

MINUTES

STATE BOARD OF EDUCATION

NOVEMBER 2022

Minutes

State Board of Education

November 18, 2022

**STATE BOARD OF EDUCATION**  
*(State Board for Career and Technology Education)*

**KEVEN ELLIS, Lufkin**  
**Chair of the State Board of Education**  
**District 9**

**PAM LITTLE, Fairview**  
**Vice Chair of the State Board of**  
**Education**  
**District 12**

**GEORGINA PÉREZ, El Paso**  
**Secretary of the State Board of**  
**Education**  
**District 1**

**Board Members**

**LAWRENCE ALLEN, JR., Houston**  
**District 4**

**WILL HICKMAN, Houston**  
**District 6**

**REBECCA BELL-METEREAU, San Marcos**  
**District 5**

**TOM MAYNARD, Florence**  
**District 10**

**RUBEN CORTEZ, JR., Brownsville**  
**District 2**

**SUE MELTON-MALONE, Robinson**  
**District 14**

**AICHA DAVIS, Dallas**  
**District 13**

**MARISA PEREZ-DIAZ, Converse**  
**District 3**

**JAY JOHNSON, Pampa**  
**District 15**

**MATT ROBINSON, Friendswood**  
**District 7**

**PATRICIA HARDY, Fort Worth**  
**District 11**

**AUDREY YOUNG, Apple Springs**  
**District 8**

## **Committees of the State Board of Education**

### **INSTRUCTION**

Sue Melton-Malone  
Rebecca Bell-Metereau  
Pam Little  
Georgina Pérez  
Audrey Young

### **SCHOOL FINANCE/PERMANENT SCHOOL FUND**

Tom Maynard  
Lawrence Allen, Jr.  
Keven Ellis  
Pat Hardy  
Marisa Perez-Diaz

### **SCHOOL INITIATIVES**

Matt Robinson  
Ruben Cortez, Jr.  
Aicha Davis  
Will Hickman  
Jay Johnson

Minutes  
State Board of Education  
Friday, November 18, 2022

The State Board of Education met at 9:03 a.m. on Friday, November 18, 2022, in the State Board of Education Room, #1-104, of the William B. Travis Building, 1701 N. Congress Avenue, Austin, Texas. Attendance was noted as follows:

**Present:** Keven Ellis, chair; Lawrence A. Allen, Jr.; Rebecca Bell-Metereau; Ruben Cortez, Jr.; Aicha Davis; Pat Hardy; Will Hickman (virtual); Jay Johnson; Pam Little vice-chair; Tom Maynard; Sue Melton-Malone; Georgina C. Pérez, secretary; Marisa B. Perez-Diaz; Matt Robinson; Audrey Young

### **Student Performance**

A student performance was provided by Lovejoy A Cappella from Lovejoy High School in the Lovejoy Independent School District.

### **Invocation**

### **Pledge of Allegiance**

### **Roll Call**

### **Approval of Minutes**

State Board of Education, September 2, 2022

State Board of Education September 26, 2022

**MOTION AND VOTE:** *The State Board of Education unanimously approved the minutes of the September 2 and September 26, 2022, meetings of the State Board of Education, as printed.*

## **1. Resolutions and Presentation**

### **Resolution Honoring the 2020 Presidential Awards for Excellence in Mathematics and Science Teaching (PAEMST) National Awardees**

*The State Board of Education, by unanimous consent, adopted a resolution honoring national awardees for the 2020 Presidential Awards for Excellence in Mathematics and Science Teaching (PAEMST) program.*

(ATTACHMENT 1, page 11)

### **Resolution Honoring the 2022 Presidential Awards for Excellence in Mathematics and Science Teaching (PAEMST) State Finalists**

*The State Board of Education, by unanimous consent, adopted a resolution honoring state finalists for the 2022 Presidential Awards for Excellence in Mathematics and Science Teaching (PAEMST) program.*

(ATTACHMENT 2, page 13)

**Resolution Honoring Departing State Board of Education Member Jay Johnson**

*The State Board of Education, by unanimous consent, adopted a resolution honoring departing State Board of Education member Jay Johnson.*

(ATTACHMENT 3, page 15)

**Resolution Honoring Departing State Board of Education Member Matt Robinson**

*The State Board of Education, by unanimous consent, adopted a resolution honoring departing State Board of Education member Matt Robinson.*

(ATTACHMENT 4, page 17)

**Resolution Honoring Departing State Board of Education Member Georgina Cecilia Pérez**

*The State Board of Education, by unanimous consent, adopted a resolution honoring departing State Board of Education member Georgina Cecilia Pérez.*

(ATTACHMENT 5, page 19)

**Resolution Honoring Departing State Board of Education Member Ruben Cortez, Jr.**

*The State Board of Education, by unanimous consent, adopted a resolution honoring departing State Board of Education member Ruben Cortez, Jr.*

(ATTACHMENT 6, page 21)

**Resolution Honoring Departing State Board of Education Member Sue Melton-Malone**

*The State Board of Education, by unanimous consent, adopted a resolution honoring departing State Board of Education member Sue Melton-Malone.*

(ATTACHMENT 7, page 23)

**Resolution Honoring Departing State Board of Education Member Lawrence Allen, Jr.**

*The State Board of Education, by unanimous consent, adopted a resolution honoring departing State Board of Education member Lawrence Allen, Jr.*

(ATTACHMENT 8, page 25)

**Commissioner's Comments and Presentation**

Mike Morath, commissioner of education, provided updates on the redesign of the STAAR test. He also provided an overview of proposed new administrative rules for school safety requirements and school safety grant opportunities.

**Public Testimony**

Public testimony was provided by the following individual:

NAME: Augustin Villarreal  
AFFILIATION: Self

## 2. Approval of Consent Agenda

Any agenda item may be placed on the consent agenda by any State Board of Education committee. The State Board of Education may elect to take separate action on any item on the consent agenda.

*By unanimous consent, the State Board of Education approved the following items on the consent agenda.*

**(1) Decision on the Percentage Distribution of the Permanent School Fund for Fiscal Years 2024 and 2025**

(Board agenda page I-1)

The State Board of Education removed this item from the consent agenda.

**(2) Proposed Amendment to 19 TAC Chapter 112, Texas Essential Knowledge and Skills for Science, Subchapter C, High School, §112.41, Implementation of Texas Essential Knowledge and Skills for Science, High School, Adopted 2020**

**(Second Reading and Final Adoption)**

(Board agenda page I-4)

The State Board of Education approved for second reading and final adoption the proposed amendment to 19 TAC Chapter 112, Texas Essential Knowledge and Skills for Science, Subchapter C, High School, §112.41, Implementation of Texas Essential Knowledge and Skills for Science, High School, Adopted 2020; and

Made an affirmative finding that immediate adoption of the proposed amendment to 19 TAC Chapter 112, Texas Essential Knowledge and Skills for Science, Subchapter C, High School, §112.41, Implementation of Texas Essential Knowledge and Skills for Science, High School, Adopted 2020, is necessary and shall have an effective date of 20 days after filing as adopted with the Texas Register, as recommended by the Committee of the Full Board (ATTACHMENT 9).

**(3) Approval of Updates and Substitutions to Adopted Instructional Materials**

(Board agenda page II-18)

The State Board of Education approved the request from Learning A-Z to update content in its product *RAZ Plus ELL Texas Edition*, grades K-5, adopted under *Proclamation 2019*, as recommended by the Committee on Instruction.

**(4) Approval of Costs to Administer the 2022–2023 State-Developed Assessments to Private School Students**

(Board agenda page III-1)

The State Board of Education approved the recommended per-student costs for administering the state assessments to private school students in the 2022–2023 school year as listed in ATTACHMENT 10, as recommended by the Committee on School Finance/Permanent School Fund.

- (5) **Proposed Repeal of 19 TAC Chapter 129, Student Attendance, Subchapter A, Student Attendance Allowed, and Subchapter B, Student Attendance Accounting (First Reading and Filing Authorization)**  
(Board agenda page III-5)

The State Board of Education approved for first reading and filing authorization the proposed repeal of 19 TAC Chapter 129, Student Attendance, Subchapter A, Student Attendance Allowed, and Subchapter B, Student Attendance Accounting, as recommended by the Committee on School Initiatives.

- (6) **Report on Permanent School Fund Securities Transactions and the Investment Portfolio and Ratification of Purchases and Sales for the Months of July and August 2022**  
(Board agenda page III-10)

Based on the information provided by staff and the recommendation of the executive administrator and chief investment officer and the commissioner of education, the State Board of Education ratified the purchases and sales for the months of July 2022 and August 2022, in the amount of \$1,631,746,929 and \$1,896,145,452, respectively (ATTACHMENT 11), as recommended by the Committee on School Finance/Permanent School Fund.

- (7) **Report on Permanent School Fund Liquid Account and Ratification of Purchases and Sales for the Months of July and August 2022**  
(Board agenda page III-11)

Based on the information provided by staff and the recommendation of the executive administrator and chief investment officer and the commissioner of education, the State Board of Education ratified the purchases and sales of the Permanent School Fund Liquid Account for the period July 1, 2022, through August 31, 2022, in the amounts of \$1,166,571,366 and \$316,668,187, respectively (ATTACHMENT 12), as recommended by the Committee on School Finance/Permanent School Fund.

- (8) **Proposed Revisions to 19 TAC Chapter 33, Statement of Investment Objectives, Policies, and Guidelines of the Texas Permanent School Fund (First Reading and Filing Authorization)**  
(Board agenda page III-12)

The State Board of Education approved for first reading and filing authorization proposed revisions to 19 TAC Chapter 33, Statement of Investment Objectives, Policies, and Guidelines of the Texas Permanent School Fund, as presented in ATTACHMENT 13), as recommended by the Committee on School Finance/Permanent School Fund.

- (9) **Approval of the Date to Transfer Management of the Permanent School Fund to the Texas Permanent School Fund Corporation as Contemplated in Senate Bill 1232**  
(Board agenda page III-16)

The State Board of Education removed this item from the consent agenda.



## COMMITTEE OF THE FULL BOARD

### **3. Decision on the Percentage Distribution of the Permanent School Fund for Fiscal Years 2024 and 2025**

(Board agenda page I-1)

**MOTION AND VOTE:** *It was moved by Dr. Ellis and carried that the State Board of Education approve a percentage distribution of 3.32% from the Permanent School Fund to the Available School Fund for the 2024-2025 state fiscal biennium which would produce an estimated annual distribution of \$1.551 billion, as recommended by the Committee of the Full Board.*

*(Mr. Allen and Dr. Robinson were absent for the vote.)*

### **4. Approval of the Date to Transfer Management of the Permanent School Fund to the Texas Permanent School Fund Corporation as Contemplated in Senate Bill 1232**

(Board agenda page III-16)

**MOTION AND VOTE:** *It was moved by Mr. Maynard and carried without objection that the State Board of Education approve January 1, 2023, as the agreed-upon transfer date of the management and investment of the Permanent School Fund and transfer of related assets as contemplated and described in Article 2 of Senate Bill 1232 and further set forth in the Joint Resolution of the State Board of Education and the Texas Permanent School Fund Corporation, recommended by the Committee on School Finance/Permanent School Fund.*

### **5. Legislative Recommendations for the 88<sup>th</sup> Texas Legislature**

(Board agenda page I-3)

**MOTION AND VOTE:** *It was moved by Mrs. Little and carried unanimously that the State Board of Education make the following recommendation to the 88th Texas Legislature under the header “Charter Approval Process,” as recommended by the Committee of the Full Board.*

“Grant SBOE veto authority over charter expansions.”

**MOTION AND VOTE:** *It was moved by Mrs. Little and carried unanimously that the State Board of Education make the following recommendation under the header “Charter Regulation,” as recommended by the Committee of the Full Board.*

“Charter schools in the State of Texas would follow the same rules as ISDs.”

**MOTION AND VOTE:** *It was moved by Mrs. Little and carried that the State Board of Education make the following recommendations to the 88th Texas Legislature under the header “Instructional Materials,” as recommended by the Committee of the Full Board.*

“Textbooks – All LEAs would use SBOE textbooks approved by SBOE or seek a TEA waiver.”

“Combine SBOE approval process with Texas Resource Review with SBOE approval of rubric.”

“Align instructional materials to cover 100% of TEKS/standards.”

**MOTION AND VOTE:** *It was moved by Mrs. Little and carried unanimously that the State Board of Education add the following recommendation to the 88th Texas Legislature under the header “SBOE Member Benefits/Staff Support,” as recommended by the Committee of the Full Board.*

“Provide SBOE member benefits and staff support.”

**MOTION AND VOTE:** *It was moved by Mrs. Little that the State Board of Education make the following recommendation to the 88th Texas Legislature under the header “Funding & PSF Appropriations,” as recommended by the Committee of the Full Board.*

“That the Texas State Board of Education calls on the Texas Legislature to reject all attempts to divert public dollars away from public schools in the form of vouchers, an education savings account, taxpayer savings grants, tuition-tax credits, a business franchise tax credit or an insurance premium tax credit, or any other mechanisms that have the effect of reducing funding to public schools.”

*The motion carried with 11 members voting Aye, 2 members voting No, and 1 member abstaining as follows:*

<u>Aye:</u>	Mr. Allen	Mrs. Melton-Malone
	Mr. Cortez	Ms. Pérez
	Ms. Davis	Ms. Perez-Diaz
	Dr. Johnson	Dr. Robinson
	Mrs. Little	Dr. Young

<u>No:</u>	Mr. Hickman	Mr. Maynard
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<u>Abstain:</u>	Ms. Hardy
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**MOTION AND VOTE:** *It was moved by Mrs. Little and carried unanimously that the State Board of Education make the following recommendation to the 88th Texas Legislature under the header “Funding & PSF Appropriations,” as recommended by the Committee of the Full Board.*

“Raise the floor of the minimum salary schedule by a minimum of 50% and fully fund it.”

6. **Proposed Revisions to 19 TAC Chapter 113, Texas Essential Knowledge and Skills for Social Studies, Subchapter A, Elementary, Subchapter B, Middle School, and Subchapter C, High School**  
**(Second Reading and Final Adoption)**  
(Board agenda page I-9)

**MOTION:** *It was moved by Mrs. Little that the State Board of Education approve for second reading and final adoption proposed revisions to 19 TAC Chapter 113, Texas Essential Knowledge and Skills for Social Studies, Subchapter A, Elementary, Subchapter B, Middle School, and Subchapter C, High School, as recommended by the Committee of the Full Board.*

**MOTION AND VOTE:** *It was moved by Mrs. Little, seconded by Mr. Maynard, and carried that the State Board of Education amend Subsection (a) in Sections 113.11, 113.12, 113.13, 13.14, 113.15, 113.16, 113.18, 113.19, 113.20, 113.31, 113.41, 113.42, 113.43, and 113.44 to delete numbers (1), (2), and (3) to read as follows:*

“Implementation. The provisions of this section shall be implemented by school districts beginning with the 2024-2025 [~~2025-2026~~] school year.”

