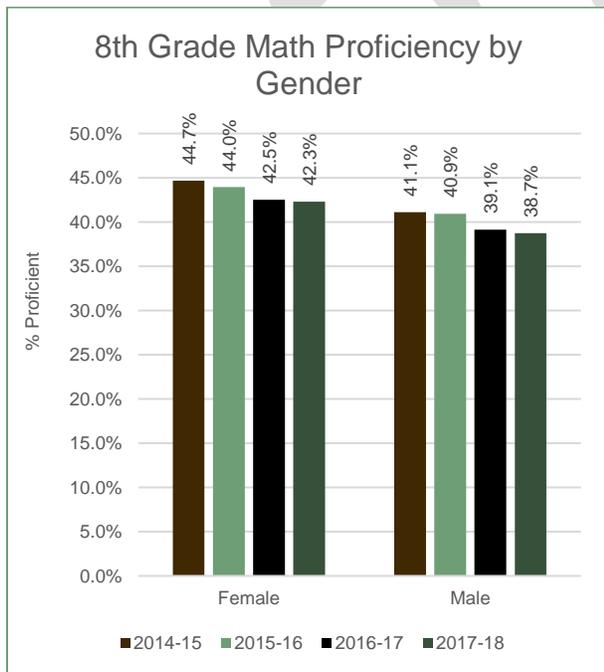


<sup>15</sup> Oregon Department of Education, <https://www.oregon.gov/ode/educator-resources/assessment/Pages/Assessment-Group-Reports.aspx>

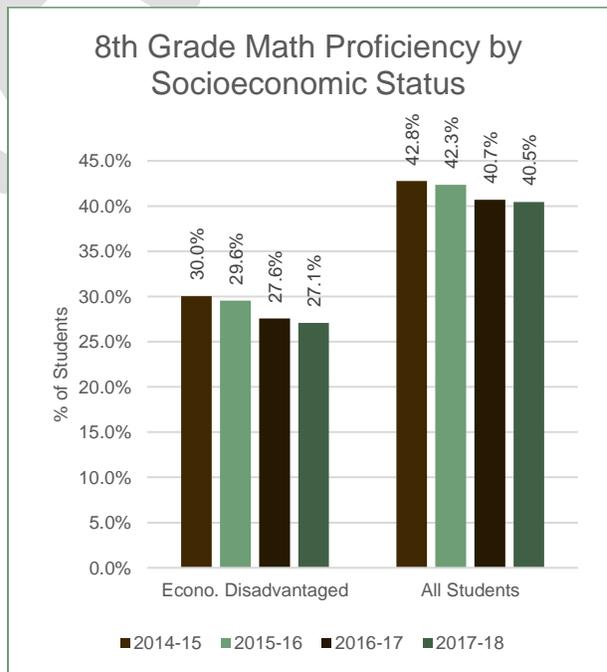
**Chart 15**



**Chart 16**

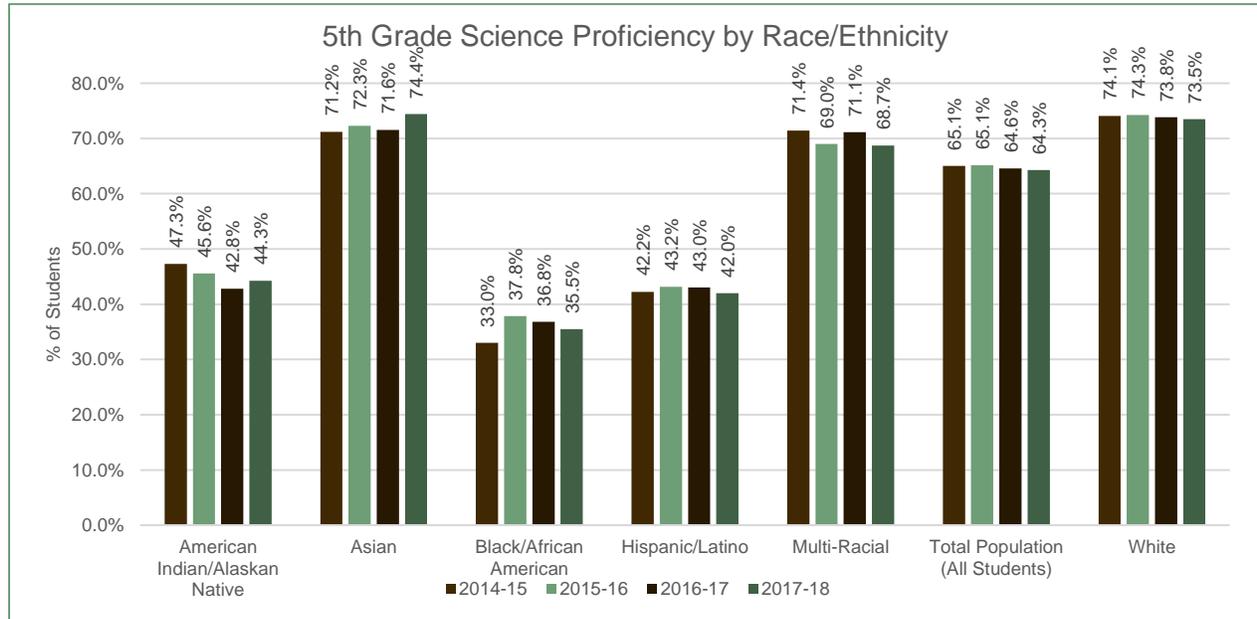


**Chart 17**

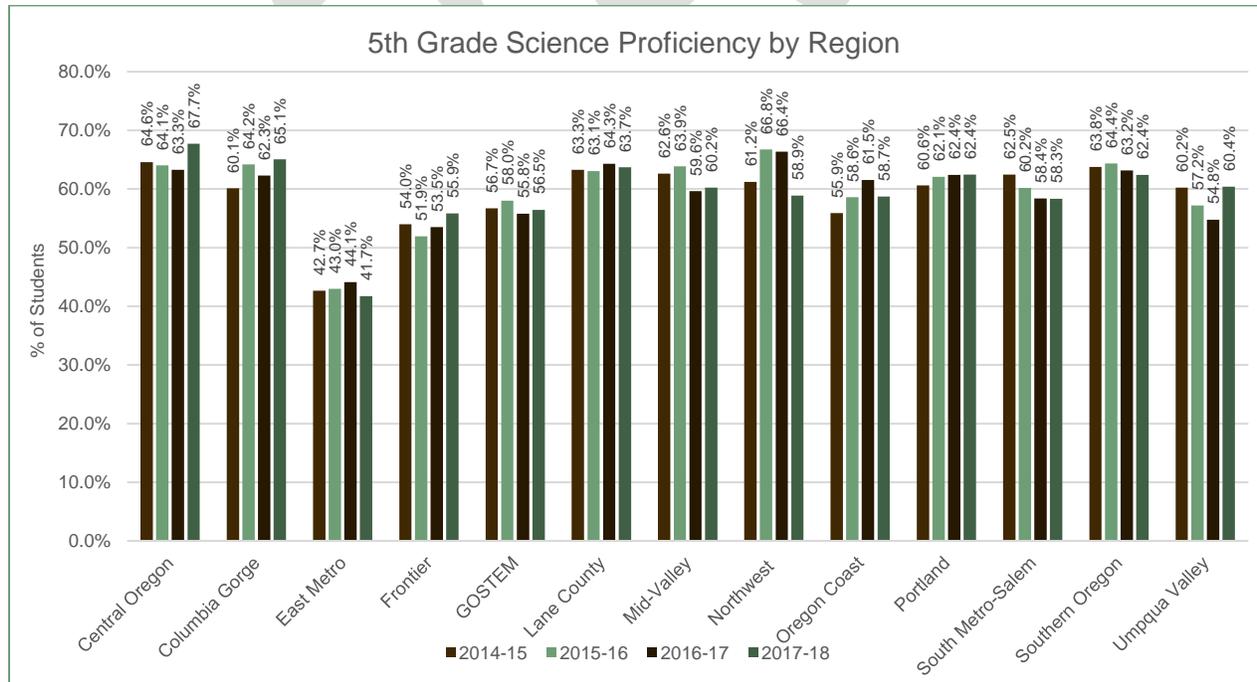


## 5TH GRADE SCIENCE PROFICIENCY<sup>16</sup>

**Chart 18**

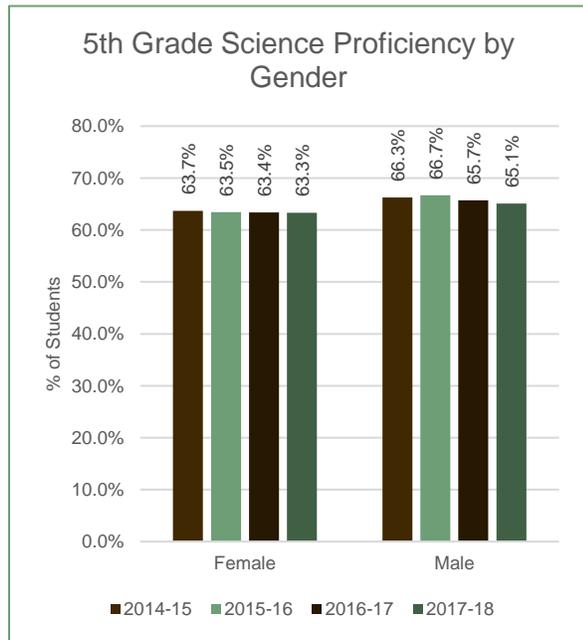


**Chart 19**

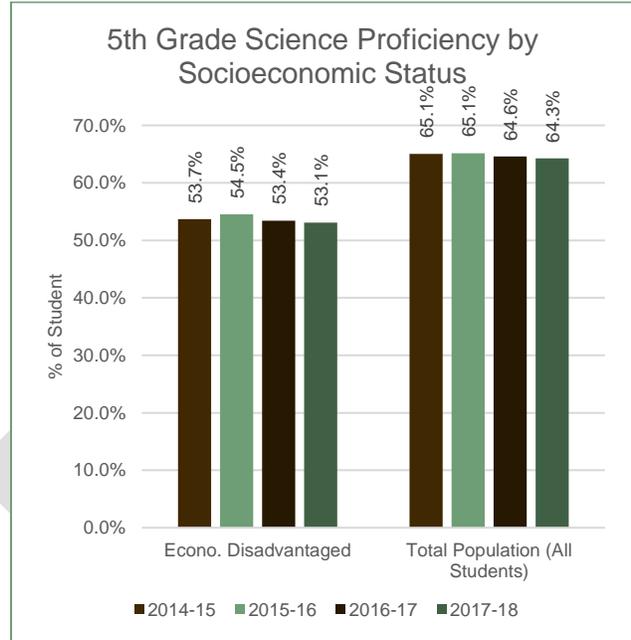


<sup>16</sup> Oregon Department of Education, <https://www.oregon.gov/ode/educator-resources/assessment/Pages/Assessment-Group-Reports.aspx>

