



OSPI Randy I. Dorn, State Superintendent

*Every student ready for
career, college, and life*

REPORT TO THE LEGISLATURE

Open Educational Resources (OER) Project

December 2015

Authorizing legislation: RCW 28A.300.803

<http://app.leg.wa.gov/rcw/default.aspx?cite=28A.300.803>

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Executive Summary

Open Educational Resources (OER) are teaching and learning materials that reside in the public domain or that have been released under an open license. These resources are available digitally at no cost to the district, distributed without restriction, and modified without permission.

As directed by the Washington State Legislature, the OER Project is creating a collection of openly licensed courseware that align with the Common Core State Standards. In addition, the OER Project is raising awareness and informing school districts about these resources. The goal is to provide districts with options for up-to-date and aligned resources that save money over the purchase of instructional materials.

During the 2013–15 biennium, our accomplishments included the following:

- Hosted OER summits in eastern and western Washington for 22 school districts
- Provided grants to five school districts and one Educational Service District
- Created a model instructional materials adoption policy that recognizes OER as a core instructional materials consideration (in collaboration with the Washington State Directors' Association)
- Acted as a lead steering committee state for the K–12 OER Collaborative
- Delivered OER awareness presentations at professional conferences, meetings and webinars across the state and nationwide
- Provided input on policy documents, case studies and articles
- Conducted two comprehensive instructional materials reviews of 17 full-course mathematics curricula and 40 English language arts units
- Created a model review process and identified review instruments for districts considering the adoption OER
- Expanded the online Reviewed OER Library to 24 full-course mathematics curricula and 60 English language arts units for grades 6–12
- Spoke at the Open Education Symposium, sponsored by the White House and U.S. Department of Education

In addition, Superintendent Dorn added his name to a call made by more than 100 organizations for a government-wide policy to openly license federally funded educational materials. The U.S. Department of Education is now proposing a new regulation that would require all copyrightable intellectual property created with Department grant funds to have an open license.

Background

Open Educational Resources provide an extraordinary opportunity for people to share knowledge on a wide scale:

- OER are available digitally at no cost to the district. Instead of purchasing or leasing instructional materials, use of OER creates the potential to shift those funds into other areas of critical need like professional development or technology capacity.
- OER materials are often more up-to-date than textbooks purchased on a multi-year replacement cycle.
- Most OER can be updated and modified without asking the content creator for permission. This allows resources to be adapted to meet instructional goals.
- With the adoption of the Common Core State Standards (CCSS), conditions are ripe to explore the use of OER. Districts need resources that align with the new standards, and content creators are able to create materials for use on a wide scale.

OSPI created an internal workgroup consisting of members of the agency's Digital Learning, Teaching and Learning, and Educational Technology departments. We surveyed stakeholders throughout the state to get a snapshot of current awareness and concerns regarding OER. The majority of educator questions involved:

- Locating the appropriate resources
- Evaluating quality and standards alignment
- Ensuring equity of access for all students
- Recognizing OER as a district option for adoption in school board policy

To address these concerns, the workgroup planned a three-pronged strategy:

1. **OER Awareness and Capacity Building:** Increase district awareness of openly licensed resources and provide districts with the resources to locate, evaluate, and implement OER.
2. **OER Review:** Develop a review process to evaluate alignments to the CCSS and act as a model for districts considering OER.
3. **OER Library Creation:** Develop a catalog of openly licensed material reviewed for alignment with the CCSS. Include links to other open courseware available to school districts free of charge.

In addition to making districts and educators aware of the benefits and the availability of high-quality instructional materials for consideration, we are also addressing the

challenges of implementation and facilitating collaborations between districts and other states to leverage the usefulness of open resources.