**VOTE:** *A vote was taken on the main motion that the State Board of Education approve for second reading and final adoption proposed revisions to 19 TAC Chapter 113, Texas Essential Knowledge and Skills for Social Studies, Subchapter A, Elementary, Subchapter B, Middle School, and Subchapter C, High School, as amended. The motion carried (ATTACHMENT 14).*

**7. Update on Texas Essential Knowledge and Skills (TEKS) Review**  
(Board agenda page I-98)

**MOTION:** *It was moved by Mrs. Little that the State Board of Education approve the TEKS review and revision process for career and technical education (ATTACHMENT 15), as recommended by the Committee of the Full Board.*

**MOTION AND VOTE:** *It was moved by Mr. Maynard, seconded by Ms. Hardy, and carried that the State Board of Education amend footnote 2 of the process to read as follows:*

2 TEA will identify an advisory board of CTE educators and administrators with demonstrated experience in the program(s) of study under review. The advisory board will provide feedback during the review and revision of the CTE TEKS. SBOE members may **identify individuals to serve on the advisory board and** will have an opportunity to review and approve or deny advisory board members. If a recommended advisory board member is not denied **by SBOE members** within the determined deadline, the advisory board member will be considered approved.

*(Mr. Allen and Ms. Hardy were absent for the vote.)*

**VOTE:** *A vote was taken on the main motion that the State Board of Education approve the TEKS review and revision process for career and technical education (ATTACHMENT 16), as amended. The motion carried unanimously.*

**MOTION AND VOTE:** *It was moved by Mrs. Little and carried unanimously that the State Board of Education request that TEA staff develop TEKS for an Occupational Safety and Health Administration (OSHA) course, as recommended by the Committee of the Full Board.*

**COMMITTEE ON INSTRUCTION**

**8. Proposed Amendment to 19 TAC Chapter 74, Curriculum Requirements, Subchapter C, Other Provisions, §74.27, Innovative Courses and Programs**  
**(Second Reading and Final Adoption)**  
(Board agenda page II-1)

**MOTION AND VOTE:** *It was moved by Mrs. Melton-Malone and carried unanimously that the State Board of Education approve for second reading and final adoption the proposed amendment to 19 TAC Chapter 74, Curriculum Requirements, Subchapter C, Other Provisions, §74.27, Innovative Courses and Programs; and*

*Make an affirmative finding that immediate adoption of the proposed amendment to 19 TAC Chapter 74, Curriculum Requirements, Subchapter C, Other Provisions, §74.27, Innovative Courses and Programs, is necessary and shall have an effective date of 20 days after filing with the Texas Register, as recommended by the Committee on Instruction.*

9. **Proposed New 19 TAC Chapter 111, Texas Essential Knowledge and Skills for Mathematics, Subchapter D, Other High School Mathematics Courses, §111.56, Advanced Placement (AP) Precalculus (One Credit)**  
**(First Reading and Filing Authorization)**  
(Board agenda page II-5)

**MOTION AND VOTE:** *It was moved by Mrs. Melton-Malone and carried that the State Board of Education approve for first reading and filing authorization proposed new 19 TAC Chapter 111, Texas Essential Knowledge and Skills for Mathematics, Subchapter D, Other High School Mathematics Courses, §111.56, Advanced Placement (AP) Precalculus (One Credit), as recommended by the Committee on Instruction.*

10. **Proposed Revisions to 19 TAC Chapter 127, Texas Essential Knowledge and Skills for Career Development and Career and Technical Education, Subchapter A, Middle School**  
**(First Reading and Filing Authorization)**  
(Board agenda page II-9)

**MOTION AND VOTE:** *It was moved by Mrs. Melton-Malone and carried that the State Board of Education approve for first reading and filing authorization the proposed revisions to 19 TAC Chapter 127, Texas Essential Knowledge and Skills for Career Development and Career and Technical Education, Subchapter A, Middle School, as recommended by the Committee on Instruction.*

11. **Approval of Agricultural Education Programs List**  
(Board agenda page II-20)

**MOTION AND VOTE:** *It was moved by Mrs. Melton-Malone and carried that the State Board of Education approve the list of elementary agriculture education programs available for use by school districts and charter schools, as recommended by the Committee on Instruction.*

12. **Consideration of Petition for Amendment of Rule Concerning 19 TAC Chapter 74, Curriculum Requirements, Subchapter B, Graduation Requirements, §74.12, Foundation High School Program**  
(Board agenda page II-21)

**MOTION AND VOTE:** *It was moved by Mrs. Melton-Malone and carried unanimously that the State Board of Education deny the petition to amend the rule concerning fine arts courses eligible for graduation requirements, as recommended by the Committee on Instruction because Oral Interpretation I, II, and III are not aligned with fine arts courses.*

**COMMITTEE ON SCHOOL INITIATIVES**

- 13. Review of Proposed Amendments to 19 TAC Chapter 229, Accountability System for Educator Preparation Programs**  
(Board agenda page IV-2)

**MOTION AND VOTE:** *It was moved by Dr. Robinson and carried unanimously that the State Board of Education take no action on the proposed amendments to 19 TAC Chapter 229, Accountability System for Educator Preparation Programs, as recommended by the Committee on School Initiatives.*

- 14. Review of Proposed Revisions to 19 TAC Chapter 241, Certification as Principal**  
(Board agenda page IV-67)

**MOTION AND VOTE:** *It was moved by Dr. Robinson and carried unanimously that the State Board of Education take no action on proposed revisions to 19 TAC Chapter 241, Certification as Principal, as recommended by the Committee on School Initiatives.*

**REGARDING AGENDA ITEMS POSTED FOR DISCUSSION ON COMMITTEE AGENDAS**

Committee on Instruction

Mrs. Melton-Malone did not report on the Committee on Instruction.

Committee on School Finance/Permanent School Fund

Mr. Maynard provided an update on the bond guarantee program.

Committee on School Initiatives

Dr. Robinson did not report on the Committee on School Initiatives.

**REPORTS OF OTHER STATE BOARD OF EDUCATION MEMBERS REGARDING AGENDA ITEMS AND EDUCATIONAL ACTIVITIES AND CONCERNS IN INDIVIDUAL DISTRICTS**

Dr. Ellis gave board members an opportunity to provide information regarding agenda items or other relevant information about public education.

The meeting adjourned at 1:22 p.m.



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Pat Hardy, Secretary  
Signed Feb. 3, 2023

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## ***R E S O L U T I O N***

**WHEREAS** the *Presidential Awards for Excellence in Mathematics and Science Teaching* program identifies outstanding mathematics and science teachers in each state and the four U.S. jurisdictions; and

**WHEREAS** through national selection committees, one mathematics finalist and one science finalist were selected to represent Texas; and

**WHEREAS** these teachers have become Texas national awardees for the *Presidential Awards for Excellence in Mathematics and Science Teaching*; now, therefore, be it

**RESOLVED**, That the State Board of Education does hereby extend its congratulations to Kristen Butler, Medlin Middle School, Northwest Independent School District, Trophy Club, TX for being named Texas National Awardee in the primary mathematics category for the 2020 Presidential Award; and be it further

**RESOLVED**, That the State Board of Education does hereby extend its congratulations to Lori Garrett, Cactus Elementary School, Dumas Independent School District, Amarillo, Texas for being named Texas National Awardee in the primary science category for the 2020 Presidential Award; and be it further

**RESOLVED**, That this resolution be presented to the aforementioned teachers for being identified as state and national awardees for the 2020 *Presidential Awards for Excellence in Mathematics and Science Teaching* program, and that a copy be included in the permanent records of the State Board of Education.

**WITNESS** our signatures this eighteenth day of November, two thousand and twenty-two, in Austin, Texas.

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Dr. Keven Ellis, Chair

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Georgina C. Pérez, Secretary

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## ***RESOLUTION***

**WHEREAS** the *Presidential Awards for Excellence in Mathematics and Science Teaching* program identifies outstanding mathematics and science teachers in each state and the four U.S. jurisdictions; and

**WHEREAS** through state selection committees, three mathematics finalists and three science finalists were selected as Texas finalists; and

**WHEREAS** these teachers have become candidates for the *Presidential Awards for Excellence in Mathematics and Science Teaching*; now, therefore, be it

**RESOLVED**, That the State Board of Education does hereby extend its congratulations to Jessica Garza, Williams Elementary School, Pasadena Independent School District, Pasadena, Texas; Kate Duncan, Robert L. Puster Elementary School, Lovejoy Independent School District, Lovejoy, Texas; Nicole Davis, Pioneer Crossing Elementary School, Manor Independent School District, Manor, Texas; for being named State Finalists in the elementary mathematics category for the 2022 Presidential Award; and be it further

**RESOLVED**, That the State Board of Education does hereby extend its congratulations to Denise Carvin, Radiant STEM Academy, Lewisville, Texas; Cheri Palmer, iUniversity Preparatory School, Grapevine-Colleyville Independent School District, Grapevine, Texas; Shatara White, Tomball Intermediate School, Tomball Independent School District, Tomball, Texas; for being named State Finalists in the elementary science category for the 2022 Presidential Award; and be it further

**RESOLVED**, That this resolution be presented to the aforementioned teachers for being identified as state finalists for the 2022 *Presidential Awards for Excellence in Mathematics and Science Teaching* program, and that a copy be included in the permanent records of the State Board of Education.

**WITNESS** our signatures this eighteenth day of November, two thousand and twenty-two, in Austin, Texas.

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Dr. Keven Ellis, Chair

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Georgina C. Pérez, Secretary

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## ***RESOLUTION***

**WHEREAS** John “Jay” Johnson has the eagerness and passion to improve public education in Texas; and

**WHEREAS** he is a dedicated public servant for education who was elected to serve District 15 of the State Board of Education in November 2020, where he served as a key member of the Committee on School Initiatives; and

**WHEREAS** he served for over 16 years on the Pampa Independent School District’s board of trustees including as president of the board for two years; and

**WHEREAS** he is a founding member of the Pampa Education Foundation, and he has served as president of the Pampa Youth and Community Center Board of Directors; and

**WHEREAS** he is also famous in Pampa for being inducted into the Pampa High School Hall of Fame; and

**WHEREAS** along with his dedication to education, he was responsible for many healthy and bright smiles in his profession as a dentist where he practiced in Pampa, Gray County for 43 years; now, therefore be it

**RESOLVED**, that with bright and happy smiles, members of the State Board of Education wish John “Jay” Johnson the very best in his next endeavors; and be it further

**RESOLVED**, that this resolution be presented to John “Jay” Johnson and that a copy be included in the permanent records of the State Board of Education.

**WITNESS** our signatures this eighteenth day of November, two thousand and twenty-two, in Austin, Texas.

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Keven Ellis, Chair

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Georgina C. Pérez, Secretary

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## ***RESOLUTION***

**WHEREAS** Matt Robinson has been a passionate advocate for traditional public schools; and

**WHEREAS** he showed that commitment by serving on the Friendswood ISD Board of Trustees for a decade before serving four years on the State Board of Education; and

**WHEREAS** he leaves the board as chair of the Committee on School Initiatives which he diligently led the past two years; and

**WHEREAS** he successfully juggled this public service with his work as a medical doctor; and

**WHEREAS** examples of his dedication could be seen as he often attended local school functions and zoom meetings of the State Board of Education while wearing his scrubs; and

**WHEREAS** he used his expertise as a medical doctor to inform the revisions to the health education Texas Essential Knowledge and Skills (TEKS); now, therefore be it

**RESOLVED**, that the State Board of Education wishes Matt Robinson a healthy prognosis of gratitude and appreciation for his service; and be it further

**RESOLVED**, that this resolution be presented to Matt Robinson and that a copy be included in the permanent records of the State Board of Education.

**WITNESS** our signatures this eighteenth day of November, two thousand and twenty-two, in Austin, Texas.

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Keven Ellis, Chair

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Georgina C. Pérez, Secretary

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## ***RESOLUTION***

**WHEREAS** Georgina Cecilia Pérez is a passionate former eighth-grade English Language Arts Reading teacher in the Ysleta School District; and

**WHEREAS** she often found solace and comfort in libraries then grew up to be a fierce advocate for literacy and has now helped provide more than 500,000 books to students who live in rural or impoverished areas; and

**WHEREAS** immediately upon joining the board, she channeled her passion language arts and reading to ensure the board adopted a strong set of English and Spanish language arts and reading Texas Essential Knowledge and Skills; and

**WHEREAS** her State Board of Education district encompassed 40 West Texas counties that included more than 900 miles along the Texas-Mexico border; and

**WHEREAS** she was often “on the road again” to meet with constituents so that she could hear their concerns in person; and

**WHEREAS** she served as a vital member of the board’s Committee on Instruction and as secretary of the board since 2019; and

**WHEREAS** she worked tirelessly to reach across party lines to bring about the best decisions on behalf of the children of Texas; and

**WHEREAS** this staunch Democrat quickly formed a close and strong alliance with Donna Bahorich, a Republican chair of the State Board of Education; and

**WHEREAS** this pairing known as “Thelma and Louise” crisscrossed the state gathering input from constituents and together they forged bipartisan solutions on many policy issues;

**WHEREAS** this proud El Paso native was instrumental in the development of the state’s first ethnic studies course and helped craft a fast-track approach to developing additional ethnic studies courses; now, therefore be it

**RESOLVED**, that the State Board of Education thanks Georgina Cecilia Pérez for her passion and dedication to Texas public education; and be it further

**RESOLVED**, that this resolution be presented to Georgina Cecilia Pérez and that a copy be included in the permanent records of the State Board of Education.