**Chart 20**

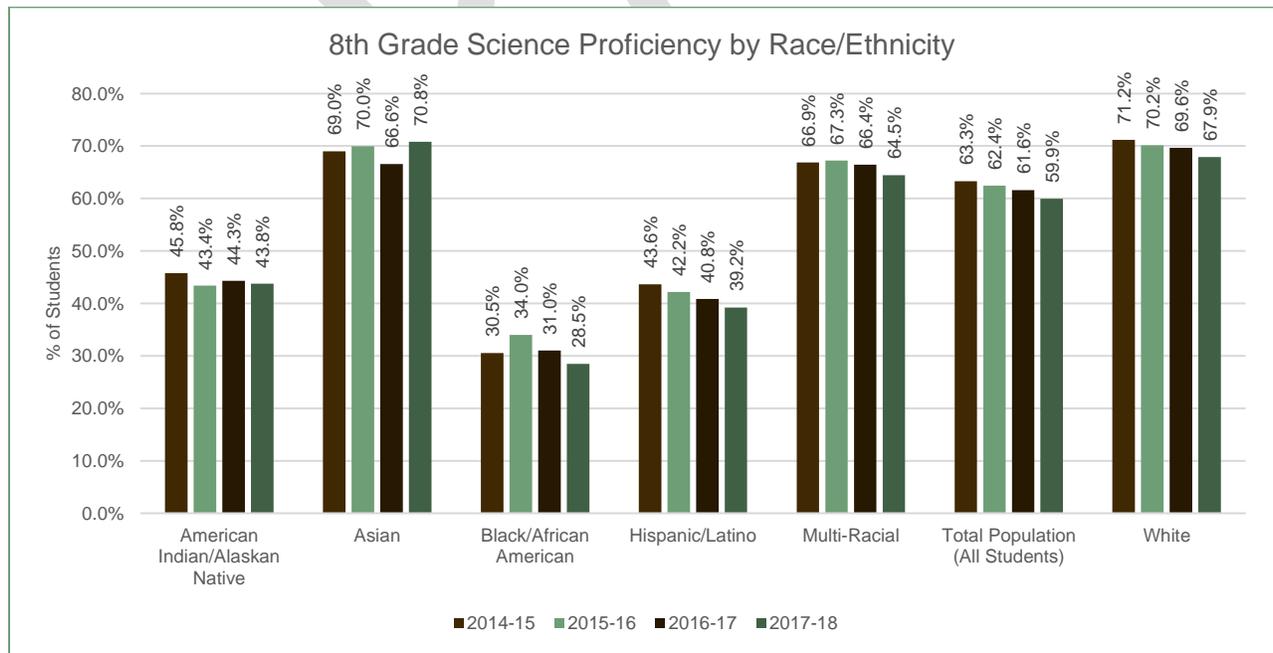


**Chart 21**



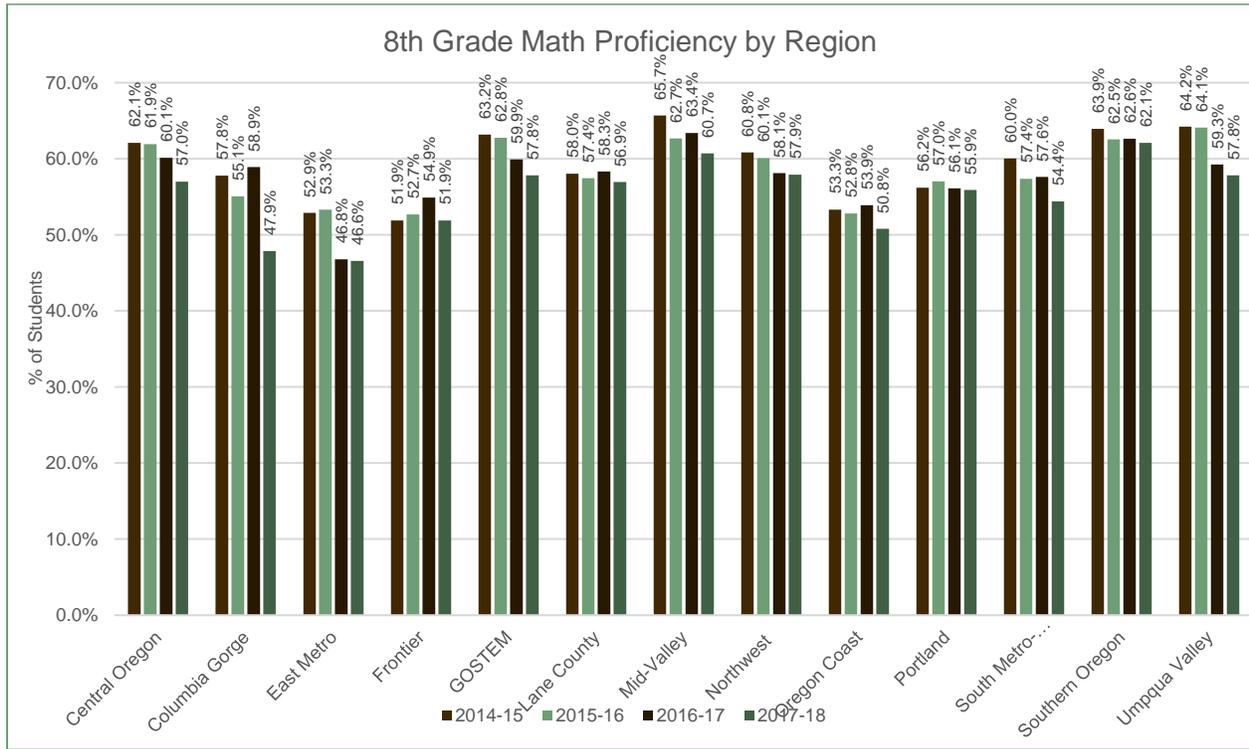
**8TH GRADE SCIENCE PROFICIENCY<sup>17</sup>**

**Chart 22**

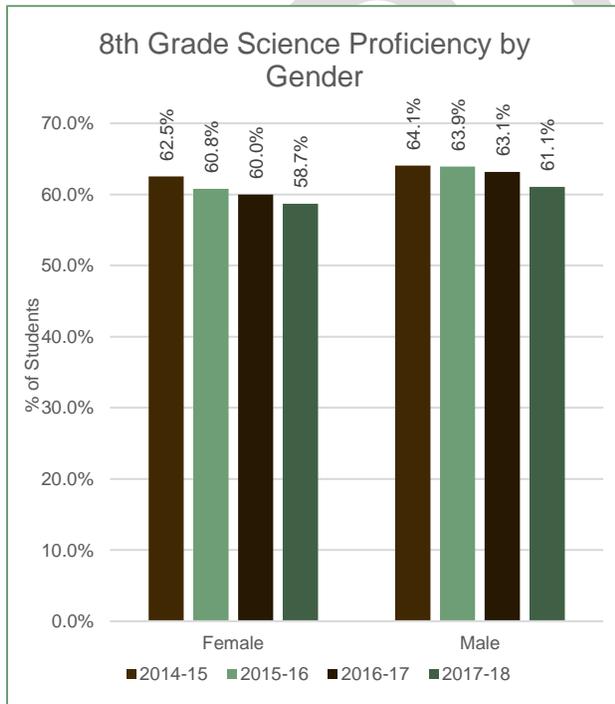


<sup>17</sup> Oregon Department of Education, <https://www.oregon.gov/ode/educator-resources/assessment/Pages/Assessment-Group-Reports.aspx>

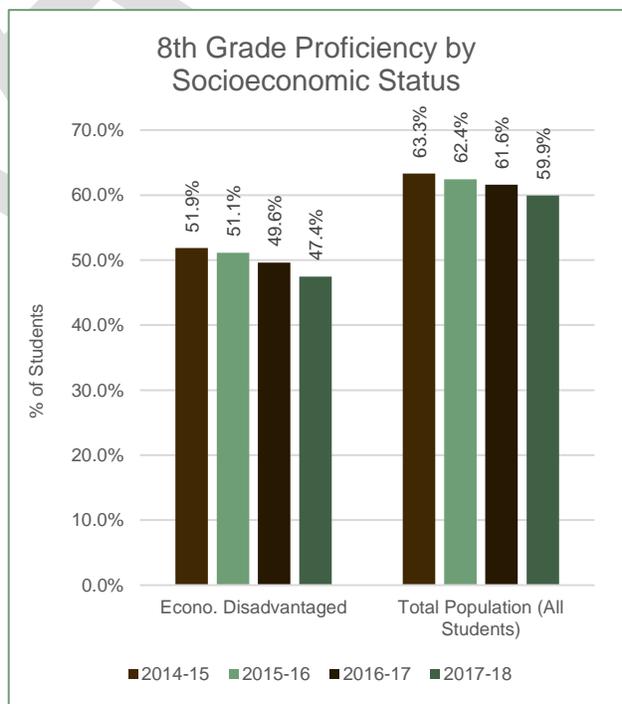
**Chart 23**



**Chart 24**

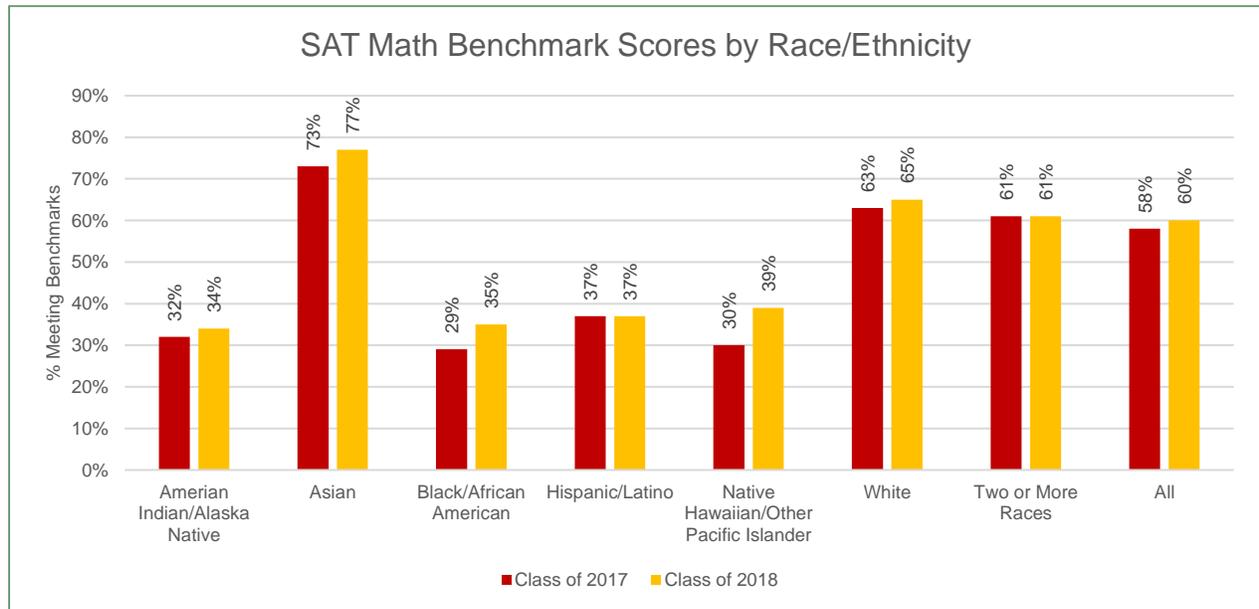


**Chart 25**

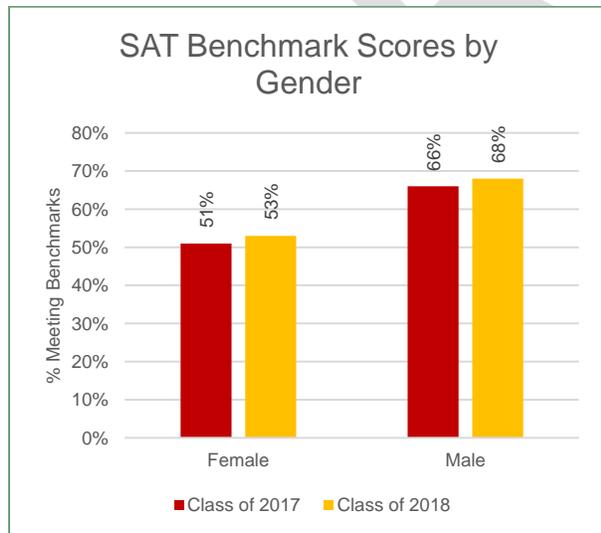


**PERFORMANCE ON AP<sup>18</sup>, ACT<sup>19</sup>, AND SAT STEM TESTS<sup>20</sup>**

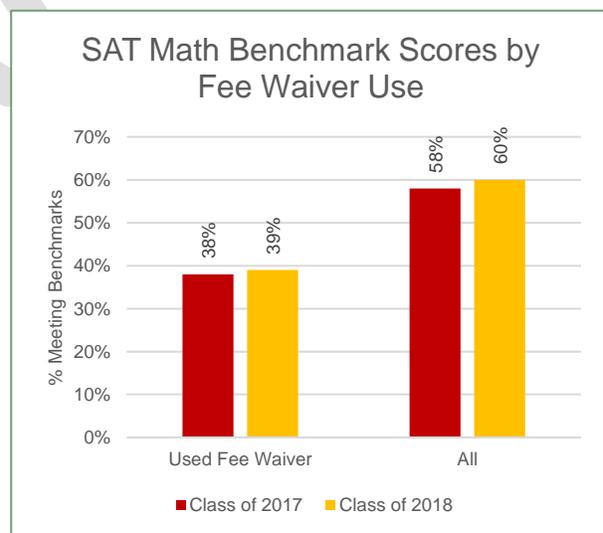
**Chart 26**



**Chart 27**



**Chart 28**

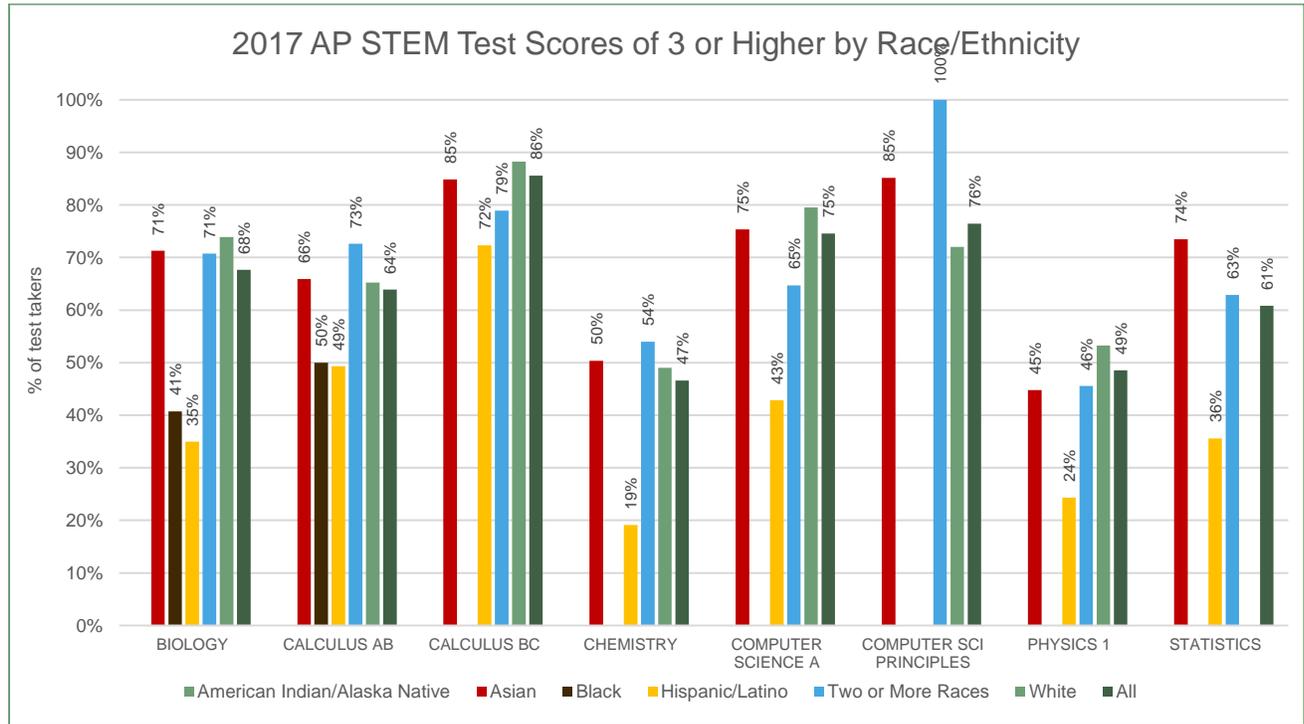


<sup>18</sup> College Board, <https://secure-media.collegeboard.org/digitalServices/misc/ap/oregon-summary-2017.xlsx> and <https://secure-media.collegeboard.org/digitalServices/misc/ap/oregon-summary-2018.xlsx>