OER Awareness and Capacity Building

OER Summits

Following large OER introductory awareness events in 2012–13, the OER Project decided to provide additional outreach to a more targeted audience of districts who were interested in wide-scale OER implementation. These OER Summits explored the benefits and challenges of implementing OER. District teams of 3–5 people represented curriculum, administration, and technology. The Summit covered the following areas:

- Identification of OER value proposition
- Exploration of common OER delivery formats and discussion of their implications for classroom use, distribution, and professional development
- Understanding of review instruments as well as open license types and details
- Consideration of district policies and OER and how to address the adoption of rapidly changing content while ensuring fidelity of implementation
- Examination of Washington districts on the front lines of OER implementation

After attending the OER summit, 76% of participants said they will recommend OER to their district (based on 37 responses).

OER Presentations/Webinars

OSPI presented information about Washington OER Project efforts at 57 professional conferences, meetings, and webinars. The events reached 2,385 district administrators, curriculum and technology directors, school board members, teachers, and teacher librarians. They ranged in size from small face-to-face meetings with district administration and school boards to large conferences reaching an international audience. A small selection of the events and links to archived video or audio is provided below:

- Evaluating OER Quality, International Open Education Conference (<https://www.youtube.com/watch?v=sHjktFD02kM>)
- EdWeb.net: Evaluating OER Quality and Standards Alignment (<http://home.edweb.net/evaluating-oer-quality-and-standards-alignment-it-may-be-free-but-is-it-any-good>)
- SETDA: Ensuring the Quality of Digital Content for Learning (<https://vimeo.com/121845451> - WA info from 8:24–18:10)

Additionally, the OER Project hosted a webinar series with nationally recognized OER experts on topics such as “Importance of OER in the Changing Educational Landscape,” “Adapting, Implementing, and Developing OER,” and “Effectively Locating OER with OER Commons.”

WA OER Project Articles/Blog Posts

The OER Project was called upon frequently to provide input to national OER policy documents, case studies, and informational articles. Below are a few examples.

- Student Achievement Partners’ *Achieve the Core Aligned* publication, dedicated to the conversation about Common Core-aligned instructional materials.
Part 1: [Introduction to Open Educational Resources](#)
Part 2: [Open Educational Resources in Action](#)
- SETDA Open Educational Resources in Action: Implementation Case Studies
[Washington profile](#)
- Education Week: [Washington Districts Put Open Educational Resources to Work](#)

Grants for OER Implementation/Development

As a follow-up to the 2013 OER review, OSPI developed a competitive grant program for districts interested in adapting materials based on reviewer feedback and/or implementing open resources in the classroom. All content created or modified with Washington OER grant funds is openly licensed under the [Creative Commons Attribution](#) license.

Five school districts and one Educational Service District in Washington state received a total of \$167,803 in OER grants in fiscal years 2014 and 2015:

- **Selkirk School District** - As a small school district, often old or outdated curriculum materials are used as funds are scarce with regard to new curriculum purchases. Three secondary classes piloted and implemented OER resources in Algebra I, 11th and 12th grade English, and Biology.
- **Southwest Washington Math Consortium** - With grant funds, a consortium of four school districts completed their district-developed Algebra 1 curriculum, and designed accompanying professional development resources. As an open licensing requirement was placed on all materials created with grant funds, this work is now available online: <http://www.mathematics.pbworks.com>.
- **Spokane Public Schools** - Spokane Public Schools is the largest school district in eastern Washington and the second largest in the state. OER grant funds helped launch the district’s K–8 implementation of an OER mathematics curriculum in the 2014–2015 school year, including professional development for instructional leaders and math support resources for students and parents. [News: Spokesman Review, 12/4/13](#); [Spokane Public Schools, 12/5/13 \(YouTube\)](#)

- **Educational Service District 113** - Funds provided to ESD 113 were used to assemble a statewide task force to define the needs and initiate the development of an Open Educational Resources (OER) Users' Group to share ideas, best practices and implementation resources for the EngageNY Mathematics curriculum.

Two additional districts received funding—Sunnyside and Lake Washington—however, both had issues that prevented the completion of grant deliverables.