**WITNESS** our signatures this eighteenth day of November, two thousand and twenty-two, in Austin, Texas.

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Keven Ellis, Chair

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Pam Little, Vice Chair

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## ***R E S O L U T I O N***

**WHEREAS** Ruben Cortez Jr. has demonstrated a long-standing commitment to service, particularly in the area of public education; and

**WHEREAS** he served on the Brownsville ISD Board of Trustees, the Region One Education Service Center Board of Directors, and on various committees for the Texas and National Association of School Boards, addition to his decade of service on the State Board of Education; and

**WHEREAS** he served as Secretary of the State Board of Education for two terms from 2015 to 2019; and

**WHEREAS** he developed a reputation as someone who carefully scrutinizes applications that request approval for the creation of a new school district known as a charter school; and

**WHEREAS** he regularly reached out to administrators and other active educators to get their first-hand input before making policy decisions; and

**WHEREAS** he worked successfully with coalitions to help craft the state's first ethnic studies course, which has now become an example for other ethnic studies courses; now, therefore be it

**RESOLVED**, that the State Board of Education wishes Ruben Cortez Jr. all the very best on his next pursuit; and be it further

**RESOLVED**, that this resolution be presented to Ruben Cortez Jr. and that a copy be included in the permanent records of the State Board of Education.

**WITNESS** our signatures this eighteenth day of November, two thousand and twenty-two, in Austin, Texas.

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Keven Ellis, Chair

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Georgina C. Pérez, Secretary

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***RESOLUTION***

**WHEREAS** Sue Melton-Malone passionately served Texas public education for almost half a century as both an educator and as a member of the State Board of Education; and

**WHEREAS** she taught school in the Ross and West school districts for 36 years and is now completing a decade of service on this board; and

**WHEREAS** her election as state president of the Association of Texas Professional Educators for the 2007-2008 school year shows that Sue Melton-Malone was a recognized leader in her profession; and

**WHEREAS** she used her skills as a church choir director to lead the board and audience in many robust renditions of "Happy Birthday" to celebrate fellow board members and staff; and

**WHEREAS** as chair of the Committee on Instruction for the past eight years, she helped members of the committee sing from the same page as they crafted policies; and

**WHEREAS** she frequently used her teacher voice to present dozens of long and complex motions amending the Texas Essential Knowledge and Skills; now, therefore be it

**RESOLVED**, that the State Board of Education wishes Sue Melton-Malone many years of fun adventures; and be it further

**RESOLVED**, that this resolution be presented to Sue Melton-Malone and that a copy be included in the permanent records of the State Board of Education.

**WITNESS** our signatures this eighteenth day of November, two thousand and twenty-two, in Austin, Texas.

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Keven Ellis, Chair

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Georgina C. Pérez, Secretary

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## ***RESOLUTION***

**WHEREAS** Lawrence Allen Jr. is a third-generation educator who dedicated his life to improving education in the classroom, as an administrator, and at the state level as a member of the State Board of Education; and

**WHEREAS** he was elected to the State Board of Education in 2004 to serve in the same seat previously occupied by his mother, Dr. Alma Allen; and

**WHEREAS** during his 17 years on the board, he served on all three committees, was vice chair of the board for a two-year term, and served as vice chair of the Committee on School Finance /Permanent School Fund for eight years; and

**WHEREAS** he developed a reputation as the “EF Hutton” of the State Board of Education because he did not speak often but when he did everyone listened; now, therefore be it

**RESOLVED**, that the State Board of Education wishes Lawrence Allen Jr. all the best on his next venture; and be it further

**RESOLVED**, that this resolution be presented to Lawrence Allen Jr. and that a copy be included in the permanent records of the State Board of Education.

**WITNESS** our signatures this eighteenth day of November, two thousand and twenty-two, in Austin, Texas.

\_\_\_\_\_  
Keven Ellis, Chair

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Georgina C. Pérez, Secretary

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**ATTACHMENT**  
**Text of Proposed Amendment to 19 TAC**

**Chapter 112. Texas Essential Knowledge and Skills for Science**

**Subchapter C. High School**

**§112.41. Implementation of Texas Essential Knowledge and Skills for Science, High School, Adopted 2020.**

- (a) The provisions of §§112.42-112.45 of this subchapter shall be implemented by school districts beginning with the 2024-2025 school year .
- (b) No later than July 31, 2023 [~~2022~~] , the commissioner of education shall determine whether instructional materials funding has been made available to Texas public schools for materials that cover the essential knowledge and skills for science as adopted in §§112.42-112.45 of this subchapter.
- (c) If the commissioner makes the determination that instructional materials funding has been made available under subsection (b) of this section, §§112.42-112.45 of this subchapter shall be implemented beginning with the 2024-2025 [~~2023-2024~~] school year and apply to the 2024-2025 [~~2023-2024~~] and subsequent school years.
- (d) If the commissioner does not make the determination that instructional materials funding has been made available under subsection (b) of this section, the commissioner shall determine no later than July 31 of each subsequent school year whether instructional materials funding has been made available. If the commissioner determines that instructional materials funding has been made available, the commissioner shall notify the State Board of Education and school districts that §§112.42-112.45 of this subchapter shall be implemented for the following school year.
- (e) Sections 112.34, 112.35, 112.38, and 112.39 of this subchapter shall be superseded by the implementation of §§112.42-112.45 of this subchapter.

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## Recommended Private School Costs for the 2022–2023 School Year

### State of Texas Assessments of Academic Readiness (STAAR®) and Texas English Language Proficiency Assessment System (TELPAS)

<b>Program</b>	<b>Test</b>	<b>Number of Tests Based on Eligible Testers</b>	<b>Total Cost</b>	<b>Cost per Student per Test</b>	<b>Recommended Cost per Private School Student per Test</b>
STAAR	Grades RLA*	3,739,020	\$42,778,492.12	\$11.44	\$11.44
	Mathematics*	2,937,444	\$14,453,783.57	\$4.92	\$4.92
	Science*	1,377,284	\$9,335,406.27	\$6.78	\$6.78
	Social Studies	878,620	\$6,140,304.95	\$6.99	\$6.99
TELPAS	Kindergarten–Grade 12	1,063,533	\$14,759,557.65	\$13.88	\$13.88

\*Includes English and Spanish versions for grades 3–5.

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**TEXAS PERMANENT SCHOOL FUND  
SUMMARY OF TRANSACTIONS FOR APPROVAL  
(Including External Manager's Trades)  
For July 1, 2022 through August 31, 2022**

Purchases/Capital Calls:

Long Term Fixed Income	\$ 851,248,262
Public Market Equities	532,751,768
Alternative Investments	<u>247,746,899</u>
<b>TOTAL</b>	<b><u>\$ 1,631,746,929</u></b>

Sales/Distributions:

Long Term Fixed Income	\$ 1,497,180,234
Public Market Equities	115,709,503
Alternative Investments	<u>283,255,715</u>
<b>TOTAL</b>	<b><u>\$ 1,896,145,452</u></b>

General Land Office Contributions:

FY 2021 Cumulative August 2021	FY 2022 Cumulative August 2022
\$45,000,000	\$0

Based on the above information provided by staff including a report that deposits to the Permanent School Fund from the General Land Office were \$45,000,000 through August 2021 for fiscal year 2021 versus \$0 through August 2022 for fiscal year 2022, and the recommendation of the Executive Administrator and Chief Investment Officer and the Commissioner of Education; it is moved by unanimous consent that the Committee on School Finance/Permanent School Fund ratify for the months of July 2022 through August 2022 Permanent School Fund portfolio purchases of \$1,631,746,929 and sales of \$1,896,145,452.

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**TEXAS PERMANENT SCHOOL FUND  
SUMMARY OF TRANSACTIONS FOR APPROVAL  
FOR PSF LIQUID ACCOUNTS  
For July 1, 2022 through August 31, 2022**

<u>Purchases:</u>		
Fixed Income		\$ -
Public Market Equities		<u>1,166,571,366</u>
TOTAL		<u><u>\$ 1,166,571,366</u></u>
 <u>Sales:</u>		
Fixed Income		\$ 308,107,064
Public Market Equities		<u>8,561,123</u>
TOTAL		<u><u>\$ 316,668,187</u></u>

Based on the above information provided by staff and the recommendation of the Executive Administrator and Chief Investment officer and the Commissioner of Education: It is moved by unanimous consent that the Committee on School Finance/Permanent School Fund ratify for the period July 1, 2022 through August 31, 2022 Permanent School Fund Liquid Account purchases of \$1,166,571,366 and sales of \$316,668,187.

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ATTACHMENT  
Text of Proposed New 19 TAC

**Chapter 33. Statement of Investment Objectives, Policies, and Guidelines of the Texas Permanent School Fund**

**Subchapter A. State Board of Education Rules**

**§33.3. Duties and Responsibilities of the State Board of Education Related to the Texas Permanent School Fund Corporation.**

- (a) The Texas Constitution, Article VII, §§1-8, establish the Available School Fund, the Texas Permanent School Fund (PSF), and the State Board of Education (SBOE) and specify the standard of care SBOE members must exercise in managing PSF assets. In addition, the constitution directs the legislature to establish suitable provisions for supporting and maintaining an efficient public free school system, defines the composition of the PSF and the Available School Fund, and requires the SBOE to set aside sufficient funds to provide free instructional materials for the use of children attending the public free schools of this state. The members of the SBOE serve as fiduciaries of the PSF.
- (b) Pursuant to Texas Education Code, Chapter 43, Subchapter B, the SBOE delegated the authority to manage and invest the PSF to the Texas PSF Corporation, a special-purpose governmental corporation that is an instrumentality of the state of Texas with all necessary and implied powers to accomplish its purpose. The SBOE has the following duties and responsibilities with respect to the Texas PSF Corporation:
- (1) establish by rule the terms of the five members of the SBOE appointed to the Texas PSF Corporation Board of Directors;
  - (2) adopt the certificate of formation for the Texas PSF Corporation;
  - (3) approve the adoption and amendment of the Texas PSF Corporation bylaws; and
  - (4) act as the sole member of the Texas PSF Corporation.

**§33.4. Ethical Standards for Members of the State Board of Education.**

- (a) Definitions. For purposes of this section, the following definitions have the following meanings.
- (1) Commissioner--the commissioner of education. As the commissioner is an employee of the Texas Education Agency (TEA), any provisions that apply to TEA employees apply to the commissioner.
  - (2) Official act or official action--a vote, decision, recommendation, approval, disapproval, or other action, including inaction, that involves the use of discretionary authority.
  - (3) Permanent School Fund (PSF) service provider--any person who provides services to the PSF or relating to the management or investment of the PSF, including, but not limited to, external investment managers and consultants, banks, custodians, and professional services (attorneys, accountants, etc.). Notwithstanding the foregoing, for all purposes under this section, the term PSF service provider excludes State Board of Education (SBOE) members, TEA employees, and private fund managers. PSF service providers who provide services to the Texas PSF Corporation are covered by the Texas PSF Corporation's ethics policy.
  - (4) Personal securities transactions--
    - (A) transactions for a member's or employee's own account, including an individual retirement account; or
    - (B) transactions for an account, other than an account over which the member or employee has no direct or indirect influence or control, in which the member or employee (or the member's or employee's spouse, minor child, or other dependent relative):
      - (i) is an income or principal beneficiary or other equity owner of the account; or

- (ii) receives compensation for managing the account for the benefit of persons other than the member or employee or his or her family.
- (5) Private fund manager--a person who controls a non-publicly traded investment fund or other investment vehicle (including, but not limited to, a partnership, limited liability company, trust, association, or other entity) in which the PSF is invested. A private fund manager may include the vehicle's sponsor, general partner, managing member, manager, advisor, or other agent thereof. For purposes of this section, private fund managers are not considered to be PSF service providers.
- (6) Publicly traded securities--securities of a class that is listed on a national securities exchange or quoted on the NASDAQ national market system in the United States or that is publicly traded on any foreign stock exchange or other foreign market.
- (7) Relative--an individual related within the third degree by consanguinity (blood relative) or the second degree by affinity (marriage) determined in accordance with Texas Government Code, §§573.021-573.025. For purposes of this definition:
  - (A) examples of a relative within the third degree by consanguinity are a child, grandchild, great-grandchild, parent, grandparent, great-grandparent, brother, sister, uncle, aunt, niece, or nephew;
  - (B) examples of a relative within the second degree by affinity are a spouse, an individual related to a spouse within the second degree by consanguinity, or a spouse of such an individual;
  - (C) an individual adopted into a family is considered a relative on the same basis as a natural born family member; and
  - (D) an individual is considered a spouse even if the marriage has been dissolved by death or divorce if there are surviving children of that marriage.
- (8) Texas Education Agency (TEA) employee--a person employed by TEA who provides advice to the SBOE, commissioner, or TEA concerning the PSF.
- (b) General principles. Under Texas Education Code (TEC), §43.0031, members of the SBOE, the commissioner, TEA employees, and persons providing services to the SBOE relating to the PSF are subject to general ethical standards relating to the PSF. The PSF is held in public trust for the benefit of the schoolchildren of Texas. The members of the SBOE serve as fiduciaries of the PSF in accordance with the Texas Constitution, Article VII, §5(f). SBOE members or anyone acting on their behalf shall aspire to the highest standards of ethical conduct and shall comply with the provisions of this section, the Texas Constitution, Texas statutes, and all other applicable provisions governing the responsibilities of a fiduciary.
- (c) General ethical standards.
  - (1) SBOE members must comply with all laws applicable to them, which may include one or more of the following statutes: Texas Government Code, §572.051 (Standards of Conduct; State Agency Ethics Policy), §552.352 (Distribution or Misuse of Confidential Information), §572.002 (General Definitions), §572.004 (Definition: Regulation), §572.054 (Representation by Former Officer or Employee of Regulatory Agency Restricted; Criminal Offense), §572.058 (Private Interest in Measure or Decision; Disclosure; Removal from Office for Violation), §572.021 (Financial Statement Required), §2252.908 (Disclosure of Interested Parties), Chapter 573 (Degrees of Relationship; Nepotism Prohibitions), and Chapter 305 (Registration of Lobbyists); Texas Penal Code, Chapter 36 (Bribery and Corrupt Influence) and Chapter 39 (Abuse of Office); and TEC, §43.0032 (Conflicts of Interest) and §43.0033 (Reports of Expenditures). The omission of any applicable statute listed in this paragraph does not excuse violation of its provisions.
  - (2) SBOE members must be honest in the exercise of their duties and must not take actions that will discredit the PSF.
  - (3) SBOE members shall be loyal to the interests of the PSF to the extent that such loyalty is not in conflict with other duties that legally have priority.



(4) SBOE members shall not use nonpublic information gained through their relationship with the PSF to seek or obtain personal gain beyond agreed compensation and/or any properly authorized expense reimbursement. This should not be interpreted to forbid the use of PSF as a reference or the communication to others of the fact that a relationship with PSF exists, provided that no misrepresentation is involved.