<sup>19</sup> [http://www.act.org/content/dam/act/unsecured/documents/STEM2016\\_38\\_Oregon.pdf](http://www.act.org/content/dam/act/unsecured/documents/STEM2016_38_Oregon.pdf)

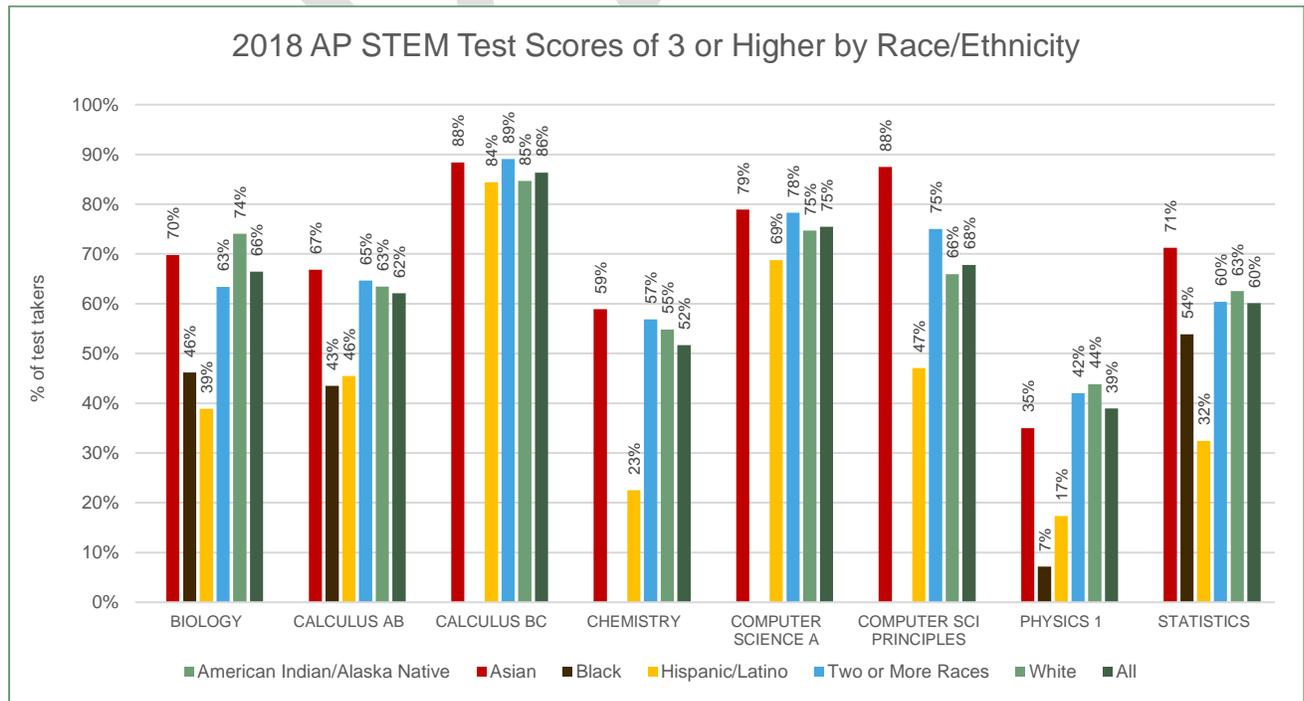
<sup>20</sup> College Board, <https://reports.collegeboard.org/pdf/2017-oregon-sat-suite-assessments-annual-report.pdf> and College Board, <https://reports.collegeboard.org/pdf/2018-oregon-sat-suite-assessments-annual-report.pdf>

**Chart 29**



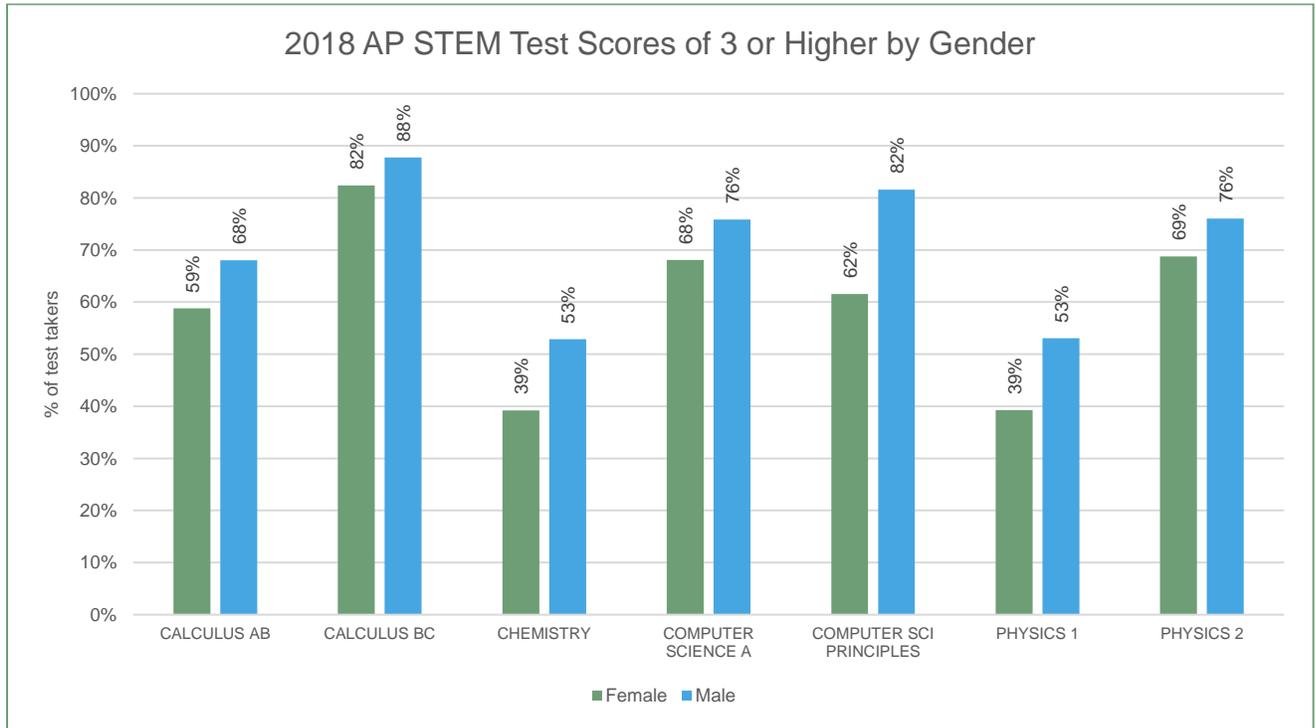
*Note: student groups with less than 10 test takers were excluded*

**Chart 30**

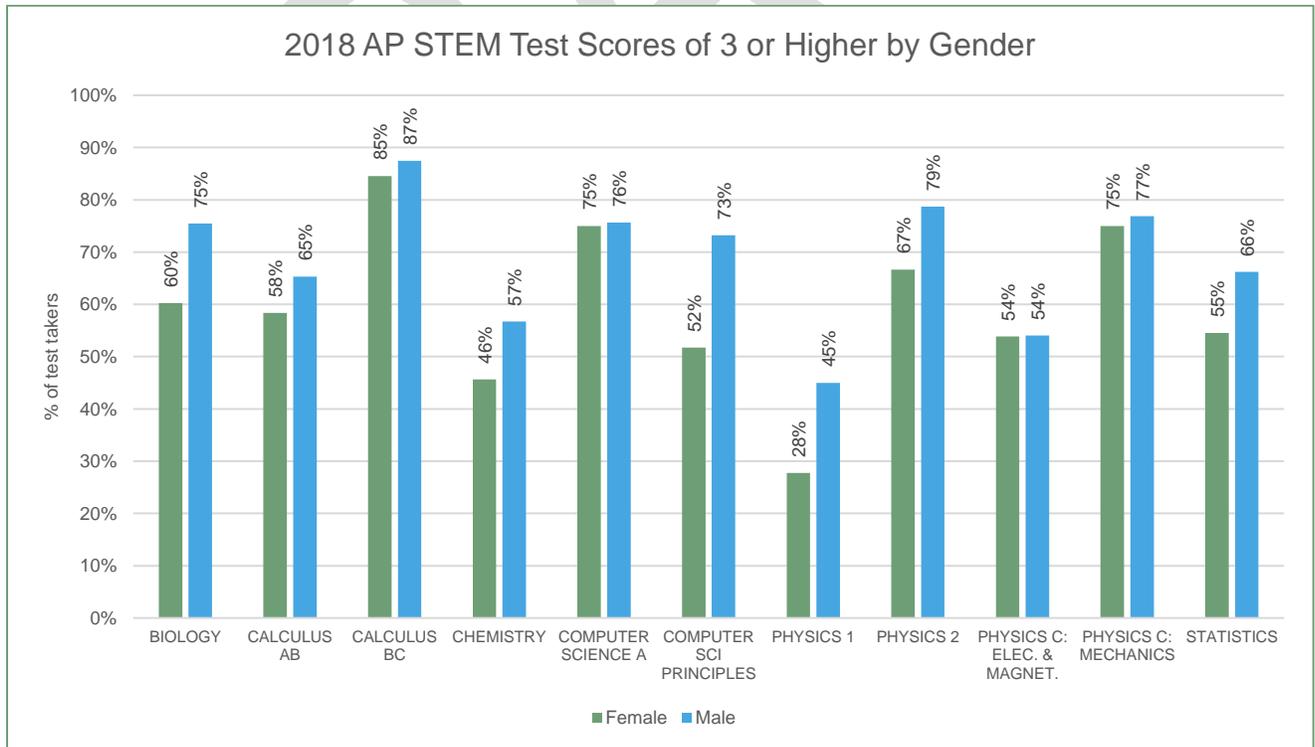


*Note: student groups with less than 10 test takers were excluded*

**Chart 31**



**Chart 32**



# APPENDIX B: REGIONAL STEM HUB FACT SHEETS

## 1. EAST METRO STEAM PARTNERSHIP

[Each Hub will have a 2-page summary/fact sheet]



# East Metro STEAM Partnership: 2017-2019

## Summary

The vision of the East Metro STEAM Partnership is an East Multnomah County community where children, youth, and adults have equitable access to and are engaged in Science, Technology, Engineering, Art, and Math (STEAM) learning that results in a skilled workforce and increased economic opportunity. EMSP focuses on the Eastern part of Multnomah County, a region representing 5 school districts, 43,000 students, 2,000 teachers, and the most diverse and economically challenged residents in the state of Oregon. Incomes are 68% higher in West Portland than East Portland and more than three times as many people hold college degrees in the west compared to the eastern part of the metropolitan area, according to the 2016 US Census, American Community Survey.

EMSP is governed by a Leadership Team consisting of community leaders in education, the trades, industry, and community organizations. At the direction of the Leadership Team, the Director convenes 50+ partners every other month, conducts an annual needs assessment, and serves as the point of contact for the region’s STEAM efforts. In a distributed leadership model, five action teams comprised of committed partners (see image below), work together to move the region toward EMSP’s vision.



## Impact Data

- 148 educators received a total of 1,362 professional development hours, reaching an estimate of 28,245 students as a result.
- 625 students participated in EMSP-supported or EMSP-funded programs, resulting in 21,419 hours of STEAM.