- Sunnyside's grant revolved around the creation of implementation resources for all EngageNY secondary mathematics courses. At grant award time, EngageNY had an anticipated release time for these materials that fit into the Sunnyside timeline; however, delays in the release of EngageNY secondary math courses made their work impossible.
- Lake Washington's grant outlined a plan to review and adapt OER high school science textbooks aligned to the Next Generation Science Standards (NGSS) to bring to the school board as an option for district adoption. Review of existing OER science textbooks did not meet their needs with respect to alignment to the NGSS. Although the team originally felt they could develop their own materials, the educators tasked with the initial review work were unable to add development time to their schedules. Funds for these projects were redistributed to other OER Project efforts.

Robust and ongoing professional development is critical to ensure effective implementation, as evidenced by Spokane Public Schools' implementation. Also, though costs may be saved over the purchase of traditional instructional materials, print costs need to be factored in if that is a district requirement, a lesson certainly learned during Spokane's interim adoption of EngageNY.

For additional news articles and video regarding the OER Project's efforts, see [Appendix B](#).

National Collaborations

Achieve OER Institute

Washington continues to be an important contributor to the [Achieve OER Institute](#), a group of seven states: California, Illinois, Louisiana, Minnesota, North Carolina, Washington, and Wisconsin. The goal of OER Institute is to bring these states together to discuss issues and policy barriers surrounding the use of OER in college- and career-ready standards implementation. (Achieve, Inc., is a bi-partisan, non-profit organization that collaborated with the National Governors Association and the Council of Chief State School Officers on the CCSS Initiative.)

Washington's experiences and expertise in K-12 OER play a key role in informing Achieve's policy recommendation work. Our progress in advancing the use of OER in classrooms is

showcased in both the original policy brief and the updated profiles released in early 2015. Both documents are included in [Appendix C](#).

K–12 OER Collaborative

As we talk with colleagues in other states, there is a need and an opportunity to work together. Common Core helps facilitate this type of collaboration, and the [K–12 OER Collaborative](#) arose out of this dialog. The initiative is led by a group of 12 states with the goal of creating comprehensive, high-quality, OER supporting K–12 mathematics and English language arts that are aligned with state learning standards.

Washington is one of the three original steering committee states and dedicates staff time to the project. The initiative is supported with expertise from state content specialists, the [Council of Chief State School Officers \(CCSSO\)](#), [Creative Commons](#), [Lumen Learning](#), [The Learning Accelerator \(TLA\)](#), [Achieve](#), the [State Educational Technology Directors Association \(SETDA\)](#), the [State Instructional Materials Review Association \(SIMRA\)](#), and the [Association of State Supervisors of Mathematics \(ASSM\)](#). These resources would offer additional choice to local education agencies, significantly reduce expenditures for instructional materials, and provide much greater flexibility with quality digital educational content. States can adapt these materials to meet their particular needs using their own channels of review and development.

In 2015, after an RFP review by the Collaborative, 10 developers were selected to create sample units. The prototype units were reviewed by a cross section of teachers from all the collaborating states to determine which developers should be considered for full-development contracts. Given its experience conducting quality and alignment reviews of OER, Washington was actively involved in planning this review process.

As the K–12 OER Collaborative shifts to a non-profit organization, Washington will continue to play an important role on the Strategy Committee, the main body providing advice and feedback to the management team on various strategic challenges and opportunities.

OER Review

As a part of the legislative mandate to identify and develop a library of openly licensed courseware aligned with the Common Core State Standards, OSPI conducted reviews of OER in high school and middle school English language arts (ELA) and mathematics. This report covers two review cycles, one in February 2014 and one in February 2015. The review process made use of existing review instruments designed to gauge alignment with the CCSS.

The results from this review enable educators and content developers to tap into the most powerful feature of OER: the ability to freely adapt and redistribute materials.

Review Background, Goals, and Process

OSPI has over a decade of experience with reviewing instructional materials for their alignment with state learning standards in both reading and mathematics. Today, the instructional materials umbrella covers far more than just textbooks; it includes not only core curricula, but also supplemental resources from a number of sources, in both print and digital formats. OER are an important part of this new instructional material ecosystem. OSPI provides supports that help educators become critical consumers of any type of instructional material. As district interest in OER increases, so too does the need to provide an unbiased evaluation of their quality and alignment to Washington state learning standards.