(5) This section is adopted to satisfy the requirements of TEC, §43.0031.

(d) Conflicts of interest.

(1) A conflict of interest exists whenever SBOE members, the commissioner, or TEA employees have business, commercial, or other relationships, including, but not limited to, personal and private relationships, that could reasonably be expected to diminish their independence of judgment in the performance of their duties. Conflicts include, but are not limited to, beneficial interests in securities, corporate memberships, trustee positions, familial relationships, or other special relationships that could reasonably be considered a conflict of interest with the fiduciary duties to the PSF. Further, TEC, §43.0032, requires disclosure and no participation in a matter affected by the possible conflict of interest, unless a waiver is granted, when an SBOE member, the commissioner, a TEA employee, or a person who provides services to the SBOE that relate to management or investment of the PSF has a business, commercial, or other relationship that could reasonably be expected to diminish a person's independence of judgment in the performance of the person's responsibilities relating to the PSF. Such business, commercial, or other relationship is defined to be a relationship that is prohibited under Texas Government Code, §572.051, or that would require public disclosure under Texas Government Code, §572.058, or a relationship that does not rise to this level but that is determined by the SBOE to create an unacceptable risk to the integrity and reputation of the PSF investment program.

(2) Any person who has a possible conflict of interest as defined in paragraph (1) of this subsection shall, upon discovery, promptly disclose the possible conflict to the commissioner and the chair and vice chair of the SBOE on a disclosure form prescribed by the commissioner.

(e) Prohibited transactions and interests. SBOE members, the commissioner, and TEA employees may not:

(1) engage in any personal securities transaction when the person has actual knowledge that the Texas PSF Corporation is trading such securities or has acquired information through his or her position that is not otherwise available to the public. An SBOE member, the commissioner, or a TEA employee may otherwise buy or sell a publicly traded security of an issuer that is held by the Texas PSF Corporation;

(2) accept or solicit any gifts, favors, services, or benefits that might reasonably tend to influence the person in the discharge of his or her duties for the PSF or that the person knows, or should know, is being offered with the intent to influence the person's conduct on behalf of the PSF;

(3) accept employment or engage in a business or professional activity while serving as an SBOE member or a TEA employee that the member or employee might reasonably expect would require or induce the member or employee to disclose confidential information acquired by reason of his or her position concerning the PSF;

(4) accept employment or compensation while serving as a member or employee that could reasonably be expected to impair the member's or employee's independence of judgment in the performance of his or her duties;

(5) make personal investments that could reasonably be expected to create a substantial conflict of interest between the member's or employee's private interest and the interests of the PSF;

(6) intentionally or knowingly solicit, accept, or agree to accept any gifts, favors, services, or benefits for the exercise of the member's or employee's authority or performance of the member's or employee's duties;

(7) purchase, sell, exchange, or lease property to or from the Texas PSF Corporation if such person holds an interest in the property (whether direct or indirect);

- (8) purchase, sell, or exchange any interest in an entity with the Texas PSF Corporation if such person holds an interest in the entity (whether direct or indirect);
- (9) accept offers, under any circumstances, by reason of their official position to trade in any security or other investment on terms more favorable than those available to the general investing public or, in the case of private market investments, a similarly situated investor;
- (10) lend to or borrow from the Texas PSF Corporation, PSF service providers, private fund managers, or other third parties with which the Texas PSF Corporation has a business relationship, unless such entities are normally engaged in such lending in the usual course of their business, and then only on customary terms offered to others under similar circumstances to finance proper and usual activities; or
- (11) act as a representative or agent of a third party, including a PSF service provider or private fund manager, in connection with the acquisition of services or an investment for the Texas PSF Corporation.
- (f) Gifts and entertainment. An SBOE member, the commissioner, or a TEA employee (or the spouse, minor child, or dependent relative thereof) may not:
  - (1) accept any gift or benefit, unless such gift is a permissible gift as defined in subsection (g) of this section;
  - (2) solicit, offer, or accept a gift or benefit (for the personal benefit of the member or employee or for the benefit of a third party), regardless of whether it is a permissible gift, that the member or employee knows, or should know, is being offered or given because of the member's or employee's official position, in exchange for an official act, or with the intent to influence the member's or employee's conduct on behalf of the PSF;
  - (3) solicit, accept, or agree to accept an honorarium in consideration for services that the member or employee would not have been requested to provide but for his or her official position or duties;
  - (4) accept any gift or benefit from a lobbyist, or a person who is required to be registered as a lobbyist, that is not expressly permitted by Texas Government Code, Chapter 305; or
  - (5) accept a gift or benefit if the source of the gift or benefit is not identified or if the member or employee knows, or has reason to know, that a prohibited gift is being offered through an intermediary.
- (g) Definition of permissible gift. The term "permissible gift" means a gift or benefit that is offered or accepted in compliance with all applicable statutes and rules and is one of the following:
  - (1) an occasional gift that is not cash or money, including checks, gift cards, or negotiable instruments, and does not exceed \$50 in value;
  - (2) food, lodging, entertainment, and transportation, if accepted as a guest (i.e., the donor is present) and, if required, the member or employee reports the gift as required by law;
  - (3) an item is given in the context of a personal relationship, such as kinship, or a professional or business relationship that is independent of the member's or employee's official capacity; or
  - (4) transportation, lodging, and meals in connection with attendance at a conference or similar event in which the member or employee renders services, such as speaking, if the services are more than perfunctory.
- (h) Receipt of prohibited gift. A member or employee who receives a gift that is not a permissible gift should return the gift to its source or, if that is not possible or feasible, donate the gift to a recognized tax-exempt charitable organization or governmental entity.
- (i) Contributions and solicitation of support.
  - (1) All SBOE members, the commissioner, and TEA employees (and their respective agents) shall follow all applicable laws governing campaign contributions, including, without limitation, the

rules promulgated by the Securities and Exchange Commission relating to political contributions by certain investment advisors.

(2) An SBOE member shall not request that a PSF service provider or private fund manager make any gift or donation to a school or other charitable interest on behalf of or at the request of a member.

(j) Compliance and enforcement.

(1) The SBOE will enforce this section through its chair or vice chair or the commissioner.

(2) Any violation of this section will be reported to the chair and vice chair of the SBOE and the commissioner, and a recommended action will be presented to the SBOE by the chair of the SBOE or the commissioner.

(3) The ethics advisor of TEA shall respond to inquiries from SBOE members, the commissioner, and TEA employees concerning the provisions of this section. The ethics advisor may confer with the general counsel.

(k) Ethics training. The SBOE shall receive annual training regarding state ethics laws through the Texas Ethics Commission or TEA's ethics advisor. TEA employees shall complete all ethics training required by TEA.

### **§33.6. Bond Guarantee Program for School Districts.**

(a) Statutory provision. The commissioner of education must administer the guarantee program for school district bonds according to the provisions of Texas Education Code (TEC), Chapter 45, Subchapter C.

(b) Definitions. The following definitions apply to the guarantee program for school district bonds.

(1) Annual debt service--payments of principal and interest on outstanding bonded debt scheduled to occur between September 1 and August 31 during the fiscal year in which the guarantee is sought as reported by the Municipal Advisory Council (MAC) of Texas or its successor, if the district has outstanding bonded indebtedness.

(A) The annual debt service will be determined by the current report of the bonded indebtedness of the district as reported by the MAC of Texas or its successor as of the date of the application deadline.

(B) The annual debt service does not include:

(i) the amount of debt service to be paid on the bonds for which the reservation is sought; or

(ii) the amount of debt service attributable to any debt that is no longer outstanding at the application deadline, provided that the Texas Education Agency (TEA) has sufficient evidence of the discharge or defeasance of such debt.

(C) Solely for the purpose of this calculation, the debt service amounts for variable rate bonds will be those that are published in the final official statement, or if there is no official statement, debt service amounts based on the maximum rate permitted by the bond order or other bond proceeding that establishes a maximum interest rate for the bonds.

(2) Application deadline--the last business day of the month in which an application for a guarantee is filed. Applications must be submitted electronically through the website of the MAC of Texas or its successor by 5:00 p.m. on the last business day of the month to be considered in that month's application processing.

(3) Average daily attendance (ADA)--total refined average daily attendance as defined by TEC, §42.005.

(4) Bond--a debt security issuance approved by the attorney general, issued under TEC, §45.003 or §45.004, to provide long-term financing with a maturity schedule of at least three years.

- (5) Bond Guarantee Program (BGP)--the guarantee program that is described by this section and established under TEC, Chapter 45, Subchapter C.
- (6) Bond order--the order adopted by the governing body of a school district that authorizes the issuance of bonds and the pricing certificate, if any, establishing the terms of the bonds executed pursuant to such order.
- (7) Combination issue--an issuance of bonds for which an application for a guarantee is filed that includes both a new money portion and a refunding portion, as permitted by the Texas Government Code, Chapter 1207. The eligibility of combination issues for the guarantee is limited by the eligibility of the new money and refunding portions as defined in this subsection.
- (8) Enrollment growth--growth in student enrollment, as defined by §129.1025 of this title (relating to Adoption by Reference: Student Attendance Accounting Handbook), that has occurred over the previous five school years.
- (9) Nationally recognized investment rating firm--an investment rating firm that is designated by the United States Securities and Exchange Commission as a nationally recognized statistical rating organization (NRSRO) and is demonstrating that it has:
- (A) had its current NRSRO designation for at least three consecutive years;
  - (B) provided credit ratings to each of the following:
    - (i) fifteen or more fixed income securities denominated in United States dollars and issued during the immediately preceding three years; and
    - (ii) ten or more school districts in the United States; and
  - (C) a documented separation of duties between employees involved in credit analysis and employees involved in business relationships with clients.
- (10) New money issue--an issuance of bonds for the purposes of constructing, renovating, acquiring, and equipping school buildings; the purchase of property; or the purchase of school buses. An issuance of bonds for the purpose of constructing teacher or student housing is eligible for the guarantee for new money only if it is an integral part of the educational mission of the school district as determined by the commissioner. Eligibility for the guarantee for new money issues is limited to the issuance of bonds authorized under TEC, §45.003. A new money issue does not include the issuance of bonds to purchase a facility from a public facility corporation created by the school district or to purchase any property that is currently under a lease-purchase contract under the Local Government Code, Chapter 271, Subchapter A. A new money issue does not include an issuance of bonds to refinance any type of maintenance tax-supported debt. Maintenance tax-supported debt includes, but is not limited to:
- (A) time warrants or loans entered under TEC, Chapter 45, Subchapter E; or
  - (B) any other type of loan or warrant that is not supported by bond taxes as defined by TEC, §45.003.
- (11) Notes issued to provide interim financing--an issuance of notes, including commercial paper notes, designed to provide short-term financing for the purposes of constructing, renovating, acquiring, and equipping school buildings; the purchase of property; or the purchase of school buses. For notes to be eligible for the guarantee under this section, the notes must be:
- (A) issued to pay costs for which bonds have been authorized at an election occurring before the issuance of the notes;
  - (B) approved by the attorney general or issued in accordance with proceedings that have been approved by the attorney general; and
  - (C) refunded by bonds issued to provide long-term financing no more than three years from the date of issuance of such notes, provided that the date of issuance of notes will be determined by reference to the date on which the notes were issued for capital

expenditures and the intervening date or dates of issuance of any notes issued to refinance outstanding notes will be disregarded.

- (12) Refunding issue--an issuance of bonds for the purpose of refunding bonds, including notes issued to provide interim financing, that are supported by bond taxes as defined by TEC, §45.003. Eligibility for the guarantee for refunding issues is limited to refunding issues that refund bonds, including notes issued to provide interim financing, that were authorized by a bond election under TEC, §45.003.
- (13) Total debt service--total outstanding principal and interest on bonded debt.
- (A) The total debt service will be determined by the current report of the bonded indebtedness of the district as reported by the MAC of Texas or its successor as of the date of the application deadline, if the district has outstanding bonded indebtedness.
- (B) The total debt service does not include:
- (i) the amount of debt service to be paid on the bonds for which the reservation is sought; or
- (ii) the amount of debt service attributable to any debt that is no longer outstanding at the application deadline, provided that TEA has sufficient evidence of the discharge or defeasance of such debt.
- (C) Solely for the purpose of this calculation, the debt service amounts for variable rate bonds will be those that are published in the final official statement, or if there is no official statement, debt service amounts based on the maximum rate permitted by the bond order or other bond proceeding that establishes a maximum interest rate for the bonds.

(c) Data sources.

- (1) The following data sources will be used for purposes of prioritization:
- (A) projected ADA for the current school year as adopted by the legislature for appropriations purposes;
- (B) final property values certified by the comptroller of public accounts, as described in the Texas Government Code, Chapter 403, Subchapter M, for the tax year preceding the year in which the bonds will be issued. If final property values are unavailable, the most recent projection of property values by the comptroller, as described in the Texas Government Code, Chapter 403, Subchapter M, will be used;
- (C) debt service information reported by the MAC of Texas or its successor as of the date of the application deadline; and
- (D) enrollment information reported to the Public Education Information Management System (PEIMS) for the five-year time period ending in the year before the application date.
- (2) The commissioner may consider adjustments to data values determined to be erroneous or not reflective of current conditions before the deadline for receipt of applications for that application cycle.

(d) Bond eligibility.

- (1) Only those combination, new money, and refunding issues as defined in subsection (b)(7), (10), and (12), respectively, of this section are eligible to receive the guarantee.
- (2) Refunding issues must comply with the following requirements to retain eligibility for the guarantee for the refunding bonds, except that subparagraph (C) of this paragraph does not apply to a refunding issue that provides long-term financing for notes issued to provide interim financing.