## Selected Initiatives

### STEM Leadership Academy for Administrators [State STEM Plan Goal Areas 1-4]

- 10-month learning opportunity for elementary building principals and their supervisors to deepen their understanding of STEM teaching & learning, effective leadership models that support high academic achievement, and tools & resources to support their role.
- 22 administrators across six districts, served by three STEM Hubs: PMSP as lead, with support from EMSP and SMSP.
- More info: <http://bit.ly/STEM-leadership-academy>

### Pockets of Innovation [State STEM Plan Goal Areas 1-3]

- Funded 15 projects in 2017 and an additional 5 projects in 2018 with the purpose of raising awareness around current STEAM projects in the region.
- In 2017, an [evaluation](#) was completed by NPC Research, and MetroEast Community Media created [three videos](#) highlighting the projects, closed captioned in three languages.
- More info: <https://eastmetrosteam.org/pockets-of-innovation/>

### Industry for a Day [State STEM Plan Goal Areas 1-3]

- In 2018, in collaboration with All Hands Raised, Worksystems, and Impact NW over 200 educators visited 38 industry sites and experienced firsthand what jobs are available in the east metro area as well as what employers are looking for.
- Information from companies was compiled into a [Company Overview Booklet](#). Attendees also indicated which actions they would follow up on over the course of the school year.

### STEM Beyond School [State STEM Plan Goal Areas 1-3]

- Each site serves 30 or more youth in grades 3-8 for at least 50 student hours. At least 70% of students are underserved. Staff at each site participates in 70 professional development hours.
- Metropolitan Family Services hosts a site through its SUN School at West Powellhurst Elementary (David Douglas School District).
- Saturday Academy hosts a site through a winter and spring class at three locations: Hall Elementary School (Gresham-Barlow School District), Woodland Elementary School (Reynolds School District), and Walt Morey Middle School (Reynolds School District) as well as a spring break camp at Mt. Hood Community College.

### Youth in STEAM Communications [State STEM Plan Goal Area 1]

- Collaboration in which Center for Advanced Learning digital media and design students set the strategy and creation of EMSP communications materials through paid internships at Lewis Creative and MetroEast Community Media
- In 2018, six student interns produced a [promo video](#), [STEAM banners](#), social media messages based on major audience profiles and a [content strategy](#).
- In 2019, additional students will develop a photojournalism project, a brochure, motion graphics based on the films, and a passport for STEAM activities in the region.

### Youth Advisory Council [State STEM Plan Goal Area 1]

- Youth Advisory Councils have taken place twice per year since spring 2017, engaging up to 15 youth age 13-20 from throughout the East Metro region, paying them to influence their peers by spreading information and activities about STEAM in their schools and community.
- More info: <https://eastmetrosteam.org/youth-advisory-council/>

## APPENDIX C: STEM INNOVATION GRANT FACT SHEETS

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### Oregon Mathways Initiative

#### *Math in Real Life (MiRL)*

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#### Background

Math in Real Life (MiRL) supports the expansion of regional networks to create an environment of innovation in math teaching and learning. The focus on applied mathematics supports the natural interconnectedness of math to other disciplines while infusing relevance for students. MiRL supports a limited number of networked math learning communities that focus on developing and testing applied problems in mathematics. The networks help math teachers refine innovative teaching strategies with the guidance of regional partners and the Oregon Department of Education.

There are four categories of outcomes related to this project.

- Student mathematics content knowledge:
  - Increase student mathematics achievement aligned to Oregon standards through implementation of applied mathematics problems.
  - Decrease the mathematics achievement gap between historically underserved students and their peers through implementation of applied mathematics problems.
- Student attitudes and beliefs that are correlated to higher achievement:
  - Increase student interest and enthusiasm in math by providing more opportunities to engage in interactive, student-centered problems that are based in applied mathematics.
- Teacher instructional practices:
  - Increase pedagogical preparedness of teachers to successfully implement inquiry-based practices within applied mathematics instruction.
  - Increase teacher knowledge of the application of mathematics.
- Teacher attitudes and beliefs about themselves and students:
  - Increase teacher enthusiasm and self-efficacy for mathematics to stimulate inclusion of more challenging open-ended applied mathematics activities within instruction.
  - Increase teacher beliefs that *all* their students are capable of doing mathematics.

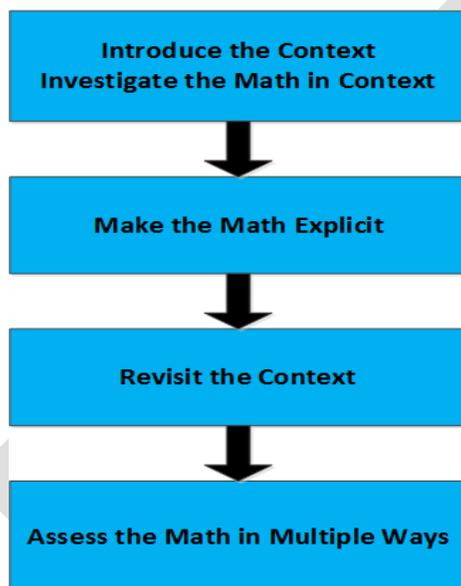
#### Identifying Rich Context

At the center of MiRL identification of a context that has potential for exploring rich mathematical content. Math teachers connect with context experts either in the school or in the community. By

interacting with these experts, math teachers are able to identify the potential connections to mathematics and applicability to grade-level expectations.

### Purposeful Connection

Application of mathematics does not insure improvements in student understanding. Teachers have to help students make connections between context and content. Each MiRL lesson uses an approach sandwiches explicit teaching of relevant math content between uses of that content in context (Figure 1). A MiRL lesson starts with the context, makes a case for needing mathematics, addresses key mathematical concepts, and returns to context for assessment and transfer. The model is described in materials available through the link in the resources section.



**FIGURE 1 - DIAGRAM SHOWS THE RELATIONSHIP BETWEEN CONTEXT AND EXPLICIT MATH IN A CONTEXTUAL MATH LESSON.**

### Learning Communities

Teachers who have experienced MiRL lesson development find the process much more challenging than more familiar lesson planning. The context is often unfamiliar at first. Students are used to solving problems using simple algorithms and single types of mathematics. MiRL uses a learning community structure where teachers co-develop lessons, teach those lessons, and refine lessons based on their experience teaching.

### Resources

[Oregon Educator Network Math in Real Life](#)

### Contact

Mark Freed – [Mark.Freed@ode.state.or.us](mailto:Mark.Freed@ode.state.or.us)

**Grant Recipient: Oregon Computer Science Teachers Association**  
**Grant Amount: \$750,000 for current biennium (for 2 program years)**

**Purpose**

The Digital Literacy and Computer Science Grant provided an opportunity for Oregon schools to expand their computer science offerings through two pathways, the SuperQuest educator training and a SuperQuest Spring Conference. It has also significantly aligned state efforts to national initiatives. Strength of the grantee include the extensive network and partnership capacity OCSTA has built statewide.

Goal 1: Increase Number of students with access to quality CS in K-12 classrooms and increase participation.	Goal 2: Support district plans to deliver CS	Goal 3: Connect teachers and administrators to funds/supports
Increase in CS courses in K-12 schools (increases in both computer programming and AP Computer Science courses)	Support local development of CS education plans through collaboration with districts and national K-12 SC Framework (Facilitated the development of a CS statewide workgroup who have collaboratively created the CS for Oregon Plan based on national CS frameworks and standards. This included a scope and sequence protocol)	Administrator Guide developed for district leaders developed via an advisory group consisting of industry, education and LEA leaders  Planning a series of administrator sessions to better educate and address lack of administrator support
Increase number of K-12 CS teachers (Professional Development attendance increase, due to refundable deposit upon attendance)	Provide a plan as model for other districts ("CS Playbook" provides assistance for districts to develop short-term strategies for including computer science education while laying groundwork for long-term)	
Increase students of color and women in CS ("CS Playbook" clearly addresses equity and increased access to underrepresented students in the computer science field)		

*The CTE brand logo, brand positioning theme and brand extensions are the property of NASDCTEC.*

### By the Numbers (17-18 School Year)

- Number of professional development opportunities held throughout the state: one SuperQuest Spring Conference and 8 three-day SuperQuest workshops
- Number of AP Computer Science courses: 36 (three-fold increase)
- Number of computer programming teachers: 118 (up from 84 last year)
- Number of educators participating in the 2018 SuperQuest Trainings: 283
- Number of students reached (estimated): 9,563

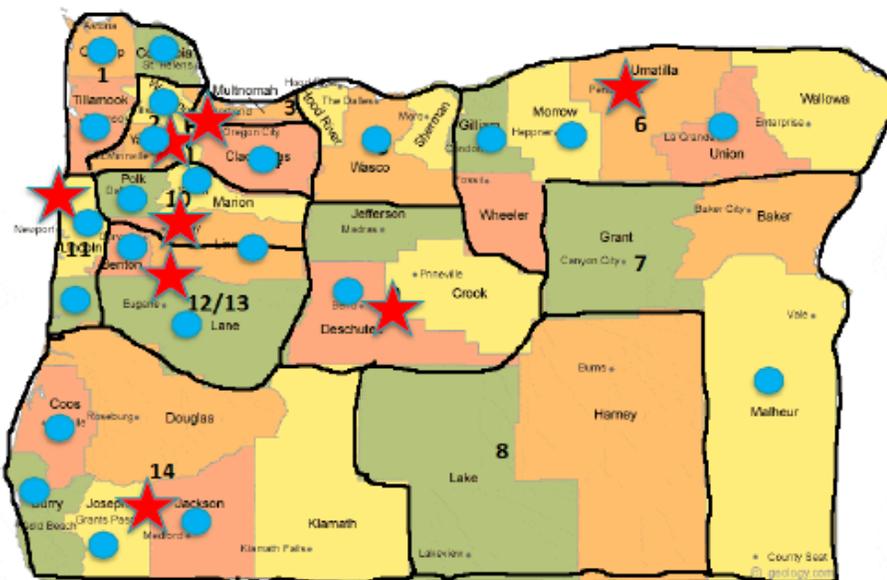
### Geographic Distribution of Professional Development



SuperQuest 2018 Professional Development Sites



Educator attendance by County



### Contact

Deborah Bailey

(503) 947-0046

Deborah.bailey@state.or.us

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## Purpose

To expand STEM opportunities and student STEM interest, motivation and enthusiasm in STEM-related activities and careers among historically-underserved students in grades 3-8 by supporting high-quality out-of-school STEM programming, professional development and a statewide network for community-based out-of-school-time providers. Specifically the outcomes of the grant are to:

- Increase or maintain student STEM identity and motivation resilience in STEM-related activities.
- Ensure that students have opportunities to develop a mindset and confidence to envision their future within STEM careers.
- Increase opportunities for students to engage in interactive student-centered, applied learning.
- Increase out-of-school STEM programming to historically underserved student populations (grades 3-8) in science engineering, and mathematics.
- Develop a statewide network of out-of-school providers to disseminate and implement effective practices, ideas and resources for STEM-related education.
- Develop baseline data elements to inform size, scope, quality and student outcomes of out-of-school STEM-aligned activities
- Increase opportunities for career-connected learning to ensure students see and believe they have a pathway for achieving a high school diploma and post-high school careers related to STEM.

## By the Numbers (17-18 School Year)

- Grant Recipient: Oregon State University Extension Service
- Amount: \$1.2 Million (Biennium – 2 program years)
- Number of students reached: 907 statewide in 2017-2018 school year
- Number of STEM program hours OFFERED: 3,788
- Percentage of surveyed students that met one or more criteria for underserved/disadvantaged: 87%
- Total hours attained by participating students in grades 3-8: 45,786
- Total Professional Development hours attained by educators: 1174

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## Unforeseen Benefits of the Grant

The STEM Beyond School project was selected as one of only 10 Oregon State University Outreach and Engagement Awards for Excellence in 2018. The Division of University Outreach and Engagement recognizes outstanding projects that significantly advance the mission of outreach and engagement across the university

and throughout Oregon. Awards were presented at the Vice Provost Awards for Excellence event on May 14, 2018 at the OSU Memorial Union Ballroom.

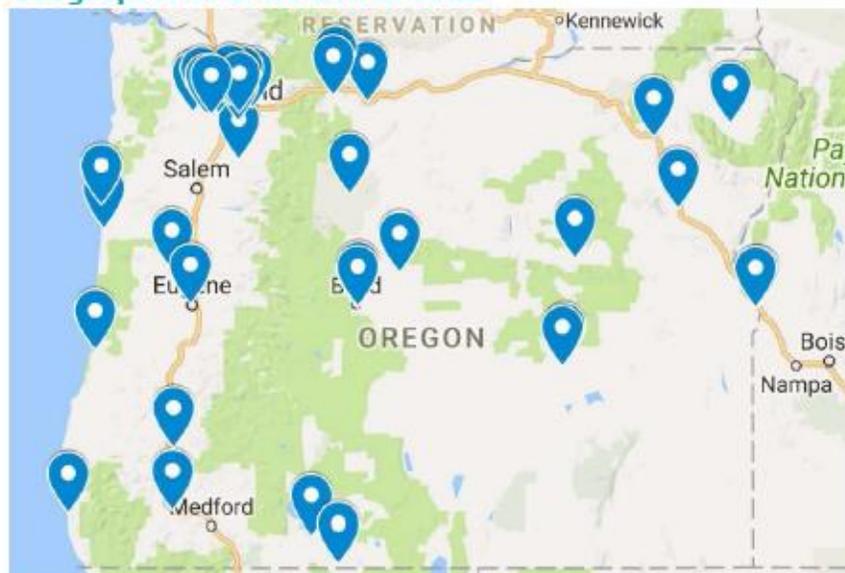
### Overarching Impact

Youth who entered the program with an already strong science interest and identity maintained their strong interest and identity, while youth who entered with a lower rating demonstrated significant increases in identity-related outcomes across all six measures.