For all the OSPI OER Project's reviews, the team examined available OER in full-course mathematics and individual units in English language arts. This is reflective of the more modular nature of ELA in grades 6–12. In 2013, the inaugural OER review examined available open resources in Algebra 1, Integrated Math 1, and 11th and 12th grade ELA. The 2014 review cycle focused on Geometry, Integrated Math 2, and 9th and 10th grade ELA. The 2015 review targeted middle school level instructional materials in mathematics and ELA.

Quality assurance and standards alignment are priorities when districts assess any new instructional materials. The goals of the review were:

1. Help educators select high-quality materials for their classrooms
2. Provide districts with information to help with materials adoptions and a replicable process and instruments to evaluate CCSS alignment of instructional material
3. Identify gaps in CCSS alignment that can be addressed by content creators or district users

For each review cycle, OSPI announced the OER review and sought materials to include in the process. While some OER developers requested to have their materials reviewed, the OSPI OER team also identified OER that met the scope of the review.

To conduct the OER review, OSPI recruited and selected ELA and mathematics educators. Reviewers were chosen from across the state, representing a variety of teaching environments, from large districts to small schools in both rural and urban areas. All reviewers demonstrated deep expertise in the content area they reviewed as well as experience with CCSS implementation and instructional materials development. The committee reviewed the materials with the specific goal of analyzing how well they address the CCSS, using several nationally recognized review instruments from Student Achievement Partners and Achieve, all based on the Publisher’s Criteria for the Common Core State Standards. Each resource was reviewed by four different reviewers.

It is important to note:

- Though this particular review is focused on OER, the actual review process and tools are not specific to OER. They can and should be used with any instructional material under consideration by school districts.
- This review process was not intended to rank the materials; rather, the results provide rich evaluator feedback on changes necessary to bring the OER resource into closer CCSS alignment.
- The results of this review do not represent an endorsement from OSPI as to the recommended use nor adoption of the OER materials that were reviewed.
- OSPI does not require the use of any particular instructional materials, including OER, by districts or schools.
- Washington school districts have specific local policies and procedures that may govern the use and adoption of core and/or supplemental instructional materials. These should be reviewed as districts and buildings consider OER within their suite of instructional materials and resources.
- The results of this review represent one point in time in a continually evolving process of OER materials. The results are intended as a resource for schools and educators, as well as content developers creating materials for those audiences.
- The instruments used in this review process were intentionally selected and are intended to be used in concert to consider the full breadth of the CCSS and the unique nature of OER materials. The suite of instruments and process may be used with any instructional material, OER or published, to gauge CCSS alignment.

Copies of all the rubrics distributed to reviewers are located in the [Rubrics section](#) on the OSPI OER Project website.

2014 and 2015 OER Review Findings

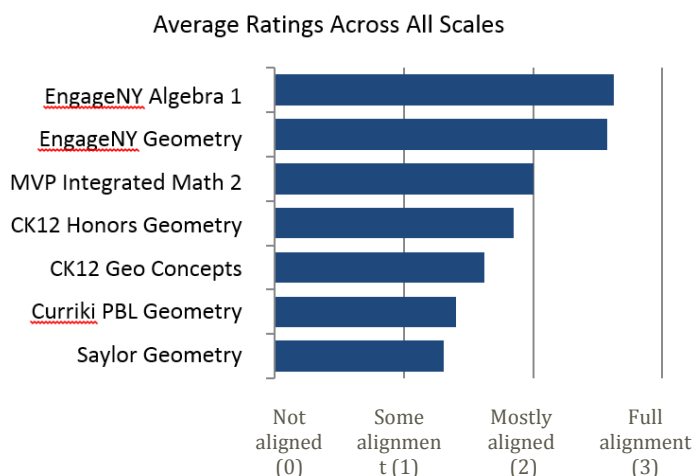
Overall, the reviewers found a number of resources in both mathematics and ELA that were well-aligned to the CCSS, and worthy of consideration by districts choosing instructional materials. OER have the capacity to provide opportunities to access strong materials for all students regardless of the fiscal situation in their schools.