- (A) As with any district applying for approval for the guarantee, the district issuing the refunding bonds must meet the requirements for initial approval specified in subsection (g)(2)(A) of this section.
- (B) The bonds to be refunded must have been:
- (i) previously guaranteed by the Permanent School Fund (PSF) or approved for credit enhancement under §61.1038 of this title (relating to School District Bond Enhancement Program);
  - (ii) issued on or after November 1, 2008, and before January 1, 2010; or
  - (iii) issued as notes to provide interim financing as defined in subsection (b)(11) of this section.
- (C) The district must demonstrate that issuing the refunding bond(s) will result in a present value savings to the district and that the refunding bond or bonds will not have a maturity date later than the final maturity date of the bonds being refunded. Present value savings is determined by computing the net present value of the difference between each scheduled payment on the original bonds and each scheduled payment on the refunding bonds. Present value savings must be computed at the true interest cost of the refunding bonds. If the commissioner approves refunding bonds for the guarantee based on evidence of present value savings but at the time of the sale of the refunding bonds a present value savings is not realized, the commissioner may revoke the approval of the bonds for the guarantee.
- (D) The refunding transaction must comply with the provisions of subsection (g)(4)(A)-(C) of this section.
- (3) If a district files an application for a combination issue, the application will be treated as an application for a single issue for the purposes of eligibility for the guarantee. A guarantee for the combination issue will be awarded only if both the new money portion and the refunding portion meet all of the applicable eligibility requirements described in this section. As part of its application, the applicant district must present data that demonstrate compliance for both the new money portion of the issue and the refunding portion of the issue.
- (4) If the commissioner determines that an applicant has deliberately misrepresented information related to a bond issue to secure a guarantee, the commissioner must revoke the approval of the bonds for the guarantee.
- (e) Determination of PSF capacity to guarantee bonds.
- (1) Each month the commissioner will estimate the available capacity of the PSF. If necessary, the commissioner will confirm that the PSF has sufficient capacity to guarantee the bonds before the issuance of the final approval for the guarantee in accordance with subsection (g)(3) of this section. The calculation of capacity will be based on a multiplier of three and one-half times the cost value of the PSF with the proviso that under no circumstances could the capacity of the fund exceed the limits set by federal regulation. The commissioner may increase or decrease the multiplier to prudently manage fund capacity and preserve the AAA credit rating of the PSF. Changes to the multiplier made by the commissioner are to be ratified or rejected by the State Board of Education (SBOE) at the next meeting for which the item can be posted.
  - (2) The SBOE may establish an amount of capacity to be held in reserve of up to 5.0% of the fund's capacity. The amount to be held in reserve may be increased or decreased by a majority vote of the SBOE based on changes in the cost value asset allocation and risk in the portfolio, or may be increased or decreased by the commissioner as necessary to prudently manage fund capacity and preserve the AAA credit rating of the PSF. Changes to the amount held in reserve made by the commissioner are to be ratified or rejected by the SBOE at the next meeting for which the item can be posted.

- (3) The net capacity of the PSF to guarantee bonds is determined by subtracting the amount to be held in reserve, as determined under paragraph (2) of this subsection, from the total available capacity, as described in paragraph (1) of this subsection.
- (f) Application process and application processing.
- (1) Application submission and fee. A district must apply to the commissioner for the guarantee of eligible bonds or the credit enhancement of eligible bonds as authorized under §61.1038 of this title by submitting an application electronically through the website of the MAC of Texas or its successor. The district must submit the information required under TEC, §45.055(b), and this section and any additional information the commissioner may require. The application and all additional information required by the commissioner must be received before the application will be processed. The district may not submit an application for a guarantee or credit enhancement before the successful passage of an authorizing proposition.
- (A) The application fee is \$1,500.
- (B) The fee is due at the time the application for the guarantee or the credit enhancement is submitted. An application will not be processed until the fee has been remitted according to the directions provided on the website of the MAC of Texas or its successor and received by TEA.
- (C) The fee will not be refunded to a district that:
- (i) is not approved for the guarantee or the credit enhancement; or
- (ii) does not sell its bonds before the expiration of its approval for the guarantee or the credit enhancement.
- (D) The fee may be transferred to a subsequent application for the guarantee or the credit enhancement by the district if the district withdraws its application and submits the subsequent application before the expiration of its approval for the guarantee or the credit enhancement.
- (2) Application prioritization and processing. Applications will be prioritized based on districts' property wealth per ADA, with the application of a district with a lower property wealth per ADA prioritized before that of a district with a higher property wealth per ADA. Applications may also be prioritized for districts that experience unforeseen catastrophes or emergencies that require the renovation or replacement of school facilities as described in TEC, §44.031(h). All applications received during a calendar month will be held until up to the 15th business day of the subsequent month. On or before the 15th business day of each month, the commissioner will announce the results of the prioritization and process applications for initial approval for the guarantee, up to the available net capacity as of the application deadline, subject to the requirements of this section.
- (A) Approval for guarantees will be awarded each month beginning with the districts with the lowest property wealth per ADA until the PSF reaches its net capacity to guarantee bonds.
- (B) Approval for guarantees will be awarded based on the fund's capacity to fully guarantee the bond issue for which the guarantee is sought. Applications for bond issues that cannot be fully guaranteed will not receive an award. The amount of bond issue for which the guarantee was requested may not be modified after the monthly application deadline for the purposes of securing the guarantee during the award process. If PSF net capacity has been exhausted, the commissioner will process the application for approval of the credit enhancement as specified in §61.1038 of this title.
- (C) The actual guarantee of the bonds is subject to the approval process prescribed in subsection (g) of this section.
- (D) An applicant school district is ineligible for consideration for the guarantee if its lowest credit rating from any nationally recognized investment rating firm as defined in subsection (b)(9) of this section is the same as or higher than that of the PSF.

- (3) Late application. An application received after the application deadline will be considered a valid application for the subsequent month, unless withdrawn by the submitting district before the end of the subsequent month.
  - (4) Notice of application status. Each district that submits a valid application will be notified of the application status within 15 business days of the application deadline.
  - (5) Reapplication. If a district does not receive approval for the guarantee or for any reason does not receive approval of the bonds from the attorney general within the time period specified in subsection (g)(4) of this section, the district may reapply in a subsequent month. Applications that were denied approval for the guarantee will not be retained for consideration in subsequent months.
- (g) Approval for the guarantee; district responsibilities on receipt of approval.
- (1) Initial and final approval provisions.
    - (A) If, during the monthly estimation of PSF capacity described in subsection (e)(1) of this section, the commissioner determines that the available capacity of the PSF is 10% or less, the commissioner may require an applicant school district to obtain final approval for the guarantee as described in paragraph (3) of this subsection.
    - (B) If the commissioner has not made such a determination:
      - (i) the commissioner will consider the initial approval described in paragraph (2) of this subsection as both the initial and final approval; and
      - (ii) an applicant school district that has received notification of initial approval for the guarantee, as described in paragraph (2) of this subsection, may consider that notification as notification of initial and final approval for the guarantee and may complete the sale of the applicable bonds.
  - (2) Initial approval.
    - (A) The following provisions apply to all applications for the guarantee, regardless of whether an application is for a new money, refunding, or combination issue. Under TEC, §45.056, the commissioner will investigate the applicant school district's accreditation status and financial status. A district must be accredited and financially sound to be eligible for initial approval by the commissioner. The commissioner's review will include the following:
      - (i) the purpose of the bond issue;
      - (ii) the district's accreditation status as defined by §97.1055 of this title (relating to Accreditation Status) in accordance with the following:
        - (I) if the district's accreditation status is Accredited, the district will be eligible for consideration for the guarantee;
        - (II) if the district's accreditation status is Accredited-Warning or Accredited-Probation, the commissioner will investigate the underlying reason for the accreditation rating to determine whether the accreditation rating is related to the district's financial soundness. If the accreditation rating is related to the district's financial soundness, the district will not be eligible for consideration for the guarantee; or
        - (III) if the district's accreditation status is Not Accredited-Revoked, the district will not be eligible for consideration for the guarantee;
      - (iii) the district's compliance with statutes and rules of TEA; and
      - (iv) the district's financial status and stability, regardless of the district's accreditation rating, including approval of the bonds by the attorney general under the provisions of TEC, §45.0031 and §45.005.



- (B) The following limitation applies to applications for new money issues of bonds for which the election authorizing the issuance of the bonds was called after July 15, 2004. The commissioner will limit approval for the guarantee to a district that has, at the time of the application for the guarantee, less than 90% of the annual debt service of the district with the highest annual debt service per ADA, as determined by the commissioner annually, or less than 90% of the total debt service of the district with the highest total debt service per ADA, as determined by the commissioner annually. The limitation will not apply to school districts that have enrollment growth, as defined in subsection (b)(8) of this section, of at least 25%, based on PEIMS data on enrollment available at the time of application. The annual debt service amount is the amount defined by subsection (b)(1) of this section. The total debt service amount is the amount defined by subsection (b)(13) of this section.
- (C) The commissioner will grant or deny initial approval for the guarantee based on the review described in subparagraph (A) of this paragraph and the limitation described in subparagraph (B) of this paragraph and will provide an applicant district whose application has received initial approval for the guarantee written notice of initial approval.
- (3) Final approval. The provisions of this paragraph apply only as described in paragraph (1) of this subsection. A district must receive final approval before completing the sale of the bonds for which the district has received notification of initial approval.
- (A) A district that has received initial approval must provide a written notice to TEA two business days before issuing a preliminary official statement (POS) for the bonds that are eligible for the guarantee or two business days before soliciting investment offers, if the bonds will be privately placed without the use of a POS.
- (i) The district must receive written confirmation from TEA that the capacity continues to be available before proceeding with the public or private offer to sell bonds.
- (ii) TEA will provide this notification within one business day of receiving the notice of the POS or notice of other solicitation offers to sell the bonds.
- (B) A district that received confirmation from TEA in accordance with subparagraph (A) of this paragraph must provide written notice to TEA of the placement of an item to approve the bond sale on the agenda of a meeting of the school board of trustees no later than two business days before the meeting. If the bond sale is completed pursuant to a delegation by the board to a pricing officer or committee, notice must be given to TEA no later than two business days before the execution of a bond purchase agreement by such pricing officer or committee.
- (i) The district must receive written confirmation from TEA that the capacity continues to be available for the bond sale before the approval of the sale by the school board of trustees or by the pricing officer or committee.
- (ii) TEA will provide this notification within one business day before the date that the district expects to complete the sale by official action of the board or of a pricing officer or committee.
- (C) TEA will process requests for final approval from districts that have received initial approval on a first come, first served basis. Requests for final approval must be received before the expiration of the initial approval.
- (D) A district may provide written notification as required by this paragraph by facsimile transmission or by email in a manner prescribed by the commissioner.
- (4) District responsibilities on receipt of approval.
- (A) Once a district is awarded initial approval for the guarantee, each issuance of the bonds must be approved by the attorney general within 180 days of the date of the letter

granting the approval for the guarantee. The initial approval for the guarantee will expire at the end of the 180-day period. The commissioner may extend the 180-day period, based on extraordinary circumstances, on receiving a written request from the district or the attorney general before the expiration of the 180-day period.

- (B) If the bonds are not approved by the attorney general within 180 days of the date of the letter granting the approval for the guarantee, the commissioner will consider the application withdrawn, and the district must reapply for a guarantee.
- (C) If applicable, the district must comply with the provisions for final approval described in paragraph (3) of this subsection to maintain approval for the guarantee.
- (D) A district may not represent bonds as guaranteed for the purpose of pricing or marketing the bonds before the date of the letter granting approval for the guarantee.

(h) Financial exigency. The following provisions describe how a declaration of financial exigency under §109.2001 of this title (relating to Financial Exigency) affects a district's application for guarantee approval or a district's previously granted approval.

- (1) Application for guarantee of new money issue. The commissioner will deny approval of an application for the guarantee of a new money issue if the applicant school district has declared a state of financial exigency for the district's current fiscal year. The denial of approval will be in effect for the duration of the applicable fiscal year unless the district can demonstrate financial stability.
- (2) Approval granted before declaration. If in a given district's fiscal year the commissioner grants approval for the guarantee of a new money issue and the school district subsequently declares a state of financial exigency for that same fiscal year, the district must immediately notify the commissioner and may not offer the bonds for sale unless the commissioner determines that the district may proceed.
- (3) Application for guarantee of refunding issue. The commissioner will consider an application for the guarantee of a refunding issue that meets all applicable requirements specified in this section even if the applicant school district has declared a state of financial exigency for the district's current fiscal year. In addition to fulfilling all applicable requirements specified in this section, the applicant school district must also describe, in its application, the reason financial exigency was declared and how the refunding issue will support the district's financial recovery plan.

(i) Allocation of specific holdings. If necessary to successfully operate the BGP, the commissioner may allocate specific holdings of the PSF to specific bond issues guaranteed under this section. This allocation will not prejudice the right of the SBOE to dispose of the holdings according to law and requirements applicable to the fund; however, the SBOE will ensure that holdings of the PSF are available for a substitute allocation sufficient to meet the purposes of the initial allocation. This allocation will not affect any rights of the bond holders under law.

(j) Defeasance. The guarantee will be completely removed when bonds guaranteed by the BGP are defeased, and such a provision must be specifically stated in the bond order. If bonds guaranteed by the BGP are defeased, the district must notify the commissioner in writing within ten calendar days of the action.

(k) Bonds issued before August 15, 1993. For bonds issued before August 15, 1993, a school district seeking the guarantee of eligible bonds must certify that, on the date of issuance of any bond, no funds received by the district from the Available School Fund (ASF) are reasonably expected to be used directly or indirectly to pay the principal or interest on, or the tender or retirement price of, any bond of the political subdivision or to fund a reserve or placement fund for any such bond.

(l) Bonds guaranteed before December 1, 1993. For bonds guaranteed before December 1, 1993, if a school district cannot pay the maturing or matured principal or interest on a guaranteed bond, the commissioner will cause the amount needed to pay the principal or interest to be transferred to the district's paying agent solely from the PSF and not from the ASF. The commissioner also will direct the comptroller of public accounts to withhold the amount paid, plus interest, from the first state money payable to the district, excluding payments from the ASF.