Individual program quality is described by the evaluation report as “diverse, engaging and highly interactive” (p.2) with most programs engaging students in two or more NGSS practices and the majority of programs adopting two of the 4 Core Programming Practices: Students as Do’ers & Designers and Youth Interests Drive Programming. Programs involved in the SBS project provided a wide range of opportunities for youth to engage in interactive, student-centered, applied learning, particularly in the Math and Science/Engineering content that is aligned to NGSS practices.

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### Geographic Distribution of Sites



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### Contact

Deborah Bailey

(503) 947-0046

Deborah.bailey@state.or.us



# Do's and Don'ts of Oregon Government Ethics law



**Tammy Hedrick**  
**Oregon Government Ethics Commission**

# Introduction

## Oregon Government Ethics Commission

- Enacted by voters in 1974
- 9 Members + Staff
- Agency Jurisdiction:
  - Oregon Government Ethics law - ORS Chapter 244
  - Lobby Regulation law - ORS Chapter 171
  - Executive Session provisions of Public Meetings law - ORS Chapter 192

# Objectives

Understand how the Oregon Government Ethics laws apply:

- ✓ Limits on financial benefits
- ✓ Limits on private and subsequent employment
- ✓ How to handle conflicts of interest
- ✓ Gifts
- ✓ Nepotism

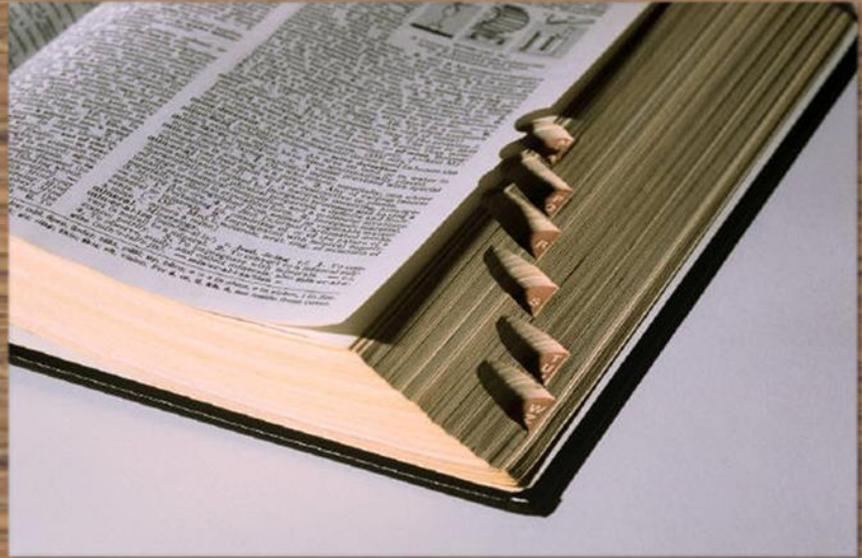
Awareness of where to find resources or direct assistance for Government Ethics issues

# SAFEGUARD OF THE PUBLIC TRUST

“The Legislative Assembly declares that service as a public official is a public trust, and that as one safeguard for that trust, the people require all public officials to comply with the applicable provisions of this chapter.” [ORS 244.010 (1)]



# Definitions



- Who is a **“Public Official”**?
- Who is a **“Relative”** of a public official?
- Who is a **“Member of the Household”** of a public official?
- What is a **“Business’ with which the person is Associated”**?

# Who is a “Public Official”?

## ORS 244.020(15)

Any person who is **serving the State of Oregon** or any of its political subdivisions or any other public body, **as an elected official, appointed official, employee, agent or otherwise, irrespective of whether the person is compensated** for the service.



# Who is a “Relative”? ORS 244.020(16)

- A public official's
  - *Spouse*
  - *Child, son or daughter-in-law*
  - *Parent, including stepparent*
  - *Sibling, including stepsibling*

*-Same members of the public official's spouse's family*
- Anyone for whom the public official has a *legal support obligation*
- Anyone receiving *benefits* of the public official's public employment
- Anyone from whom the *public official* receives a *benefit* of employment



# Who is a **“Member of the Household”**?

## ORS 244.020(11)

Any person who resides with the public official.



# What is a “**Business**”? ORS 244.020(2)

- **Any** corporation, partnership, proprietorship, firm, enterprise, franchise, association, organization, self-employed individual and any other **legal entity operated for economic gain.**
- **NOT:**
  - **Public Body.**
  - Tax-exempt 501(c)(3) **non-profit** (*if* the public official or relative is associated only as a ***member, board director, or other unpaid position***).

# A **Business Association?**

## ORS 244.020(3)

“Associated with” a ***private business*** or ***closely held corporation*** if, a person or the person’s relative:

- Is a **director, officer, owner, employee, or agent**; *OR*
- Owned **\$1000+** in stock, equity interest, stock options, or debt interest during the **preceding calendar year**.

“Associated with” a ***publicly held corporation*** if, a person or the person’s relative:

- Is an **officer or director**; *OR*
- Owned **\$100,000+** in stock, equity interest, stock options, or debt interest during the **preceding calendar year**.



# Financial Benefits

# Prohibited Use Of Office

## ORS 244.040(1)

Public official may not use or attempt use position or office to obtain financial gain or avoid a financial detriment for:

- the public official, a relative or household member, or any business with which any are associated, IF:
- the financial gain or avoidance of detriment would not be available **but for** the public official's holding the position or office.

\* *Notwithstanding proper disclosure of conflicts of interest  
(ORS 244.040(7))*

# PROHIBITED USE OF OFFICE

## *Exceptions*

1. Accepting any part of the public official's **official compensation package** (*OAR 199-005-0035(3)*)
2. Receipt of **honoraria** or other items under ORS 244.042 (*limit \$50 max*)
3. **Reimbursements** (*OAR 199-005-0035(4)*)
4. **Unsolicited awards** for professional achievement
5. **Gifts** not violating Oregon Government Ethics law
6. **Legal expense trust fund** contributions (*governed by ORS 244.205 – 221*)



# Private Employment

# Use of Office (ORS 244.040) *continued...*

In general, public officials may obtain employment with a private employer or engage in private income-producing activity of their own. However, they:

- Must **not** use the position held as a public official to **create the opportunity** for additional personal income.
- Must **ensure a clear distinction** between use of personal resources and time for personal income-producing activity, and use of the public body's time and resources.



# Employment & Public Contracts

## ORS 244.047

A person who ceases to hold a position as a public official **may not have a direct beneficial financial interest** in a public contract, for **two years** after authorization, **if** the contract was **authorized by**:

- The public official, in their capacity as a public official, OR
- The public body (board, committee, or council) that the public official was a member of when the contract was authorized.
  - ***UNLESS*** the person did not participate in the authorization of the contract.

\* **Authorize** = performing a “significant role” in selecting a contractor or executing the contract; recommending approval; signing the contract.

(OAR 199-005-0035(6))



# Conflicts of Interest

# “Actual” Conflict of Interest

## ORS 244.020(1)

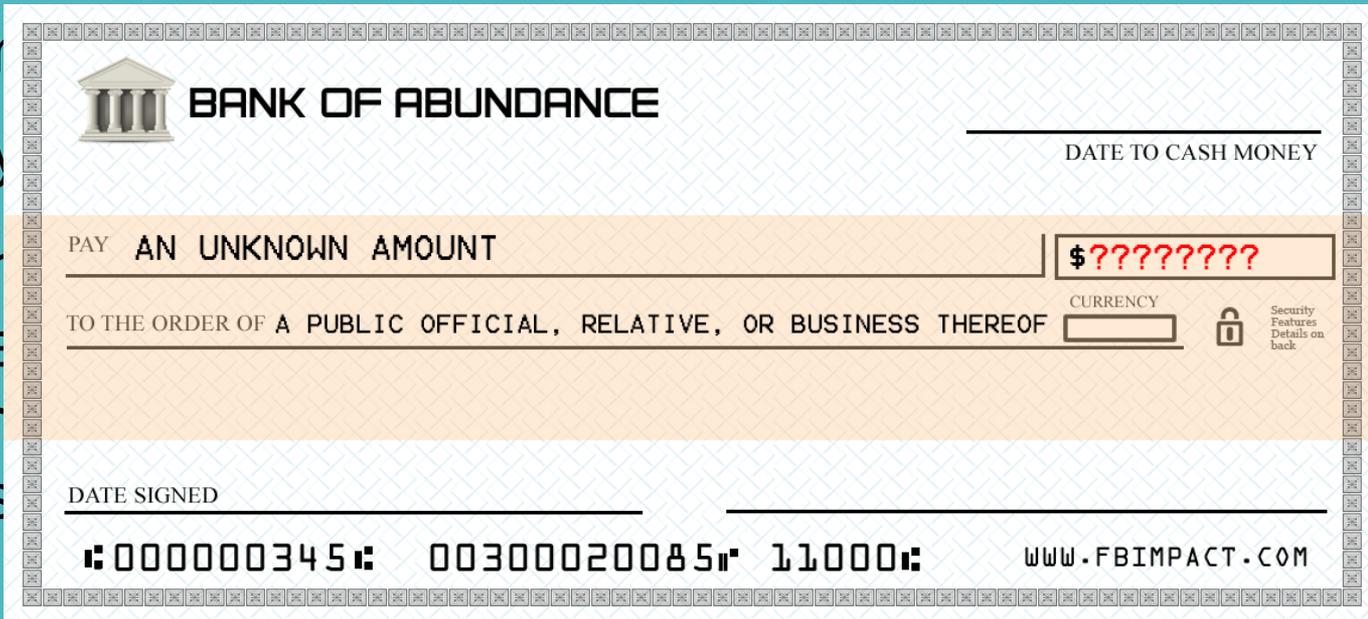
- Any action, decision or recommendation,
- By a person acting in a capacity as a public official,
- That would result in a private financial benefit or detriment to the public official, the public official’s relative or any business with which the public official or relative is associated.

Meaning that the financial effect of the action would occur with certainty.



# “Potential” Conflict of Interest ORS 244.020(13)

- An
- By
- The
- de
- or
- as



Benefit or relative relative is

Meaning that the financial effect of the action is not certain.

What Do I  
Do When  
Met With  
A Conflict  
Of  
Interest?



# Officials on Boards or Commissions & Elected Officials

Must publicly announce the nature of the conflict of interest on each occasion the conflict arises.

- Must publicly announce **potential** conflicts of interest, on each occasion **before taking action**.
- Must publicly announce **actual** conflicts of interest, on each occasion, and **refrain** from participating in **discussion, debate, or voting** on the issue out of which the actual conflict arises.



# Employees & Other Appointed Officials

## ORS 244.120(1)(c)

Must provide **written notice**:

- To the person who appointed or employed you
- Describing the nature of the conflict
- Requesting that the appointing authority or employer dispose of the matter
- On each occasion the conflict of interest is met.



***Recommendation: Maintain a copy of the notice in your own records.***

# The Public Body's Response To Notices Of Conflict

For **ALL public officials** providing notice of conflict:

- The notice must be recorded in the official records of the public body. [ORS 244.130]



For those who provide **written notice**:

- **Supervisor or appointing authority** must respond to:
  - Assign someone else to the task, **OR**
  - Instruct the employee on how to proceed with the matter. [ORS 244.120(1)(c)]





**Gifts**

# What is a “gift”? ORS 244.020(7)

- Something of economic value
- Given to a public official, or public official’s relative or household member
- Without payment or other consideration
- That is **not offered to others** who are not public officials, their relatives or household members, **on the same terms and conditions.**



# Gift Limit ORS 244.025

During a calendar year, a public official or a relative or member of the household of the public official may **NOT**:

- Solicit or Receive
- Directly or Indirectly

Calendar 2016

Bank holidays 2016 (UK)

1st January	28th March	Easter Monday	30th May	Spring Bank Holiday	26th December	Christmas Day
29th March	Good Friday	Early May Bank Holiday	29th August	August Bank Holiday	27th December	Boxing Day

Any gift(s) with an aggregate value exceeding **\$50** from any single source reasonably known to have a legislative or administrative interest.

What is **NOT** a “gift”?



*Items Expressly  
Excluded From  
The Definition Of  
“Gift” In ORS  
244.020(7)(b)  
May Be Accepted  
Without Limit.*



## Relatives

*ORS 244.020(16)*

## Household members

*ORS 244.020(11)*

# Nepotism

# Employing a Relative/Household Member ORS 244.177

A public official may not directly:

- Appoint
- Employ
- Promote
- Discharge
- Fire
- Demote



*Without first complying with the Conflict of Interest requirements (...which usually requires refraining).*

# Nepotism cont'd...

A public official may not participate *in any interview, discussion or debate* to:

- Appoint
- Employ
- Promote
- Discharge
- Fire
- Demote



*“Participate” IS NOT providing a reference, recommendation, or ministerial acts that are part of your regular job function*

# Exception For Unpaid Volunteers

If the relative or household member is an unpaid volunteer, nepotism rules do not apply.