Mathematics

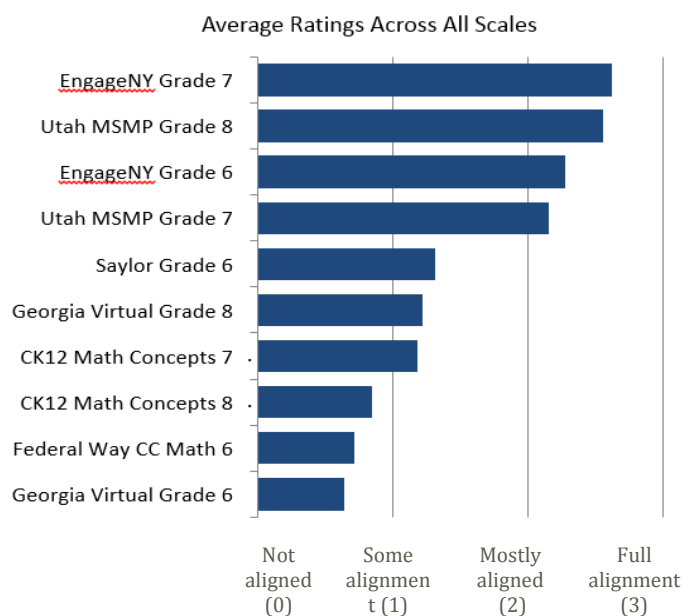
Mathematics reviewers found that seven of the 17 reviewed full-course curriculum show significant promise as a viable selection now and several more could be considered with adaptation. These seven mathematics resources consistently received an overall average score of 2 or higher (on a 0–3 point scale) across most criteria. For the most part, the other products showed potential in some areas, but their comprehensive scores were lower and a majority of the reviewers did not recommend the full course for use, although their use as supplemental material or a portion of a unit was well documented.

Average ratings across all rubrics (IMET, EQuIP, and Achieve OER)
for all mathematics resources in 2014 and 2015 reviews

2014 High School Mathematics Review



2015 Middle School Mathematics Review



English Language Arts

In ELA, reviewers found many choices for educators seeking ELA units with some alignment to the CCSS. Seventeen out of 40 units received an overall average score of 2 or higher on a 0–3 point scale, with an additional 12 units at or above the midpoint of the scale.

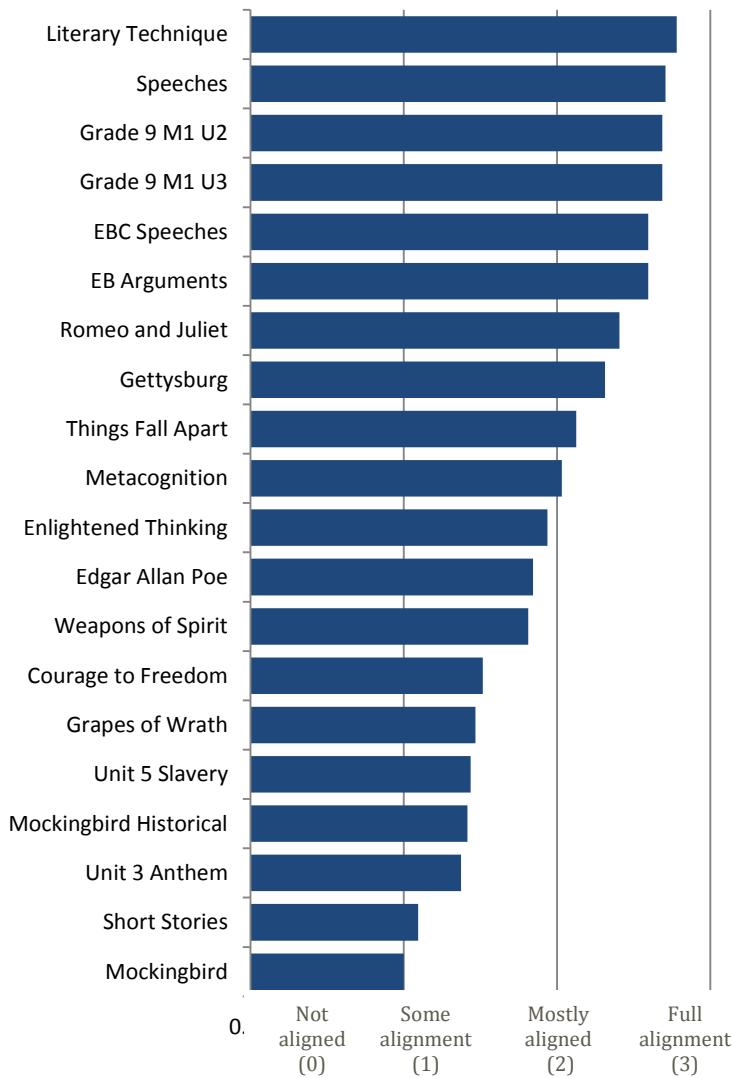
Most ELA middle school classes use a flexible set of units through the course of a quarter or semester, rather than textbooks with a fixed sequence of units and materials. Educators can reliably consider many of the OER ELA units that were reviewed for use in their classroom and be confident that the units can be reasonably adapted to meet the CCSS by a teacher well versed in the standards.