- (m) Bonds issued after August 15, 1993, and guaranteed on or after December 1, 1993. If a school district cannot pay the maturing or matured principal or interest on a guaranteed bond, the commissioner will cause the amount needed to pay the principal or interest to be transferred to the district's paying agent from the PSF. The commissioner also will direct the comptroller of public accounts to withhold the amount paid, plus interest, from the first state money payable to the district, regardless of source, including the ASF.
- (n) Payments. For purposes of the provisions of TEC, Chapter 45, Subchapter C, matured principal and interest payments are limited to amounts due on guaranteed bonds at scheduled maturity, at scheduled interest payment dates, and at dates when bonds are subject to mandatory redemption, including extraordinary mandatory redemption, in accordance with the terms of the bond order. All such payment dates, including mandatory redemption dates, must be specified in the bond order or other document pursuant to which the bonds initially are issued. Without limiting the provisions of this subsection, payments attributable to an optional redemption or a right granted to a bondholder to demand payment on a tender of such bonds according to the terms of the bonds do not constitute matured principal and interest payments.
- (o) Guarantee restrictions. The guarantee provided for eligible bonds under the provisions of TEC, Chapter 45, Subchapter C, is restricted to matured bond principal and interest. The guarantee applies to all matured interest on eligible bonds, whether the bonds were issued with a fixed or variable interest rate and whether the interest rate changes as a result of an interest reset provision or other bond order provision requiring an interest rate change. The guarantee does not extend to any obligation of a district under any agreement with a third party relating to bonds that is defined or described in state law as a "bond enhancement agreement" or a "credit agreement," unless the right to payment of such third party is directly as a result of such third party being a bondholder.
- (p) Notice of default. A school district that has determined that it is or will be unable to pay maturing or matured principal or interest on a guaranteed bond must immediately, but not later than the fifth business day before maturity date, notify the commissioner.
- (q) Payment from PSF.
- (1) Immediately after the commissioner receives the notice described in subsection (p) of this section, the commissioner will instruct the comptroller to transfer from the appropriate account in the PSF to the district's paying agent the amount necessary to pay the maturing or matured principal or interest.
- (2) Immediately after receipt of the funds for payment of the principal or interest, the paying agent must pay the amount due and forward the canceled bond or coupon to the comptroller. The comptroller will hold the canceled bond or coupon on behalf of the PSF.
- (3) Following full reimbursement to the PSF with interest, the comptroller will further cancel the bond or coupon and forward it to the school district for which payment was made. Interest will be charged at the rate determined under the Texas Government Code, §2251.025(b). Interest will accrue as specified in the Texas Government Code, §2251.025(a) and (c).
- (r) Bonds not accelerated on default. If a school district fails to pay principal or interest on a guaranteed bond when it matures, other amounts not yet mature are not accelerated and do not become due by virtue of the school district's default.
- (s) Reimbursement of PSF. If payment from the PSF is made on behalf of a school district, the school district must reimburse the amount of the payment, plus interest, in accordance with the requirements of TEC, §45.061.
- (t) Repeated failure to pay. If a total of two or more payments are made under the BGP or the credit enhancement program authorized under §61.1038 of this title on the bonds of a school district, the commissioner will take action in accordance with the provisions of TEC, §45.062.

### **§33.7. Bond Guarantee Program for Charter Schools.**

- (a) Statutory provision. The commissioner of education must administer the guarantee program for open-enrollment charter school bonds according to the provisions of Texas Education Code (TEC), Chapter 45, Subchapter C.

- (b) Definitions. The following definitions apply to the guarantee program for open-enrollment charter school bonds.
- (1) Amortization expense--the annual expense of any debt and/or loan obligations.
  - (2) Annual debt service--payments of principal and noncapitalized interest on outstanding bonded debt scheduled to occur during a charter district's fiscal year as reported by the Municipal Advisory Council (MAC) of Texas or its successor, if the charter district is responsible for outstanding bonded indebtedness.
    - (A) The annual debt service will be determined by the current report of the bonded indebtedness of the charter district as reported by the MAC of Texas or its successor as of the date of the application deadline.
    - (B) Solely for the purpose of this calculation, the debt service amounts for variable rate bonds will be those that are published in the final official statement or, if there is no official statement, debt service amounts based on the maximum rate permitted by the bond resolution or other bond proceeding that establishes a maximum interest rate for the bonds.
    - (C) Annual debt service includes required payments into a sinking fund as authorized under 26 United States Code (USC) §54A(d)(4)(C), provided that the sinking fund is maintained by a trustee or other entity approved by the commissioner that is not under the control or common control of the charter district.
  - (3) Application deadline--the last business day of the month in which an application for a guarantee is filed. Applications must be submitted electronically through the website of the MAC of Texas or its successor by 5:00 p.m. on the last business day of the month to be considered in that month's application processing. This application deadline does not apply to applications for issues to refund bonds previously guaranteed by the Bond Guarantee Program.
  - (4) Board resolution--the resolution adopted by the governing body of an open-enrollment charter holder that:
    - (A) requests guarantee of bonds through the Bond Guarantee Program; and
    - (B) authorizes the charter holder's administration to pursue bond financing.
  - (5) Bond--a debt security issuance approved by the attorney general, issued under TEC, Chapter 53, to provide long-term financing with a maturity schedule of at least three years.
  - (6) Bond Guarantee Program (BGP)--the guarantee program that is described by this section and established under TEC, Chapter 45, Subchapter C.
  - (7) Bond resolution--the resolution, indenture, or other instrument adopted by the governing body of an issuer of bonds authorizing the issuance of bonds for the benefit of a charter district.
  - (8) Charter district--an open-enrollment charter holder designated as a charter district under subsection (e) of this section, as authorized by TEC, §12.135.
  - (9) Combination issue--an issuance of bonds for which an application for a guarantee is filed that includes both a new money portion and a refunding portion, as permitted by TEC, Chapter 53. The eligibility of combination issues for the guarantee is limited by the eligibility of the new money and refunding portions as defined in this subsection.
  - (10) Debt service coverage ratio--a measure of a charter district's ability to pay interest and principal with cash generated from current operations. The debt service coverage ratio (total debt service coverage on all long-term capital debt) equals the excess of revenues over expenses plus interest expense plus depreciation expense plus amortization expense, all divided by annual debt service. The calculation can be expressed as: (Excess of revenues over expenses + interest expense + depreciation expense + amortization expense)/ annual debt service.
  - (11) Depreciation expense--the audited amount of depreciation that was expensed during the fiscal period.

- (12) Educational facility--a classroom building, laboratory, science building, faculty or administrative office building, or other facility used exclusively for the conduct of the educational and administrative functions of a charter school.
- (13) Foundation School Program (FSP)--the program established under TEC, Chapters 41, 42, and 46, or any successor program of state appropriated funding for school districts in the state of Texas.
- (14) Long-term debt--any debt of the charter district that has a term of greater than three years and is secured on a parity basis with the bonds to be guaranteed.
- (15) Maximum annual debt service--as of any date of calculation, the highest annual debt service requirements with respect to all outstanding long-term debt for any succeeding fiscal year.
- (16) Nationally recognized investment rating firm--an investment rating firm that is designated by the United States Securities and Exchange Commission as a nationally recognized statistical rating organization (NRSRO) and is demonstrating that it has:
- (A) had its current NRSRO designation for at least three consecutive years;
  - (B) provided credit ratings to each of the following:
    - (i) fifteen or more fixed income securities denominated in United States dollars and issued during the immediately preceding three years;
    - (ii) ten or more school districts in the United States;
    - (iii) one or more charter schools in the United States; and
  - (C) a documented separation of duties between employees involved in credit analysis and employees involved in business relationships with clients.
- (17) New money issue--an issuance of revenue bonds under TEC, Chapter 53, for the purposes of:
- (A) the acquisition, construction, repair, or renovation of an educational facility of an open-enrollment charter school and equipping real property of an open-enrollment charter school, provided that any bonds for student or teacher housing must meet the following criteria:
    - (i) the proposed housing is contemplated in the charter or charter application; and
    - (ii) the proposed housing is an essential and integral part of the educational program included in the charter contract; or
  - (B) the refinancing of one or more promissory notes executed by an open-enrollment charter school, each in an amount in excess of \$500,000, that evidence one or more loans from a national or regional bank, nonprofit corporation, or foundation that customarily makes loans to charter schools, the proceeds of which loans were used for a purpose described in subparagraph (A) of this paragraph; or
  - (C) both.
- (18) Open-enrollment charter--this term has the meaning assigned in §100.1001 of this title (relating to Definitions).
- (19) Open-enrollment charter holder--this term has the meaning assigned to the term "charter holder" in TEC, §12.1012.
- (20) Open-enrollment charter school--this term has the meaning assigned to the term "charter school" in §100.1001 of this title.
- (21) Open-enrollment charter school campus--this term has the meaning assigned to the term "charter school campus" in §100.1001 of this title.
- (22) Refunding issue--an issuance of bonds under TEC, Chapter 53, for the purpose of refunding:

- (A) bonds that have previously been issued under that chapter and have previously been approved by the attorney general; or
- (B) bonds that have previously been issued for the benefit of an open-enrollment charter school under Vernon's Civil Statutes, Article 1528m, and have previously been approved by the attorney general.

(c) Bond eligibility.

- (1) Only those combination, new money, and refunding issues as defined in subsection (b)(9), (17), and (22), respectively, of this section are eligible to receive the guarantee. The bonds must, without the guarantee, be rated as investment grade by a nationally recognized investment rating firm and must be issued on or after September 28, 2011.
- (2) Refunding issues must comply with the following requirements to retain eligibility for the guarantee for the refunding bonds.
  - (A) As with any open-enrollment charter holder applying for approval for the guarantee, the charter holder for which the refunding bonds are being issued must meet the requirements for charter district designation specified in subsection (e)(2) of this section and the requirements for initial approval specified in subsection (f)(3)(A) of this section.
  - (B) The charter holder must demonstrate that issuing the refunding bond(s) will result in a present value savings to the charter holder. Present value savings is determined by computing the net present value of the difference between each scheduled payment on the original bonds and each scheduled payment on the refunding bonds. Present value savings must be computed at the true interest cost of the refunding bonds. If the commissioner approves refunding bonds for the guarantee based on evidence of present value savings but at the time of the sale of the refunding bonds a present value savings is not realized, the commissioner may revoke the approval of the bonds for the guarantee.
  - (C) For issues that refund bonds previously guaranteed by the BGP, the charter holder must demonstrate that the refunding bond or bonds will not have a maturity date later than the final maturity date of the bonds being refunded.
  - (D) The refunding transaction must comply with the provisions of subsection (f)(5)(A)-(C) and (E) of this section.
- (3) If an open-enrollment charter holder files an application for a combination issue, the application will be treated as an application for a single issue for the purposes of eligibility for the guarantee. A guarantee for the combination issue will be awarded only if both the new money portion and the refunding portion meet all of the applicable eligibility requirements described in this section. As part of its application, the charter holder making the application must present data that demonstrate compliance for both the new money portion of the issue and the refunding portion of the issue.
- (4) If the commissioner determines that an applicant has deliberately misrepresented information related to a bond issue to secure a guarantee, the commissioner must revoke the approval of the bonds for the guarantee.

(d) Determination of Permanent School Fund (PSF) capacity to guarantee bonds for charter districts.

- (1) Each month the commissioner will estimate the available capacity of the PSF to guarantee bonds for charter districts. This capacity is determined by multiplying the net capacity determined under §33.65 of this title (relating to Bond Guarantee Program for School Districts) by the percentage of the number of students enrolled in open-enrollment charter schools in this state compared to the total number of students enrolled in all public schools in this state, as determined by the commissioner. The commissioner's determination of the number of students enrolled in open-enrollment charter schools in this state and the number of students enrolled in all public schools in this state is based on the enrollment data submitted by school districts and charter schools to the Public Education Information Management System (PEIMS) during the most recent fall PEIMS submission. Annually, the commissioner will post the applicable student enrollment numbers and

the percentage of students enrolled in open-enrollment charter schools on the Texas Education Agency (TEA) web page related to the BGP. The commissioner shall hold up to 5.0% of the charter school available capacity in reserve each month.

- (2) Up to half of the total capacity of the PSF to guarantee bonds for charter districts may be used to guarantee charter district refunding bonds.
- (e) Application process and application processing. An open-enrollment charter holder must apply to the commissioner for the guarantee of eligible bonds by submitting an application electronically through the website of the MAC of Texas or its successor. Before an application for the guarantee will be considered, a charter holder must first be determined by the commissioner to meet criteria for designation as a charter district for purposes of this section. The application submitted through the website of the MAC of Texas or its successor will serve as both a charter holder's application for designation as a charter district and its application for the guarantee.
- (1) Application submission and fee. As part of its application, an open-enrollment charter holder must submit the information required under TEC, §45.055(b), and this section and any additional information the commissioner may require. The application and all additional information required by the commissioner must be received before the application will be processed. The open-enrollment charter holder may not submit an application for a guarantee before the governing body of the charter holder adopts a board resolution as defined in subsection (b)(4) of this section.
- (A) The amount of the application fee is the amount specified in §33.65 of this title.
- (B) The fee is due at the time the application for charter district designation and the guarantee is submitted. An application will not be processed until the fee has been remitted according to the directions provided on the website of the MAC of Texas or its successor and received by TEA.
- (C) The fee will not be refunded to an applicant that:
- (i) is designated a charter district but is not approved for the guarantee; or
- (ii) receives approval for the guarantee but does not sell its bonds before the expiration of its approval for the guarantee.
- (D) The fee may be transferred to a subsequent application for the guarantee by a charter district that has been approved for the guarantee if the charter district withdraws its application and submits the subsequent application before the expiration of its approval for the guarantee.
- (2) Eligibility to be designated a charter district.
- (A) To be designated a charter district and have its application for the guarantee considered by the commissioner, an open-enrollment charter holder must:
- (i) have operated at least one open-enrollment charter school in the state of Texas for at least three years and have had students enrolled in the school for those three years;
- (ii) identify in its application for which open-enrollment charter school and, if applicable, for which open-enrollment charter school campus the bond funds will be used;
- (iii) in its application, agree that the bonded indebtedness for which the guarantee is sought will be undertaken as an obligation of all entities under common control of the open-enrollment charter holder and agree that all such entities will be liable for the obligation if the open-enrollment charter holder defaults on the bonded indebtedness, provided that an entity that does not operate a charter school in Texas is subject to this subparagraph only to the extent that it has received state funds from the open-enrollment charter holder;

- (iv) not have an unresolved corrective action that is more than one year old, unless the open-enrollment charter holder has taken appropriate steps, as determined by the commissioner, to begin resolving the action;
  - (v) have had, for the past three years, an audit as required by §100.1047 of this title (relating to Accounting for State and Federal Funds) that was completed with unqualified or unmodified opinions;
  - (vi) have received an investment grade credit rating from a nationally recognized investment rating firm as defined in subsection (b)(16) of this section as specified by TEC, §45.0541, within the last year; and
  - (vii) not have materially violated a covenant relating to debt obligation in the immediately preceding three years.
- (B) For an open-enrollment charter holder to be designated a charter district and have its application for the guarantee considered by the commissioner, each open-enrollment charter school operated under the charter must not have an accreditation rating of Not Accredited-Revoked and must have a rating of met standard or met alternative standard as its most recent state academic accountability rating. However, if an open-enrollment charter school operated under the charter is not yet rated because the school is in its first year of operation, that fact will not impact the charter holder's eligibility to be designated a charter district and apply for the guarantee.
- (3) Application processing. All applications received during a calendar month that were submitted by open-enrollment charter holders determined to meet the criteria in paragraph (2) of this subsection will be held until the 15th business day of the subsequent month. On the 15th business day of each month, the commissioner will announce the results of the pro rata allocation of available capacity, if pro rata allocation is necessary, and process applications for initial approval for the guarantee, up to the available capacity as of the application deadline, subject to the requirements of this section.
- (A) If the available capacity is insufficient to guarantee the total value of the bonds for all applicant charter districts, the commissioner will allocate the available capacity on a pro rata basis to each applicant charter district. For each applicant, the commissioner will determine the percentage of the total amount of all applicants' proposed bonds that the applicant's proposed bonds represent. The commissioner will then allocate to that applicant the same percentage of the available capacity, but in no event will an allocation be equal to an amount less than \$500,000.
- (B) The actual guarantee of the bonds is subject to the approval process prescribed in subsection (f) of this section.
- (C) An applicant charter district is ineligible for consideration for the guarantee if its lowest credit rating from any nationally recognized investment rating firm as defined in subsection (b)(16) of this section is the same as or higher than that of the PSF.
- (4) Late application. An application received after the application deadline will be considered a valid application for the subsequent month, unless withdrawn by the submitting open-enrollment charter holder before the end of the subsequent month.
- (5) Notice of application status. Each open-enrollment charter holder that submits a valid application will be notified of the application status within 15 business days of the application deadline.
- (6) Reapplication. If an open-enrollment charter holder does not receive designation as a charter district, does not receive approval for the guarantee, or for any reason does not receive approval of the bonds from the attorney general within the time period specified in subsection (f)(5) of this section, the charter holder may reapply in a subsequent month. An application that was denied approval for the guarantee or that was submitted by a charter holder that the commissioner determined did not meet the criteria for charter district designation will not be retained for



consideration in subsequent months. A reapplication fee will be required unless the conditions described in subsection (e)(1)(D) of this section apply to the charter holder.