The **public official may supervise and participate in any personnel action involving the person.**

- \* **Unless** it's an unpaid position as a member of a governing body (i.e., board, commission, or council member)



(ORS 244.177(3) & 244.179(3))



# Agency Resources

- ***Requests for guidance***
  - ***Written (Staff Advice, Staff Op., Advisory Op.)***
  - ***Telephone***
  - ***In-person***
- ***Review previously issued guidance***
- ***Trainings (in-person, webinars, iLinc)***
- ***Public records***
- ***Electronic forms***

# ***THANK YOU!***

## **OREGON GOVERNMENT ETHICS COMMISSION**

**3218 Pringle Rd. SE Suite 220**

**Salem, OR 97302-1544**

**Email: [ogec.mail@Oregon.gov](mailto:ogec.mail@Oregon.gov)**

**Phone: (503) 378 – 5105**

**Fax: (503) 373 – 1456**

**Web: <http://www.oregon.gov/OGEC/>**

Trainer: Tammy Hedrick

Email: [tammy.r.hedrick@oregon.gov](mailto:tammy.r.hedrick@oregon.gov)

Phone: 503-378-6802

# Oregon Government Ethics Law



Oregon Government Ethics Commission  
3218 Pringle Rd. SE, Suite 220  
Salem, OR 97302-1544  
Telephone: 503-378-5105  
Fax: 503-373-1456  
Web address: [www.oregon.gov/ogec](http://www.oregon.gov/ogec)

## **About the Commission**

The Oregon Government Ethics Commission (OGEC), established by vote of the people in 1974, is a nine-member citizen commission charged with enforcing government ethics laws.

Oregon government ethics laws prohibit public officials from using their office or position for personal financial gain, and require public disclosure of economic conflict of interest. The OGEC also enforces state laws that require lobbyists and the entities they represent to register and quarterly report their expenditures. The third area of OGEC jurisdiction is the executive session provisions of public meetings law.

## **Am I a “public official”?**

The answer is yes if you are serving the State of Oregon or any of its political subdivisions or any other public body, as an elected official, appointed official, employee, agent or otherwise, irrespective of whether you are compensated for services [ORS 244.020(15)].

## **What you need to know if you are a public official:**

The provisions in Oregon Government Ethics law restrict some choices, decisions or actions a public official may make. The restrictions placed on public officials are different than those placed on private citizens because service as a public office is a public trust and provisions in ORS Chapter 244 were enacted to provide one safeguard for that trust. [ORS 244.010(1)]

- Public officials are prohibited from using or attempting to use their positions to gain a financial benefit or to avoid a financial cost for themselves, a relative, or their businesses if the opportunity is available only because of the position held by the public official [ORS 244.040(1)].
- There are conditions that must be met before a public official may accept a gift and in some cases, there are limits on the value of gifts that can be accepted. Certain public officials are required to file reports that disclose some of the gifts accepted and the specific economic interests.
- When met with a conflict of interest, a public official must follow specific procedures to disclose the nature of the conflict. There are also restrictions on certain types of employment subsequent to public employment and on nepotism.

This handout will discuss how the provisions in ORS Chapter 244 apply to public officials and will summarize Commission procedures. It should be used in conjunction with applicable statutes and rules. This guide should not be used as a substitute for a review of the specific statutes and rules.

You will find links to ORS Chapter 244, and relevant Oregon Administrative Rules (OAR), and other publications referenced in this guide on the Commission's website at [www.oregon.gov/ogec](http://www.oregon.gov/ogec). Questions or comments may be submitted to the Commission by email at [ogec.mail@state.or.us](mailto:ogec.mail@state.or.us), by Fax to 503-373-1456 or by telephone to 503-378-5105.

### **Are you a public official?**

"Public official" is defined in ORS 244.020(15) as any person who, when an alleged violation of this chapter occurs, is serving the State of Oregon or any of its political subdivisions or any other public body as defined in ORS 174.109 as an elected official, appointed official, employee or agent, irrespective of whether the person is compensated for the services.

There are approximately 200,000 public officials in Oregon. You are a public official if you are:

- Elected or appointed to an office or position with a state, county or city government.
- Elected or appointed to an office or position with a special district.
- An employee of a state, county or city agency or special district.
- An unpaid volunteer for a state, county or city agency or special district.
- Anyone serving the State of Oregon or any of its political subdivisions, such as the State Accident Insurance Fund or the Oregon Health Sciences University.

"As defined in ORS 244.020(15), a public official includes anyone serving the State of Oregon or any of its political subdivisions or any other public body in any of the listed capacities, including as an "agent." An "agent" means any individual performing governmental functions. Governmental functions are services provided on behalf of the government as distinguished from services provided to the government. This may include private contractors and volunteers, depending on the circumstances. This term shall be interpreted to be consistent with Attorney General Opinion No. 8214 (1990)." The Commission has adopted, by rule, additional language used to clarify the use of "agent" in the definition of "public official" in the following OAR 199-005-0035(7).

**My position as a \_\_\_\_\_ defines me as a public official.**



## What does a public official need to know about relatives?

Public officials need to know how Oregon Government Ethics law defines who is a “relative”. While a public official should exercise sound judgment when participating in actions that could result in personal financial benefits, a public official should also exercise sound judgment when participating in actions could result in financial benefits for a relative.

There are provisions in ORS Chapter 244 that restrict or prohibit a public official from using actions of the position held to benefit a relative; or may limit the value of financial benefits accepted by a relative of the public official or may require the public official to disclose the nature of a conflict of interest when a relative may receive a financial benefit.

In everyday conversation the use of “relative” is applied to a broader spectrum of individuals with “family ties” than those defined as relatives in ORS 244.020(16). In general, when a provision in ORS Chapter 244 refers to “relative” it means one of the following:

- The spouse, parent, stepparent, child, sibling, stepsibling, son-in-law or daughter-in-law of the public official or candidate
- The parent, stepparent, child, sibling, stepsibling, son-in-law or daughter-in-law of the spouse of the public official or candidate
- Person for whom the public official or candidate have a legal support obligation
- Person benefiting from a public official when benefits are from the public official's public employment
- Person who benefits a public official or candidate when benefits are from the person's employment

I have approximately \_\_\_\_\_ relatives as defined by statute.



ORS Chapter 244 does address the issue of nepotism. Nepotism, as used in ORS Chapter 244, is based on the relative relationship, as well as other members of the public official's household. Changes to Oregon Government Ethics law passed by the 2013 Legislative Assembly mean that the definitions for “relative” in ORS 244.020(16), and “member of household” in ORS 244.020(11), now apply to these nepotism regulations as well.

**If I am a volunteer, does that make me a public official?**

If the position for which you have volunteered serves the State of Oregon or any of its political subdivisions or any other public body, “irrespective of whether” you are “compensated” you are a public official.

Volunteers may be elected, appointed or selected by the government agency or public body to hold a position or office or to provide services.

Among the public officials who volunteer are elected or appointed members of governing bodies of state boards or commissions, city councils, planning commissions, fire districts, school districts and many others. There are also many who apply and are selected to perform duties for a government agency, board or commission without compensation, such as fire fighters, reserve law enforcement officers and parks or recreation staff members.

The Commission recognizes that there are many who volunteer to work without compensation for many state and local government agencies, boards, commissions and special districts.

I am a \_\_\_\_\_ volunteer.



## **Financial Gain**

### **What are the provisions in the law that prohibits a public official from using the position or office held for financial gain?**

Public officials become public officials through employment, appointment, election or volunteering. ORS 244.040(1) prohibits every public official from using or attempting to use the position held as a public official to obtain a financial benefit, if the opportunity for the financial benefit would not otherwise be available **but for** the position held by the public official. The financial benefit prohibited can be either an opportunity for gain or to avoid an expense.

Not only is a public official prohibited from using the position as a public official to receive certain financial benefits, but the public official is prohibited from using or attempting to use the position as a public official to obtain financial benefits for a relative or a member of the public official's household. Also prohibited is the use or attempted use of the public official position to obtain financial benefits for a business with which either the public official, a relative or a member of the public official's household are associated.

Public officials often have access to or manage information that is confidential and not available to members of the general public. ORS 244.040(4) specifically prohibits public officials from attempting to use confidential information gained because of the position held or by carrying out assigned duties to further the public official's personal gain. ORS 244.040(5) also prohibits a former public official from attempting to use confidential information for personal gain if that confidential information was obtained while holding the position as a public official, from which access to the confidential information was obtained.

ORS 244.040(6) also has a single provision to address circumstances created when public officials who are members of the governing body of a public body own or are associated with a specific type of business. The type of business is one that may occasionally send a representative of the business who appears before the governing body on behalf of a client for a fee. Public officials who are members of governing bodies and own or are employed by businesses, such as a law, engineering or architectural firms, may encounter circumstances in which this provision may apply.

There a variety of actions that a public official may take or participate in that could constitute the prohibited use or attempted use of the public official position. The use of a position could be voting in a public meeting, placing a signature on a government agency's document, making a recommendation, making a purchase with government agency funds, conducting personal business on a government agency's time or with a government agency's resources [i.e. computers, vehicles, heavy equipment or office machines].

**NOTES:**

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**Are there any circumstances in which a public official may use their position to accept financial benefits that would not otherwise be available but for holding the position as a public official?**

Yes, ORS 244.040(2) provides a list of financial benefits that would not otherwise be available to public officials but for holding the position as a public official. The following financial benefits are not prohibited and may be accepted by a public official and some may also be accepted by a public official's relative or member of the public official's household:

**Official Compensation:** Public officials may accept any financial benefit that is identified by the public body served by the public official as part of the "official compensation package" of the public official. If the public body identifies such salary, health insurance or various paid allowances in the employment agreement or contract of a public official, those financial benefits are part of the "official compensation package" [ORS 244.040(2)(a)].

OAR 199-005-0035(3) provides a definition of "official compensation package:"

An "official compensation package" means the wages and other benefits provided to the public official. To be part of the public official's "official compensation package", the wages and benefits must have been specifically approved by the public body in a formal manner, such as through a union contract, an employment contract, or other adopted personnel policies that apply generally to employees or other public officials. "Official compensation package" also includes the direct payment of a public official's expenses by the public body, in accordance with the public body's policies.

**Reimbursement of Expenses:** A public official may accept payments from the public official's public body as reimbursement for expenses the public official has personally paid while conducting the public body's business [ORS 244.040(2)(c)].

The Commission has provided a definition in OAR 199-005-0035(4): "reimbursement of expenses' means the payment by a public body to a public official serving that public body, of expenses incurred in the conduct of official duties on behalf of the public body. Any such repayment must comply with any applicable laws and policies governing the eligibility of such repayment."



**Honorarium:** Public officials are allowed to accept honorarium by ORS 244.040(2)(b) as it is defined in ORS 244.020(8). A public official must know how honorarium is defined because there are many occasions where someone will offer them a financial benefit and call it an honorarium, but it does not meet the definition of honorarium.

A payment or something of economic value given to a public official in exchange for services provided by the public official is an honorarium when the setting of the economic value has been prevented by custom or propriety. The services provided by a public official may include but not be limited to speeches or other services provided in connection with an event.

**The limitation for honorarium is \$50.**



**Awards for Professional Achievement:** Public officials may accept an award, if the public official has not solicited the award, and the award is offered to recognize an achievement of the public official [ORS 244.040(2)(d)].

Awards for professional achievement should not be confused with awards of appreciation, allowed by ORS 244.020(7)(b)(C), honorarium allowed by ORS 244.040(2)(b) or gifts that are allowed or restricted by other provisions in ORS Chapter 244.

Awards for professional achievement are best illustrated by awards that denote national or international recognition of a public official's achievement. *These awards may also be offered by public or private organizations in the state that are meant to recognize a public official for an achievement.* Professional achievements recognized may be identified as a single accomplishment or an accomplishment achieved during a period of time, such as a calendar year or a public official's career upon retirement. Public officials may be educators, lawyers, certified public accountants or hold a doctorate in some field. These public officials may receive awards recognizing achievements in their fields and those awards would be considered by the Commission to be awards allowed by ORS 244.040(2)(d).



## Gifts

There are occasions when public officials can accept gifts and Oregon Government Ethics law does not limit the quantity or value of gifts, but there are other occasions when the acceptance of gifts is limited to an aggregate value of \$50 from a single source in each calendar year [ORS 244.025].

When Oregon Government Ethics law uses the word “gift” it has the meaning in ORS 244.020(7)(a):

“Gift” means something of economic value given to a public official, a candidate or a relative or member of the household of the public official or candidate:

(a) Without valuable consideration of equivalent value, including the full or partial forgiveness of indebtedness, which is not extended to others who are not public officials or candidates or the relatives or members of the household of public officials or candidates on the same terms and conditions; or

(b) For valuable consideration less than that required from others who are not public officials or candidates.” In other words, a “gift” is something of economic value that is offered to:

- A public official or candidate or to relatives or members of the household of a public official or candidate,
  - Without cost, at a discount or as forgiven debt and,
  - The same offer is not made or available to the general public who are not public officials or candidates.

To know whether gifts from a single source are limited or unlimited you must determine if the decisions or votes of the public official, who is offered a gift, would have a distinct economic impact on the source making the offer. If the source of the offer would receive a financial gain or avoid a financial cost from the decisions or votes of a public official, gifts from that source to that public official would be limited as to the aggregate value of gifts accepted from that source in a calendar year. This economic interest is a pivotal factor in determining the propriety of gifts and is found in the expression “legislative or administrative interest” which is defined in ORS 244.020(10) and is used in ORS Chapter 244, primarily, when applying the provisions regarding gifts accepted by public officials.