Average ratings across all rubrics (EQulP, Achieve OER) for all ELA resources in 2014 and 2015 reviews

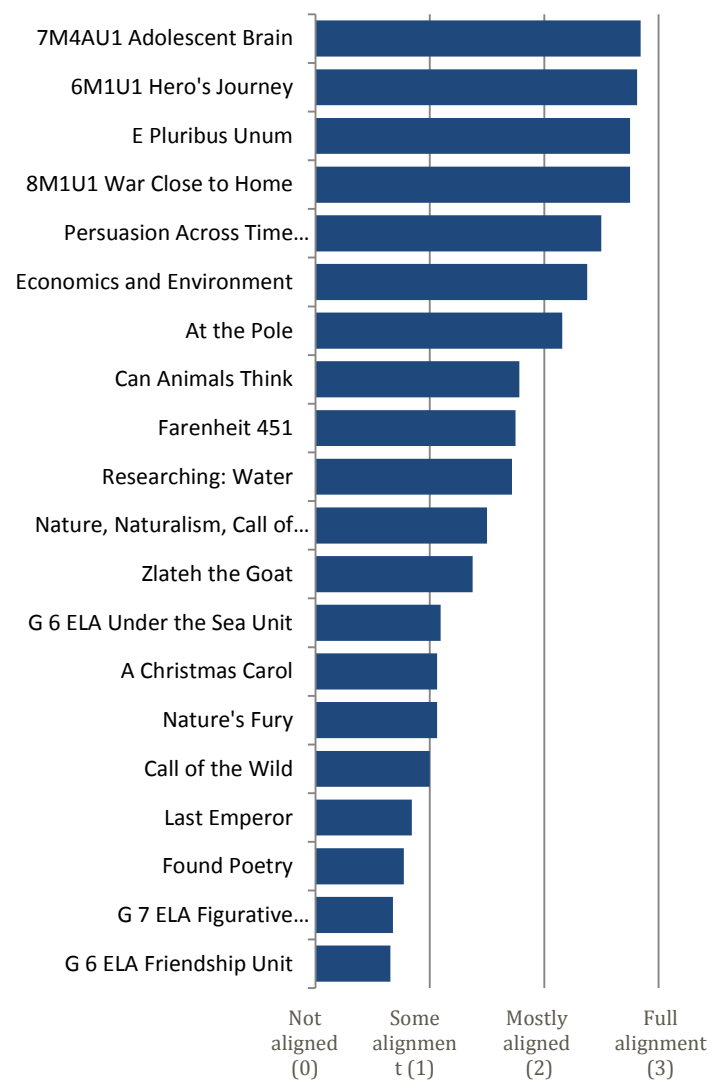
2014 High School ELA Review

2015 Middle School ELA Review

Average Ratings Across All Scales



Average Ratings Across All Scales



OER Library

The Reviewed OER Library on the OER Project website provides an in-depth analysis of the results of the OER reviews as well as the process and instruments used.