(f) Approval for the guarantee; charter district responsibilities on receipt of approval.

(1) Approval for the guarantee and charter renewal or amendment.

(A) If an open-enrollment charter holder applies for the guarantee within the 12 months before the charter holder's charter is due to expire, application approval will be contingent on successful renewal of the charter, and the bonds for which the open-enrollment charter holder is applying for the guarantee may not be issued before the successful renewal of the charter.

(B) If an open-enrollment charter holder proposes to use the proceeds of the bonds for which it is applying for the guarantee for an expansion that requires a charter amendment, application approval will be contingent on approval of the amendment, and the bonds may not be issued before approval of the amendment.

(2) Initial and final approval provisions.

(A) The commissioner may require an applicant charter district to obtain final approval for the guarantee as described in paragraph (4) of this subsection if:

(i) during the monthly estimation of PSF capacity described in §33.65 of this title, the commissioner determines that the available capacity of the PSF as described in §33.65 of this title is 10% or less; or

(ii) during the monthly estimation of the available capacity of the PSF to guarantee bonds for charter districts described in subsection (d) of this section, the commissioner determines that the available capacity of the PSF to guarantee bonds for charter districts is 10% or less.

(B) If the commissioner has not made such a determination:

(i) the commissioner will consider the initial approval described in paragraph (3) of this subsection as both the initial and final approval; and

(ii) an applicant charter district that has received notification of initial approval for the guarantee, as described in paragraph (3) of this subsection, may consider that notification as notification of initial and final approval for the guarantee and may complete the sale of the applicable bonds.

(3) Initial approval.

(A) The following provisions apply to all applications for the guarantee, regardless of whether an application is for a new money, refunding, or combination issue. Under TEC, §45.056, the commissioner will investigate the financial status of the applicant charter district and the accreditation status of all open-enrollment charter schools operated under the charter. For the charter district's application to be eligible for initial approval by the commissioner, each open-enrollment charter school operated under the charter must be accredited, and the charter district must be financially sound. The commissioner's review will include review of the following:

(i) the purpose of the bond issue;

(ii) the accreditation status, as defined by §97.1055 of this title (relating to Accreditation Status), of all open-enrollment charter schools operated under the charter in accordance with the following, except that, if an open-enrollment charter school operated under the charter has not yet received an accreditation rating because it is in its first year of operation, that fact will not impact the charter district's eligibility for consideration for the guarantee:

- (I) if the accreditation status of all open-enrollment charter schools operated under the charter is Accredited, the charter district will be eligible for consideration for the guarantee;
- (II) if the accreditation status of any open-enrollment charter school operated under the charter is Accredited-Warning or Accredited-Probation, the commissioner will investigate the underlying reason for the accreditation rating to determine whether the accreditation rating is related to the open-enrollment charter school's financial soundness. If the accreditation rating is related to the open-enrollment charter school's financial soundness, the charter district will not be eligible for consideration for the guarantee; or
- (III) if the accreditation status of any open-enrollment charter school operated under the charter is Not Accredited-Revoked, the charter district will not be eligible for consideration for the guarantee;
- (iii) the charter district's financial status and stability, regardless of each open-enrollment charter school's accreditation rating, including approval of the bonds by the attorney general under the provisions of TEC, §53.40;
- (iv) whether TEA has required the charter district to submit a financial plan under §109.1101 of this title (relating to Financial Solvency Review) in the last three years;
- (v) the audit history of the charter district and of all open-enrollment charter schools operated under the charter;
- (vi) the charter district's compliance with statutes and rules of TEA and with applicable state and federal program requirements and the compliance of all open-enrollment charter schools operated under the charter with these statutes, rules, and requirements;
- (vii) any interventions and sanctions to which the charter district has been subject; to which any of the open-enrollment charter schools operated under the charter has been subject; and, if applicable, to which any of the open-enrollment charter school campuses operated under the charter has been subject;
- (viii) formal complaints received by TEA that have been made against the charter district, against any of the open-enrollment charter schools operated under the charter, or against any of the open-enrollment charter school campuses operated under the charter;
- (ix) the state academic accountability rating of all open-enrollment charter schools operated under the charter and the campus ratings of all open-enrollment charter school campuses operated under the charter;
- (x) any unresolved corrective actions that are less than one year old; and
- (xi) whether the charter district is considered a high-risk grantee by the TEA office responsible for planning, grants, and evaluation.
- (B) The commissioner will limit approval for the guarantee to a charter district with a historical debt service coverage ratio, based on annual debt service, of at least 1.1 for the most recently completed fiscal year and a projected debt service coverage ratio, based on projected revenues and expenses and maximum annual debt service, of at least 1.2. If the bond issuance for which an application has been submitted is the charter district's first bond issuance, the commissioner will evaluate only projected debt service coverage. Projections of revenues and expenses are subject to approval by the commissioner.
- (C) The commissioner will grant or deny initial approval for the guarantee based on the review described in subparagraph (A) of this paragraph and the limitation described in

subparagraph (B) of this paragraph and will provide an applicant charter district whose application has received initial approval for the guarantee written notice of initial approval.

(4) Final approval. The provisions of this paragraph apply only as described in paragraph (2) of this subsection. A charter district must receive final approval before completing the sale of the bonds for which the charter district has received notification of initial approval.

(A) A charter district that has received initial approval must provide a written notice to TEA two business days before issuing a preliminary official statement (POS) for the bonds that are eligible for the guarantee or two business days before soliciting investment offers, if the bonds will be privately placed without the use of a POS.

(i) The charter district must receive written confirmation from TEA that the capacity continues to be available and must continue to meet the requirements of subsection (e)(2) of this section before proceeding with the public or private offer to sell bonds.

(ii) TEA will provide this notification within one business day of receiving the notice of the POS or notice of other solicitation offers to sell the bonds.

(B) A charter district that received confirmation from TEA in accordance with subparagraph (A) of this paragraph must provide written notice to TEA of the placement of an item to approve the bond sale on the agenda of a meeting of the bond issuer's board of directors no later than two business days before the meeting. If the bond sale is completed pursuant to a delegation by the issuer to a pricing officer or committee, notice must be given to TEA no later than two business days before the execution of a bond purchase agreement by such pricing officer or committee.

(i) The charter district must receive written confirmation from TEA that the capacity continues to be available for the bond sale before the approval of the sale by the bond issuer or by the pricing officer or committee.

(ii) TEA will provide this notification within one business day before the date that the bond issuer expects to complete the sale by official action of the bond issuer or of a pricing officer or committee.

(C) TEA will process requests for final approval from charter districts that have received initial approval on a first come, first served basis. Requests for final approval must be received before the expiration of the initial approval.

(D) A charter district may provide written notification as required by this paragraph by facsimile transmission, by email, or in another manner prescribed by the commissioner.

(5) Charter district responsibilities on receipt of approval.

(A) Once a charter district is awarded initial approval for the guarantee, each issuance of the bonds must be approved by the attorney general within 180 days of the date of the letter granting the approval for the guarantee. The initial approval for the guarantee will expire at the end of the 180-day period. The commissioner may extend the 180-day period, based on extraordinary circumstances, on receiving a written request from the charter district or the attorney general before the expiration of the 180-day period.

(B) If applicable, the charter district must comply with the provisions for final approval described in paragraph (4) of this subsection to maintain approval for the guarantee.

(C) If the bonds are not approved by the attorney general within 180 days of the date of the letter granting the approval for the guarantee, the commissioner will consider the application withdrawn, and the charter district must reapply for a guarantee.

(D) A charter district may not represent bonds as guaranteed for the purpose of pricing or marketing the bonds before the date of the letter granting approval for the guarantee.

- (E) The charter district must provide evidence of the final investment grade rating of the bonds to TEA after receiving initial approval but before the distribution of the preliminary official statement for the bonds or, if the bonds are offered in a private placement, before approval of the bond sale by the governing body of the charter district.
- (F) A charter district must identify by legal description any educational facility purchased or improved with bond proceeds no later than 30 days after entering into a binding commitment to expend bond proceeds for that purpose. The charter district must identify at that time whether and to what extent debt service will be paid with any source of revenue other than state funds.
- (g) Allocation of specific holdings. If necessary to successfully operate the BGP, the commissioner may allocate specific holdings of the PSF to specific bond issues guaranteed under this section. This allocation will not prejudice the right of the State Board of Education (SBOE) to dispose of the holdings according to law and requirements applicable to the fund; however, the SBOE will ensure that holdings of the PSF are available for a substitute allocation sufficient to meet the purposes of the initial allocation. This allocation will not affect any rights of the bond holders under law.
- (h) Defeasance. The guarantee will be completely removed when bonds guaranteed by the BGP are defeased, and such a provision must be specifically stated in the bond resolution. If bonds guaranteed by the BGP are defeased, the charter district must notify the commissioner in writing within ten calendar days of the action.
- (i) Payments. For purposes of the provisions of TEC, Chapter 45, Subchapter C, matured principal and interest payments are limited to amounts due on guaranteed bonds at scheduled maturity, at scheduled interest payment dates, and at dates when bonds are subject to mandatory redemption, including extraordinary mandatory redemption, in accordance with their terms. All such payment dates, including mandatory redemption dates, must be specified in the bond order or other document pursuant to which the bonds initially are issued. Without limiting the provisions of this subsection, payments attributable to an optional redemption or a right granted to a bondholder to demand payment on a tender of such bonds according to the terms of the bonds do not constitute matured principal and interest payments.
- (j) Guarantee restrictions. The guarantee provided for eligible bonds under the provisions of TEC, Chapter 45, Subchapter C, is restricted to matured bond principal and interest. The guarantee applies to all matured interest on eligible bonds, whether the bonds were issued with a fixed or variable interest rate and whether the interest rate changes as a result of an interest reset provision or other bond resolution provision requiring an interest rate change. The guarantee does not extend to any obligation of a charter district under any agreement with a third party relating to bonds that is defined or described in state law as a "bond enhancement agreement" or a "credit agreement," unless the right to payment of such third party is directly as a result of such third party being a bondholder.
- (k) Notice of default. A charter district that has determined that it is or will be unable to pay maturing or matured principal or interest on a guaranteed bond must immediately, but not later than the fifth business day before the maturing or matured principal or interest becomes due, notify the commissioner.
- (l) Charter District Bond Guarantee Reserve Fund. The Charter District Bond Guarantee Reserve Fund is a special fund in the state treasury outside the general revenue fund and is managed by the SBOE in the same manner that the PSF is managed by the SBOE.
- (m) Payment from Charter District Bond Guarantee Reserve Fund and PSF.
- (1) Immediately after the commissioner receives the notice described in subsection (k) of this section, the commissioner will notify the TEA division responsible for administering the PSF of the notice of default and instruct the comptroller to transfer from the Charter District Bond Guarantee Reserve Fund established under TEC, §45.0571, to the charter district's paying agent the amount necessary to pay the maturing or matured principal or interest.
- (2) If money in the reserve fund is insufficient to pay the amount due on a bond under paragraph (1) of this subsection, the commissioner will instruct the comptroller to transfer from the appropriate account in the PSF to the charter district's paying agent the amount necessary to pay the balance of the unpaid maturing or matured principal or interest.

- (3) Immediately after receipt of the funds for payment of the principal or interest, the paying agent must pay the amount due and forward the canceled bond or coupon to the comptroller. The comptroller will hold the canceled bond or coupon on behalf of the fund or funds from which payment was made.
- (4) To ensure that the charter district reimburses the reserve fund and the PSF, if applicable, the commissioner will withhold from state funds otherwise payable to the charter district the amount that the charter district owes in reimbursement.
- (5) Funds intercepted for reimbursement under paragraph (4) of this subsection will be used to fully reimburse the PSF before any funds reimburse the reserve fund. If the funds intercepted under paragraph (4) of this subsection are insufficient to fully reimburse the PSF with interest, subsequent payments into the reserve fund will first be applied to any outstanding obligation to the PSF.
- (6) Following full reimbursement to the reserve fund and the PSF, if applicable, with interest, the comptroller will further cancel the bond or coupon and forward it to the charter district for which payment was made. Interest will be charged at the rate determined under the Texas Government Code (TGC), §2251.025(b). Interest will accrue as specified in the TGC, §2251.025(a) and (c). For purposes of this section, the "date the payment becomes overdue" that is referred to in the TGC, §2251.025(a), is the date that the comptroller makes the payment to the charter district's paying agent.
- (n) Bonds not accelerated on default. If a charter district fails to pay principal or interest on a guaranteed bond when it matures, other amounts not yet mature are not accelerated and do not become due by virtue of the charter district's default.
- (o) Reimbursement of Charter District Bond Guarantee Reserve Fund or PSF. If payment from the Charter District Bond Guarantee Reserve Fund or the PSF is made on behalf of a charter district, the charter district must reimburse the amount of the payment, plus interest, in accordance with the requirements of TEC, §45.061.
- (p) Repeated failure to pay. If a total of two or more payments are made under the BGP on the bonds of a charter district, the commissioner may take action in accordance with the provisions of TEC, §45.062.
- (q) Report on the use of funds and confirmation of use of funds by independent auditor. A charter district that issues bonds approved for the guarantee must report to TEA annually in a form prescribed by the commissioner on the use of the bond funds until all bond proceeds have been spent. The charter district's independent auditor must confirm in the charter district's annual financial report that bond funds have been used in accordance with the purpose specified in the application for the guarantee.
- (r) Failure to comply with statute or this section. An open-enrollment charter holder's failure to comply with the requirements of TEC, Chapter 45, Subchapter C, or with the requirements of this section, including by making any material misrepresentations in the charter holder's application for charter district designation and the guarantee, constitutes a material violation of the open-enrollment charter holder's charter.