While a “gift” is defined in ORS 244.020(7)(a), ORS 244.020(7)(b), identifies specific gifts that are exempt from gift restrictions if the offers are made or accepted in the specific circumstances and conditions described.

## What does a public official need to know about a “Legislative or Administrative Interest” [ORS 244.020(10)]?

Beginning in 2010, the change to the definition of what is a legislative or administrative interest represents one of the most significant changes made in Oregon Government Ethics law during the last session of the Oregon Legislative Assembly.

The change is significant because knowing if the source of a gift offered to a public official has a legislative or administrative interest determines whether or not the gift offered is allowed or restricted. Before this change, a public official only had to know if a gift was offered from a source with a legislative or administrative interest in the public official’s governmental agency, but now the focus is on the vote or decision of each individual public official. The change places greater responsibility on the individual public official to decide if a gift offered is restricted by ORS Chapter 244. The definition of a legislative or administrative interest is provided in ORS 244.020(10) as follows:

“‘Legislative or administrative interest’ means an economic interest, distinct from that of the general public, in:

- (a) Any matter subject to the decision or vote of the public official acting in the public official’s capacity as a public official; or
- (b) Any matter that would be subject to the decision or vote of the candidate who, if elected, would be acting in the capacity of a public official.”

In the context of gifts offered to or accepted by a public official or candidate, the public official or candidate must determine if the source of the offered gift has a legislative or administrative interest in the decision or vote of the public official or candidate, if elected. In applying the phrase “legislative or administrative interest,” there are several factors to consider:

**Source:** The Commission adopted a rule [OAR 199-005-0030(2)] that identifies the source of a gift is the person or entity that makes the ultimate and final payment of the gift’s expense. OAR 199-005-0030 also places on the public official the burden of knowing the identity of the source and insuring that the aggregate value in ORS 244.025 is not exceeded.

**Distinct from that of the general public:** This phrase refers to an economic interest and in the context of gifts the economic interest of the source of a gift. The economic interest is whether a vote or decision by a public official would result in a financial gain or a financial detriment to the party who holds the interest. There are many votes or decisions made by public officials that have the same general economic impact on all members of the general public. Income or property tax rates would be examples.

There are other decisions or votes that have an economic impact on specific persons, businesses or groups that are not experienced by members of the general public alike. To illustrate, private contractors have an economic interest in a public body’s authority to award contracts and that economic interest is distinct from the economic interest held

by members of the general public in the contracting authority of a public body. Also, real estate developers would have an economic interest in a public body's authority to approve subdivision applications and that economic interest is distinct from the economic interest held by members of the general public in the approval authority of a public body.

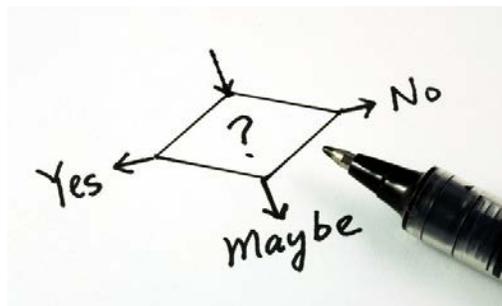
**Vote:** This has the common meaning of to vote as an elected member of a governing body of a public body or as a member of a committee, commission or board appointed by a governing body, Oregon Legislative Assembly or the Office of the Governor.

**Decision:** The Commission defines the term "decision" in OAR 199-005-0003(2). A public official makes a decision when the public official exercises the authority given to the public official to commit the public body to a particular course of action. Making a recommendation or giving advice in an advisory capacity does not constitute a decision.

The change to the definition of a legislative or administrative interest places the focus on the decision or vote of each individual public official. That means that any decision to accept or reject the offer of a gift must be made individually by each public official. It also means that there will be some public officials who may accept unlimited gifts from a source and other public officials within the same public body that would have restrictions on gifts from that same source because not all public officials in the same public body have similar responsibilities that would require any or similar decisions or votes.

If the source of the offer of a gift to a public official does not have a legislative or administrative interest in the decisions or votes of the public official, the public official can accept unlimited gifts from that source. [ORS 244.040(2)(f)] However, if the source of the offer of a gift to a public official has a legislative or administrative interest in the decisions or votes of the public official, the public official can only accept gifts from that source when the aggregate value of gifts from that source does not exceed \$50 in a calendar year [ORS 244.025].

While gifts from a source with a legislative or administrative interest in the decisions or votes of a public official are limited, there are some gifts that are exempt from the definition of what is a "gift." If the offer of a gift is exempt from the definition of a "gift," the offer may be accepted by a public official. The value of gifts that are allowed as exemptions does not have to be included when calculating the aggregate value of gifts received from that source in one calendar year.



There are gifts that are allowed because when offered under specific conditions and within certain circumstances the gifts are exempt from the definition of a “gift.” ORS 244.020(7)(b) provides a description of gifts that are allowed. If you are a public official accepting gifts or a source offering gifts it is important you become familiar with the requirements that may apply to you.

The following **GIFTS ARE ALLOWED** as exemptions to the definition of what is a “gift”:

- Campaign contributions as defined in ORS 260.005 [ORS 244.020(7)(b)(A)].
- Contributions to a legal expense trust fund established under ORS 244.209 [ORS 244.020(7)(b)(G)].
- Gifts from relatives or members of the household of public officials or candidates [ORS 244.020(7)(b)(B)].
- Anything of economic value received by a public official or candidate, their relatives or members of their household when:
  - The receiving is part of the usual and customary practice of the person’s business, employment, or volunteer position with any legal non-profit or for-profit entity [ORS 244.020(7)(b)(O)(i)].
  - The receiving bears no relationship to the person’s holding the official position or public office [ORS 244.020(7)(b)(O)(ii)].
- Unsolicited gifts with a resale value of less than \$25 and in the form of items similar to a token, plaque, trophy and desk or wall mementos [ORS 244.020(7)(b)(C) *and see resale value discussed in OAR199-005-0010*].
- Publications, subscriptions or other informational material related to the public official’s duties [ORS 244.020(7)(b)(D)].
- Waivers or discounts for registration fees or materials related to continuing education or to satisfy a professional licensing requirement for a public official or candidate [ORS 244.020(7)(b)(J)].
- Entertainment for a public official or candidate and their relatives or members of their households when the entertainment is incidental to the main purpose of the event [ORS 244.020(7)(b)(M) *and see “incidental” defined in OAR199-005-0025(1)*].
- Entertainment for a public official, a relative of the public official or a member of the public official’s household when the public official is acting in an official capacity and representing a governing agency for a ceremonial purpose [ORS 244.020(7)(b)(N) *and see “ceremonial” defined in OAR199-005-0025(2)*].

- Cost of admission or food and beverage consumed by the public official, a relative, household member, or staff member when accompanying the public official, who is representing government (state, local or special district), at a reception, meal or meeting held by an organization [ORS 244.020(7)(b)(E) *and the accompanying discussion in OAR199-005-0015*].
- Food or beverage consumed by a public official or candidate at a reception where the food and beverage is an incidental part of the reception and there was no admission charged [ORS 244.020(7)(b)(L) *and the accompanying discussion in OAR199-005-0025(1)*].
- When public officials travel together inside the state to an event bearing a relationship to the office held and the public official appears in an official capacity, a public official may accept the travel related expenses paid by the accompanying public official [ORS 244.020(7)(b)(K)].
- Payment of reasonable expenses if a public official is scheduled to speak, make a presentation, participate on a panel or represent a government agency at a convention, conference, fact-finding trip or other meeting. The paid expenses for this exception can only be accepted from another government agency, Native American Tribe, an organization to which a public body pays membership dues or not-for-profit organizations that are tax exempt under 501(c)(3) [ORS 244.020(7)(b)(F) *and see definition of terms for this exception in OAR 199-005-0020*].
- Payment of reasonable food, lodging or travel expenses for a public official, a relative of the public official or a member of the public official's household or staff may be accepted when the public official is representing the government agency or special district at one of the following:
  - Officially sanctioned trade promotion or fact-finding mission; [ORS 244.020(7)(b)(H)(i)]
  - Officially designated negotiation or economic development activity when receipt has been approved in advance [ORS 244.020(7)(b)(H)(ii). *Defined terms and an explanation of how and who may officially sanction or designate these events are addressed in OAR 199-005-0020(1)(b)(B).*]
- Payment of reasonable expenses paid to a public school employee for accompanying students on an educational trip [ORS 244.020(7)(b)(P)].
- Food and beverage when acting in an official capacity in the following circumstances:
  - In association with a financial transaction or business agreement between a government agency and another public body or a private entity, including such actions as a review, approval or execution of documents or closing a borrowing or investment transaction [ORS 244.020(7)(b)(I)(i)];

- While engaged in due diligence research or presentations by the office of the State Treasurer related to an existing or proposed investment or borrowing [ORS 244.020(7)(b)(I)(ii)]; or
- While engaged in a meeting of an advisory, governance or policy-making body of a corporation, partnership or other entity in which the office of the State Treasurer has invested moneys [ORS 244.020(7)(b)(I)(iii)].

The last gift I received was from \_\_\_\_\_. The source of this offer is / is not economically affected by my decisions or votes as a public official.

### **Gifts vs. Prohibited Use of Position**

In understanding issues related to gifts, the operative definition of a “gift” is used in deciding how Oregon Government Ethics law would apply to a gift offered to or accepted by a public official or candidate. The application of the gift provisions regarding candidates is not included in this discussion. The following is a paraphrase of the definition taken from ORS 244.020(7)(a):

**Gift: “Something of economic value” given** to a public official, a relative of the public official or a member of the public official’s household and the recipient either makes no payment or makes payment at a discounted price. The opportunity for the gift is one that is **not available to members of the general public**, who are not public officials, **under the same terms and conditions as** those that apply to the gift offered to **the public official**, the relative or a member of the household.

The definition of a “gift” has remained much the same since Oregon Government Ethics law was enacted. Originally, the law prohibited the offer or acceptance of any gifts; it allowed some gifts and for others it imposed limits on the aggregate value on gifts that could be accepted. With the recent revisions, Oregon Government Ethics law does not prohibit gifts but does place conditions on when some gifts may be accepted and for other gifts there is a limit on the aggregate value that can be accepted.

The primary focus of ORS 244.040(1) is on the use or attempted use of the position held by the public official and not on whether a gift is accepted by a public official. However, accepting gifts that would not be available “but for” holding a position as a public official could represent a prohibited financial benefit.

The financial benefit prohibited by ORS 244.040(1) is one obtained by a public official through the use or attempted use of a position or office held. The prohibited benefit may be gained through the public official’s access to and use of the public body’s resources.

The financial benefit may take several forms. It may be the avoidance of a personal expense, money, extra income from private employment, creation of a new employment opportunity or the use of confidential information for financial gain.

Gifts, on the other hand, are not received by a public official, primarily, because of the public official's use of a public body's resources, but because gifts are offered by sources other than the public official's government employer or the public body represented by the public official. Sources of gifts are private individuals, businesses or organizations; they are public bodies that are not the employer of or represented by the public official. Sources of gifts may also be employees of the same public body of the public official and they offer gifts acquired with their personal resources, not the public body's resources. If something of economic value is received from the employer of or the public body represented by a public official, that "something" is not a gift, it is a financial benefit either allowed or prohibited by ORS 244.040.

## **Conflict of Interest**

Oregon Government Ethics law defines **actual conflict of interest** [ORS 244.020(1)] and **potential conflict of interest** [ORS 244.020(13)]. In brief, a public official is met with a conflict of interest when participating in official action which could result in a financial benefit or detriment to the public official, a relative of the public official or a business with which either are associated.

**The difference between an actual conflict of interest and a potential conflict of interest is determined by the words "would" and "could."** A public official is met with an **actual** conflict of interest when the public official participates in action that **would** affect the financial interest of the official, the official's relative or a business with which the official or a relative of the official is associated. A public official is met with a **potential** conflict of interest when the public official participates in action that **could** affect the financial interest of the official, a relative of that official or a business with which the official or the relative of that official is associated.

### **Questions to ask yourself:**

**I own a business that my public body does business with. Yes / No**

**I have a relative that owns a business that my public body does business with. Yes / No**

**A member of my household owns a business that my public body does business with. Yes / No**

**I have identified \_\_\_\_\_ a business or businesses with which I, my relatives and members of my household are associated.**



## What if I am met with a conflict of interest?

A public official must announce or disclose the nature of a conflict of interest. The way the disclosure is made depends on the position held. The following public officials must use the methods described below:

### **An elected public official, other than a member of the Legislative Assembly, or an appointed public official serving on a board or commission:**

- (a) When met with a *potential* conflict of interest, announce publicly the nature of the potential conflict prior to taking any action thereon in the capacity of a public official; or
- (b) When met with an *actual* conflict of interest, announce publicly the nature of the actual conflict and refrain from participating\* as a public official in any discussion or debate on the issue out of which the actual conflict arises or from voting on the issue.

### **Any other appointed official, including public officials in public bodies who are appointed, employed or volunteer:**

Must provide a written notice to the person who appointed or employed them. The notice must describe the nature of the conflict of interest with which they are met [ORS 244,120(1)(c)].

**My appointing authority is \_\_\_\_\_.**

**\*NOTE:** If a public official is met with an actual conflict of interest and the public official's vote is necessary to meet the minimum number of votes required for official action, the public official may vote.