The image below is an example of the resources listed on the OER Library (<https://digitalllearning.k12.wa.us/oer/library/>). A link to the complete OER review documents are included in [Appendix D](#).

MATHEMATICS (6TH-8TH) RESOURCES

Resource	PC/IM	EQ	AO
<u>Grade 6: EngageNY Grade 6 Mathematics</u> (Reviewed Spring 2015) EngageNY/Common Core			
<u>Grade 6: Federal Way Public Schools CK-12 6th Grade Common Core Math</u> (Reviewed Spring 2015) Federal Way Public Schools			
<u>Grade 6: Georgia Virtual Learning MS Math 6th Grade</u> (Reviewed Spring 2015) Georgia Virtual Learning			
<u>Grade 6: Saylor.org Academy Math Grade 6</u> (Reviewed Spring 2015) Saylor			
<u>Grade 7: CK-12 Middle School Math Concepts</u> (Reviewed Spring 2015) CK-12			
<u>Grade 7: EngageNY Grade 7 Mathematics</u> (Reviewed Spring 2015) EngageNY/Common Core			
<u>Grade 7: Utah Middle School Math Project - 7th Grade</u> (Reviewed Spring 2015) Utah Middle School			
<u>Grade 8: CK-12 Middle School Math Concepts Grade 8</u> (Reviewed Spring 2015) CK-12			
<u>Grade 8: Georgia Virtual Learning MS Math 8th Grade</u> (Reviewed Spring 2015) Georgia Virtual Learning			
<u>Grade 8: Utah Middle School Math Project - 8th Grade</u> (Reviewed Spring 2015) Utah Middle School			

Each resource entry includes important supplemental information that clarifies the type of open license, available delivery formats, professional development opportunities, and instructional supports.

The goal of the Reviewed OER Library is to provide districts with a Consumer Reports-style guide to OER so that they can make informed decisions about instructional materials. Reviewers called out resource strengths and their ideal use case scenarios, and also

identified any gaps in alignment, providing actionable feedback so that districts could adapt the material and fill the gaps in alignment. As a follow-up to this work, we developed the competitive grant program described earlier in this document for districts interested in adapting existing OER to better reflect Common Core alignment.

In addition to the vetted resource section, there is a listing of suggested resource sites and OER repositories.

To address district requests for an OER Toolkit, there is a section devoted to helpful resources for school districts and teachers interested in implementing OER and communicating with stakeholders in their educational communities. These communication documents are found in [Appendix E](#).

Conclusion and Next Steps

Over the past two years, the OER Project emerged as a recognized leader on K–12 open educational resources. As the OER Project evolves, we move from large outreach efforts focused on general OER awareness to more targeted interactions with districts starting to take a closer look at OER—moving it out of the realm of the theoretical and into practice. Specifically, we will work to address those barriers that arise when districts implement OER at scale as core instructional material.

During the 2015–17 Biennium, the OER project will continue to focus on OER awareness, review, and library creation.

OER Awareness and Capacity Building

- Continue the OER Grant program, focusing on the creation of OER Users' Groups to share ideas, define best practices, and champion effective distribution and implementation of resources. The initial group will focus on an online community of practice for EngageNY Mathematics.
- Promote the development of open policies within school districts and OSPI that allow for open licensing of materials created using public funds.
- Collaborate with OSPI Teaching and Learning content directors on targeted OER efforts to address district stakeholder barriers to OER adoption as core instructional material.
- Expand efforts to facilitate collaborative cross-district development of OER, targeting content areas where there is demonstrated wide scale need for content adaptation/development and connection to the Common Core State Standards.
- Continue work with the K–12 OER Collaborative and other states to provide expertise around the instructional materials quality review process and district OER adoption considerations.
- Provide the White House and U.S. Department of Education's #GoOpen effort with communication tools regarding district considerations for OER usage and suggestions for best practices regarding successful OER implementation. (#GoOpen is a campaign to encourage states, school districts and educators to use openly licensed educational materials. Bethel School District is one of six ambassador districts that currently use openly licensed educational materials and will help other districts understand how to effectively discover and curate these resources.)