The public official must make the required announcement and refrain from any discussion, but may participate in the vote required for official action by the governing body. [ORS 244.120(2)(b)(B)]

These circumstances do not often occur. This provision does not apply in situations where there are insufficient votes because of a member's absence when the governing body is convened. Rather, it applies in circumstances when all members of the governing body are present and the numbers of members who must refrain due to actual conflicts of interest make it impossible for the governing body to take official action.

**If in doubt, contact the Oregon Government Ethics Commission to seek guidance prior to engaging in any action, decision or recommendation in your official capacity.**

**The following circumstances may exempt a public official from the requirement to make a public announcement or give a written notice describing the nature of a conflict of interest:**

- If the conflict of interest arises from a membership or interest held in a particular business, industry, occupation or other class and that membership is a prerequisite for holding the public official position [ORS 244.020(13)(a)].
- If the financial impact of the official action would impact the public official, relative or business of the public official *to the same degree* (meaning equally or proportionately) as other members of an identifiable group or "class." The Commission has the authority to determine the minimum size of a "class" [ORS 244.020(13)(b) and ORS 244.290(3)(a)].
- If the conflict of interest arises from an unpaid position as officer or membership in a nonprofit corporation that is tax-exempt under 501(c)(3) of the Internal Revenue Code [ORS 244.020(13)(c)].

**How is the announcement of the nature of a conflict of interest recorded?**

The public body that is served by the public official will record the disclosure of the nature of the conflict of interest in the official records of the public body [ORS 244.130(1)].

**Is a public official required to make an announcement of the nature of a conflict of interest each time the issue giving rise to the conflict of interest is discussed or acted upon?**

The announcement needs to be made on each occasion the conflict of interest is met. For example, an elected member of the city council would have to make the public announcement one time during a meeting of the city council. If the matter giving rise to the conflict of interest is raised at another meeting, the disclosure must be made again at that meeting. An employee in a city planning department would have to give a separate written notice on each occasion they participate in official action on a matter that gives rise to a conflict of interest [ORS 244.120(3)].

**If a public official failed to announce the nature of a conflict of interest and participated in official action, is the official action voided?**

No. Any official action that is taken may not be voided by any court solely by reason of the failure of the public official to disclose an actual or potential conflict of interest [ORS 244.130(2)].

**My positions as a \_\_\_\_\_ requires me to \_\_\_\_\_  
announce the nature of conflicts of interest on \_\_\_\_\_ occasion.**

**NOTES:**

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**Employment**

**Does Oregon Government Ethics law prohibit a public official from owning a private business or working for a private employer while continuing employment with or holding a position with a public body?**

No. Many public officials hold or perform services as volunteers, meaning there is little or no compensation and they have a private source of income to maintain a household. There are also public officials who do receive compensation, but for personal reasons find it necessary to seek additional sources of income. Some obtain employment with a private business and others establish a private business of their own.

ORS 244.040(3) prohibits a public official from, directly or indirectly, soliciting or accepting the promise of future employment based on the understanding that the offer is influenced by the public official's vote, official action or judgment. Any employer who may directly or indirectly offer employment under these conditions may also violate this provision.

In general, public officials may obtain employment with a private employer or engage in private income producing activity of their own. They must not use the position held as a public official to create the opportunity for additional personal income. The public official must also insure that there is a clear distinction between the use of personal resources and time for personal income producing activity and the use of the public body's time and resources. The Commission has created guidelines for public officials to follow in order to avoid violating Oregon Government Ethics law when engaged in private employment or a personally owned business.

**GUIDELINES FOR OUTSIDE EMPLOYMENT OF PUBLIC OFFICIALS**

1. Public officials are not to engage in private business interests or other employment activities on their governmental agency's time.
2. A governmental agency's supplies, facilities, equipment, employees, records or any other public resources are not to be used to engage in private business interests.
3. The position as a public official is not to be used to take official action that could have a financial impact on a private business with which you, a relative or member of your household are associated.

4. Confidential information gained as a public official is not to be used to obtain a financial benefit for the public official, a relative or member of the public official's household or a business with which any are associated.
5. When participating in an official capacity and met with a potential or actual conflict of interest related to a business, associated with the public official, relative or household member, the public official must disclose the nature of the conflict of interest using one of the following methods:
  - o Employees of governmental agencies must give written notice to their appointing authority.
  - o Elected or appointed public officials must publicly disclose once during each meeting convened by the governing body they serve.

**What are the restrictions on employment after I resign, retire or leave my public official position?**

- ORS 244.040(1) prohibits public officials from using their official positions or offices to create a new employment opportunity; however, most former public officials may enter the private work force with few restrictions.

**Resources**

All members of the Commission staff are cross-trained in the laws and regulations under the Commission's jurisdictions. Questions regarding the Commission's laws, regulations and procedures are a welcome daily occurrence. Timely and accurate answers are a primary objective of the staff. Guidance and information is provided either informally or in written formal opinions. The following are available:

- Telephone inquiries are answered during the call or as soon as possible.
- E-mail inquiries are answered with return e-mail or telephone call as soon as possible.
- Letter inquiries are answered by letter as soon as possible.
- Written opinions on specific circumstances can also be requested.

**If a person requests, receives or relies on any of the advice or opinions authorized by ORS 244.280 through ORS 244.284, does that person have what is referred to as "safe harbor" protection from becoming a respondent to a complaint filed with or initiated by the Commission?**

There is no "safe harbor," if the term is understood to mean that any person who relies on any advice or opinions offered by the Commission or the staff is protected from being a respondent to a complaint, found violating laws within the jurisdiction of the Commission or receiving a penalty for a violation.

There is, however, specific and conditional protection for any person who has requested and relied upon advice or an opinion from the Commission or its staff.

It is important to remember that the provisions of law apply to the individual actions of the person or public official. There are events or occasions when more than one public official may be present and participating in their official capacities. Depending on the circumstances and conditions for an event or transaction the law may have a different application for one public official than for other public officials.

## Sanctions for Violations

- Civil Penalty [ORS 244.350]
- Forfeiture [ORS 244.306]
- Letters of Reprimand, Correction or Education [ORS 244.350(5)]

## Resources and Information

- Telephone 503-378-5105
- Fax 503-373-1456
- e-mail: [OGEC.mail@state.or.us](mailto:OGEC.mail@state.or.us)
- Website: <http://www.oregon.gov/OGEC>
- Training
  - In person
  - iLinc Webinars – Presented live using the internet
  - iLearn – Self-paced online eLearning



**OREGON  
GOVERNMENT ETHICS  
COMMISSION**



3218 Pringle Rd. SE Suite 220  
Salem, OR 97302-1544  
Email: [ogec.mail@Oregon.gov](mailto:ogec.mail@Oregon.gov)  
Phone: (503) 378 – 5105  
Fax: (503) 373 – 1456  
Web: <http://www.oregon.gov/OGEC/>

**GOVERNMENT ETHICS LAWS OVERVIEW**

<p><b>Prohibited Use of Position or Office</b> (ORS 244.040)</p>	<p>Public officials are prohibited from using or attempting to use their public positions to obtain financial benefits for themselves, relatives, household members, or businesses with which any is associated, if the benefit would not be available but for the public official holding the position.</p>
<p><b>Financial Interest in Public Contract</b> (ORS 244.047)</p>	<p>A person who ceases to be a public official may not have a direct beneficial financial interest in a public contract (defined at ORS 279A.010) for two years after the date of its authorization, if the person played a significant role in authorizing (<i>i.e.</i>, selecting, executing, recommending, or approving) that public contract as a public official.</p>
<p><b>Limits to Accepting Gifts</b> (ORS 244.025; see ORS 244.020(10))</p>	<p>Public officials and their relatives are limited to accepting gifts (defined at ORS 244.020(7)) worth no more than an aggregate of \$50 in a given calendar year from any individual source reasonably known to have an economic interest in the public official’s decision-making.</p>
<p><b>Conflicts of Interest</b> (ORS 244.020(1); ORS 244.020(13); ORS 244.120)</p>	<p>When a public official, in an official capacity, is faced with making a decision, recommendation, or other action that “<i>would</i>” or “<i>could</i>” financially affect the official, a relative, or business with which either is associated, the public official is faced with an “<i>actual</i>” or “<i>potential</i>” conflict. A conflicted <i>member of a governing body</i> must provide notice of the conflict by making a public announcement, and if the conflict is “<i>actual</i>” (<i>i.e.</i>, “<i>would</i>” financially affect...) must refrain from participation in the matter. <i>Most other public officials</i> must provide written notice to a supervisor/employer. Either type of notice must state the nature of the conflict. A written notice must additionally request that the supervisor/employer dispose of the matter.</p>
<p><b>Nepotism Prohibitions</b> (ORS 244.177 – 179)</p>	<p>Public officials may not directly – or participate in any interview, discussion, or debate to – appoint, employ, promote, discharge, fire, or demote a relative or household member of the public official. Public officials are also prohibited from supervising relatives and household members.</p>

\* *NOTE: The terms “business”, “business with which the person is associated”, “member of the household”, “public official”, and “relative” are defined at ORS 244.020(2), (3), (11), (15), and (16), respectively.*

**DISCLAIMER:** This document presents a brief overview of the most generally applicable Oregon Government Ethics duties and may not account for all relevant laws, exceptions or circumstances. It is ***intended for use as a training tool only and should not substitute for review of ORS Chapter 244 or consultation with an attorney or the Oregon Government Ethics Commission regarding application of the law in a specific situation.***

## Oregon Government Ethics Commission (OGEC) Resource Chart

<b>TRAINING</b>	In-Person & On-Site	Trainers are available to present training sessions or workshops on government ethics law, lobbying regulations and executive session provisions. You can request this training by calling our office at: 503-378-5105 or by completing a ‘request for training’ on-line at: <a href="https://www.oregon.gov/OGEC/Pages/training_request.aspx">https://www.oregon.gov/OGEC/Pages/training_request.aspx</a>
	Webinars	OGEC offers Adobe Connect Webinars. These 30 to 60 minute trainings are presented live by an OGEC trainer using the internet. We offer several different classes each month or we can also provide customized webinar trainings: <ul style="list-style-type: none"> <li>• Monthly Webinar Calendar (bottom of page): <a href="https://www.oregon.gov/OGEC/Pages/training.aspx">https://www.oregon.gov/OGEC/Pages/training.aspx</a></li> <li>• To register or arrange for customized webinar training please e-mail us at: <a href="mailto:ogec.training@oregon.gov">ogec.training@oregon.gov</a></li> </ul>
	iLearnOregon	These training modules are short, focused and convenient. This training focuses on government ethics law, lobbying regulations and executive session provisions. Anyone with an e-mail address can register to take classes through iLearnOregon, whether you are a public official or a private citizen. iLearnOregon can be accessed via the following links: <ul style="list-style-type: none"> <li>• State employee – <a href="https://www.oregon.gov/OGEC/docs/training/ilearn_new_acct_state_employee_20101130.pdf">https://www.oregon.gov/OGEC/docs/training/ilearn_new_acct_state_employee_20101130.pdf</a></li> <li>• Non-State employee – <a href="https://www.oregon.gov/OGEC/docs/training/ilearn_new_acct_non_state_employee_20101129.pdf">https://www.oregon.gov/OGEC/docs/training/ilearn_new_acct_non_state_employee_20101129.pdf</a></li> </ul>
<b>GUIDANCE</b>	Request Guidance on Ethics Related Issues/Situations	<ul style="list-style-type: none"> <li>• <b>Written</b> – Send requests via e-mail to: <a href="mailto:ogec.mail@oregon.gov">ogec.mail@oregon.gov</a> ; by fax to: 503-373-1456 or by U.S. mail to: 3218 Pringle Road SE, Suite 220, Salem, Oregon 97302-1544</li> <li>• <b>Telephone</b> – 503-378-5105</li> <li>• <b>In-person</b> – By visiting our office at the mailing address listed under “Written” above.</li> </ul>
	Review Previously Issued Guidance	<ul style="list-style-type: none"> <li>• <b>Advice</b> – <a href="https://apps.oregon.gov/OGEC/CMS/Advice">https://apps.oregon.gov/OGEC/CMS/Advice</a></li> <li>• <b>Opinions</b> – <a href="https://www.oregon.gov/OGEC/pages/opinion_category.aspx">https://www.oregon.gov/OGEC/pages/opinion_category.aspx</a></li> </ul>
<b>FORMS &amp; PUBLICATIONS</b>	Guide for Public Officials	Link to Guide and 2015 Supplement: <a href="https://www.oregon.gov/OGEC/Pages/forms_publications.aspx">https://www.oregon.gov/OGEC/Pages/forms_publications.aspx</a>
	Public Records	Public Records Look-up: <a href="https://apps.oregon.gov/OGEC/EFS/Records">https://apps.oregon.gov/OGEC/EFS/Records</a> To request copies of public records in the custody of the OGEC: <a href="https://www.oregon.gov/OGEC/Pages/public_records.aspx">https://www.oregon.gov/OGEC/Pages/public_records.aspx</a>
	File a Complaint	Complaint form can be accessed via: <a href="https://apps.oregon.gov/OGEC/CMS/complaint">https://apps.oregon.gov/OGEC/CMS/complaint</a>