OER Review

- Widely disseminate the model process and instruments used by the OER Project to review open resources for Common Core alignment, encouraging districts to access

the in depth reviewer assessments of existing open curriculum and consider them as options when making instructional material adoption considerations.

- Conduct a review of elementary level resources.
- Support the use of rubrics adapted by OER grantees in the service of other content area OER reviews.

OER Library Creation

- Work with recipients of the OER grant on implementation and dissemination of material to all educators via a Washington hub in OER Commons and inclusion in a section of our online OER Library.

Acknowledgments

OSPI OER Project Team

- Barbara Soots, OER Program Manager
- Anne Gallagher, Mathematics Director
- Katy Absten, Mathematics Specialist
- Liisa Moilanen Potts, English Language Arts Director (previous)
- Amy Ripley, ELA Specialist
- Dennis Small, Educational Technology Director
- Lillian Hunter, Digital Learning Department Director (current)
- Karl Nelson, Digital Learning Department Director (previous)
- Jessica Vavrus, Assistant Superintendent, Teaching and Learning
- Gil Mendosa, Deputy Superintendent

APPENDICES

Appendix A: Legislation

Legislation: Engrossed Second Substitute House Bill 2337
<http://apps.leg.wa.gov/billinfo/summary.aspx?bill=2337&year=2011>

Revised Code of Washington
RCW 28A.300.803 <http://apps.leg.wa.gov/RCW/default.aspx?cite=28A.300.803>

Appendix B: Washington OER Project Press and Video

Spokane Public Schools Adopts Math Curriculum to Align with New State Standards (YouTube, 2013)
<https://www.youtube.com/watch?v=wrBft9zwnsl>

Spokane Public Schools looks to adopt new math program (The Spokesman Review, December 2013)
<http://www.spokesman.com/stories/2013/dec/04/spokane-public-schools-looks-to-adopt-new-math/>

Districts Put Open Educational Resources to Work (Education Week, June 2015)
<http://www.edweek.org/ew/articles/2015/06/11/districts-put-open-educational-resources-to-work.html>

Open Educational Resources (Student Achievement Partners, 2015)
<http://achievethecore.org/aligned/introduction-to-open-educational-resources/>
<http://achievethecore.org/aligned/open-educational-resources-in-action/>

Appendix C: Washington OER Project as a Case Study for National Organizations

State Support for Open Educational Resources: Key Findings from Achieve's OER Institute
<http://www.achieve.org/files/OERInstitutePolicyBriefFINALc.pdf>

An Update to the OER Institute State
<http://www.achieve.org/files/StateProfilesUpdateFINAL.pdf>

SETDA Open Educational Resources in Action: Implementation Case Studies
Washington profile: <http://oerstudies.setda.org/case-studies/washington/#!/summary>

State of the States: Open Educational Resources in K-12 Education
<http://www.ccsso.org/Documents/2014/Open%20Educational%20Resources%20in%20K-12%20Education-ver1.1.pdf>

Appendix D: OSPI OER Reviews

Full Report (online):

2014: <https://digitalllearning.k12.wa.us/oer/review/2014/report/summary.php>

2015: <http://digitalllearning.k12.wa.us/oer/review/2015/report/summary.php>

Full report (PDF):

2014:

<https://digitalllearning.k12.wa.us/oer/review/2014/report/OSPI OER Report 2014.pdf>

2015:

<http://digitalllearning.k12.wa.us/oer/review/2015/report/OSPI OER Report 2015.pdf>

Appendix E: WA OER Project Toolkit

Open Educational Resources: Talking Points to Engage Stakeholders in Conversation

<http://digitalllearning.k12.wa.us/oer/OER TalkingPoints.pdf>

Open Educational Resources: Considerations for School Districts

<http://digitalllearning.k12.wa.us/oer/OER KeyConsiderationsForDistricts.pdf>

OER Presentation Template and Selected Readings

<http://digitalllearning.k12.wa.us/oer/resources.php>

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