**§33.8. Compliance with Securities and Exchange Commission (SEC) Rule 15c2-12 Pertaining to Disclosure of Information Relating to the Bond Guarantee Program.**

- (a) Definitions. As used in this section, the following terms have the meanings ascribed to such terms below.
  - (1) Agency means the Texas Education Agency and any successors or assigns thereto with respect to the management and administration of the Program or the investment of the Permanent School Fund.
  - (2) Financial Obligation means, with respect to the Program, a:
    - (A) debt obligation;
    - (B) derivative instrument entered into in connection with, or pledged as security or a source of a payment for, an existing or planned debt obligation; or

- (C) guarantee of a debt obligation or any such derivative instrument; provided that "financial obligation" shall not include municipal securities as to which a final official statement (as defined in the Rule) has been provided to the MSRB consistent with the Rule.
- (3) Guaranteed Bonds means obligations for which application is made and granted for a guarantee under the Program.
- (4) Issuing District means a school district or charter district which issues Guaranteed Bonds.
- (5) MSRB means the Municipal Securities Rulemaking Board or any successor to its functions under the Rule.
- (6) Official Statement means each offering document of an Issuing District used in the offering and/or sale of Guaranteed Bonds.
- (7) Order means the resolution, order, ordinance or other instrument or instruments of an Issuing District pursuant to which Guaranteed Bonds are issued and the rights of the holders and beneficial owners thereof are established.
- (8) Permanent School Fund means the perpetual school fund established by Article VII, Section 2 of the Texas Constitution.
- (9) Program means the program of bond guarantee by the Permanent School Fund, which program has been established by Article VII, Sections 2 and 5 of the Texas Constitution, and is administered in accordance with Subchapter C, Chapter 45, Texas Education Code, as amended, and the rules and regulations of the Agency. The term Program shall also include the rules, regulations and policies of the Agency with respect to the administration of such program of guarantee of school district bonds, as well as the rules, regulations, policies of the Agency with respect to the administration, and the operational and financial results, of the Permanent School Fund.
- (10) Program Regulation means this rule of the Agency which is promulgated for the purpose of establishing and undertaking with respect to the Program which satisfies the requirements of the Rule.
- (11) PSF Corporation means the Permanent School Fund Corporation created by the State Board of Education pursuant to, and having the powers set forth in, Subchapter B of Chapter 43, Texas Education Code, as amended.
- (12) Rule means SEC Rule 15c2-12, as amended from time to time.
- (13) SEC means the United States Securities and Exchange Commission.
- (b) Annual Reports.
- (1) The Agency shall provide annually to the MSRB, within six months after the end of each fiscal year, financial information and operating data with respect to Program of the general type which describes the Program and which is included in an Official Statement for Guaranteed Bonds, which is prepared by the PSF Corporation. Any financial statements to be provided need not be audited. Such information shall be transmitted electronically to the MSRB, in such format and accompanied by such identifying information as prescribed by the MSRB.
- (2) If the Agency changes its fiscal year from the year ending August 31, it will file notice with the MSRB of the change (and of the date of the new fiscal year end) prior to the next date by which the Agency otherwise would be required to provide financial information and data pursuant to this section.
- (3) The financial information and operating data to be provided pursuant to this section may be set forth in full in one or more documents or may be included by specific reference to any document (including an official statement or other offering document, if it is available from the MSRB) that theretofore has been provided to either the MSRB or filed with the SEC.
- (c) Event Notices.

- (1) The Agency shall notify the MSRB, in a timely manner (but not in excess of ten business days after the occurrence of the event), of any of the following events with respect to the Program:
- (A) Principal and interest payment delinquencies;
  - (B) Non-payment related defaults if such event is material within the meaning of the federal securities laws;
  - (C) Unscheduled draws on debt service reserves reflecting financial difficulties;
  - (D) Unscheduled draws on credit enhancements reflecting financial difficulties;
  - (E) Substitution of credit or liquidity providers, or their failure to perform;
  - (F) Adverse tax opinions, the issuance by the Internal Revenue Service of proposed or final determinations of taxability, Notices of Proposed Issue (IRS Form 5701-TEB), or other material notices or determinations with respect to the tax status of the Program, or other material events affecting the tax status of the Program;
  - (G) Modifications to rights of holders of the Bonds, if such event is material within the meaning of the federal securities laws;
  - (H) Bond calls, if such event is material within the meaning of the federal securities laws, and tender offers;
  - (I) Defeasances;
  - (J) Release, substitution, or sale of property securing repayment of Guaranteed Bonds, if such event is material within the meaning of the federal securities laws;
  - (K) Rating changes of the Program;
  - (L) Bankruptcy, insolvency, receivership, or similar event of the Program, which shall occur as described below;
  - (M) The consummation of a merger, consolidation, or acquisition involving the Program or the sale of all or substantially all of its assets, other than in the ordinary course of business, the entry into a definitive agreement to undertake such an action or the termination of a definitive agreement relating to any such actions, other than pursuant to its terms, if such event is material within the meaning of the federal securities laws;
  - (N) Appointment of a successor or additional trustee with respect to the Program or the change of name of a trustee, if such event is material within the meaning of the federal securities laws;
  - (O) The incurrence of a financial obligation of the Program, if material, or agreement to covenants, events of default, remedies, priority rights, or other similar terms of a financial obligation of the Program, any of which affect security holders, if material; and
  - (P) Default, event of acceleration, termination event, modification of terms, or other similar events under the terms of a financial obligation of the Program, any of which reflect financial difficulties.
- (2) For these purposes, any event described in the immediately preceding paragraph (L) is considered to occur when any of the following occur: the appointment of a receiver, fiscal agent, or similar officer for the Program in a proceeding under the United States Bankruptcy Code or in any other proceeding under state or federal law in which a court or governmental authority has assumed jurisdiction over substantially all of the assets or business of the Program, or if such jurisdiction has been assumed by leaving the existing governing body and officials or officers in possession but subject to the supervision and orders of a court or governmental authority, or the entry of an order confirming a plan of reorganization, arrangement, or liquidation by a court or governmental authority having supervision or jurisdiction over substantially all of the assets or business of the Program.

- (3) The Agency shall notify the MSRB, in a timely manner, of any failure by the Agency to provide financial information or operating data in accordance with Section 1 of this Program Regulation by the time required by such Section.
- (4) Nothing in this Program Regulation shall obligate the Agency to make any filings or disclosures with respect to Guaranteed Bonds, as the obligations of the Agency hereunder pertain solely to the Program.
- (d) Limitations, Disclaimers, and Amendments.
- (1) With respect to a series of Guaranteed Bonds, the Agency shall be obligated to observe and perform the covenants specified in this Program Regulation for so long as, but only for so long as, the Agency remains an "obligated person" with respect to the Guaranteed Bonds within the meaning of the Rule.
- (2) The provisions of this Program Regulation are for the sole benefit of each Issuing District, as well as holders and beneficial owners of the Guaranteed Bonds; nothing in this Program Regulation, express or implied, shall give any benefit or any legal or equitable right, remedy, or claim hereunder to any other person. The Agency undertakes to provide only the financial information, operating data, financial statements, and notices which it has expressly agreed to provide pursuant to this Program Regulation and does not hereby undertake to provide any other information, even if such information may be relevant or material to a complete presentation of the Program's financial results, condition, or prospects. The Agency does not undertake to update any information provided in accordance with this Program Regulation or otherwise, except as expressly provided herein. The Agency does not make any representation or warranty concerning such information or its usefulness to a decision to invest in or sell Guaranteed Bonds at any time.
- (3) Under no circumstances shall the Agency or the Program be liable to the holder or beneficial owner of any Guaranteed Bond, the Issuing District or any other person or entity, in contract or tort, for damages resulting in whole or in part from any breach by the Agency, whether negligent or without fault on its part, of any covenant specified in this Program Regulation, but every right and remedy of any such person, in contract or tort, for or on account of any such breach shall be limited to an action for mandamus or specific performance.
- (4) No default by the Agency in observing or performing its obligations under this Program Regulation shall comprise a breach of or default under the Order for purposes of any other provision of the Order. Nothing in this Program Regulation is intended or shall act to disclaim, waive, or otherwise limit the duties of the Agency under federal and state securities laws.
- (5) The provisions of this Program Regulation may be amended by the Agency from time to time to adapt to changed circumstances that arise from a change in legal requirements, a change in law, or a change in the identity, nature, status, or type of operations of the Agency, but only if:
- (A) the provisions of this Program Regulation, as so amended, would have permitted an underwriter to purchase or sell Guaranteed Bonds in the primary offering of the Guaranteed Bonds in compliance with the Rule, taking into account any amendments or interpretations of the Rule since such offering as well as such changed circumstances; and
- (B) either:
- (i) the holders of a majority in aggregate principal amount of the outstanding Guaranteed Bonds consent to such amendment, or
- (ii) a person that is unaffiliated with the Agency (such as nationally recognized bond counsel) determines that such amendment will not materially impair the interest of the holders and beneficial owners of the Guaranteed Bonds.
- (6) If the Agency so amends the provisions of this Program Regulation, it shall include with any amended financial information or operating data next provided in accordance with subsection (b) of this section (relating to Compliance with SEC Rule 15c2-12 Pertaining to Disclosure of Information Relating to the Bond Guarantee Program) an explanation, in narrative form, of the



reason for the amendment and of the impact of any change in the type of financial information or operating data so provided. The Agency may also amend or repeal the provisions of this continuing disclosure agreement if the SEC amends or repeals the applicable provisions of the Rule or a court of final jurisdiction enters judgment that such provisions of the Rule are invalid, but only if and to the extent that the provisions of this sentence would not prevent an underwriter from lawfully purchasing or selling Guaranteed Bonds in the primary offering of the Guaranteed Bonds.

## **Subchapter B. Texas Permanent School Fund Corporation Rules**

### **§33.21. Texas Permanent School Fund Corporation.**

Terms of directors. Any State Board of Education (SBOE) member who is appointed to the Texas Permanent School Fund (PSF) Corporation board of directors pursuant to SBOE policy under Texas Education Code, §43.053(a)(1), shall cease to be a Texas PSF Corporation director upon the expiration of his or her term of service on or upon other separation from the SBOE Committee on School Finance/Permanent School Fund in accordance with the SBOE's rules and policies.

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ATTACHMENT  
Proposed Revisions to 19 TAC

**Chapter 113. Texas Essential Knowledge and Skills for Social Studies**

**Subchapter A. Elementary**

**~~§113.10. Implementation of Texas Essential Knowledge and Skills for Social Studies, Elementary, Adopted 2018.~~**

~~[The provisions of §§113.11-113.16 of this subchapter shall be implemented by school districts beginning with the 2020-2021 school year.]~~

**§113.11. Social Studies, Kindergarten, Adopted 2022 ~~[2018]~~ .**

(a) Implementation. The provisions of this section shall be implemented by school districts beginning with the 2024-2025 ~~[2025-2026]~~ school year.

~~[(1) No later than July 31, 2024, the commissioner of education shall determine whether instructional materials funding has been made available to Texas public schools for materials that cover the essential knowledge and skills identified in this section.]~~

~~[(2) If the commissioner makes the determination that instructional materials funding has been made available, this section shall be implemented beginning with the 2025-2026 school year and apply to the 2025-2026 and subsequent school years.]~~

~~[(3) If the commissioner does not make the determination that instructional materials funding has been made available under this subsection, the commissioner shall determine no later than August 31 of each subsequent school year whether instructional materials funding has been made available. If the commissioner determines that instructional materials funding has been made available, the commissioner shall notify the State Board of Education and school districts that this section shall be implemented for the following school year.]~~

(b) ~~[(a)]~~ Introduction.

- (1) In Kindergarten, the study of the self, home, family, and classroom establishes the foundation for responsible citizenship in society. Students explore state and national heritage by examining the celebration of patriotic holidays and the contributions of individuals. The concept of chronology is introduced. Students apply geographic concepts of location and physical and human characteristics of place. Students identify basic human needs and ways people meet these needs. Students learn the purpose of rules and the role of authority figures in the home and school. Students learn customs, symbols, and celebrations that represent American beliefs and principles and contribute to our national identity. Students compare family customs and traditions and describe examples of technology in the home and school. Students acquire information from a variety of oral and visual sources. Students practice problem-solving, decision-making, and independent-thinking skills.
- (2) To support the teaching of the essential knowledge and skills, the use of a variety of rich material is encouraged. Motivating resources are available from museums, historical sites, presidential libraries, and local and state preservation societies.
- (3) The eight strands of the essential knowledge and skills for social studies are intended to be integrated for instructional purposes. Skills listed in the social studies skills strand in subsection ~~(c)~~ ~~[(b)]~~ of this section should be incorporated into the teaching of all essential knowledge and skills for social studies. A greater depth of understanding of complex content material can be attained when integrated social studies content from the various disciplines and critical-thinking skills are taught together. Statements that contain the word "including" reference content that must be mastered, while those containing the phrase "such as" are intended as possible illustrative examples.

- (4) Students identify the role of the U.S. free enterprise system within the parameters of this course and understand that this system may also be referenced as capitalism or the free market system.
- (5) Throughout social studies in Kindergarten-Grade 12, students build a foundation in history; geography; economics; government; citizenship; culture; science, technology, and society; and social studies skills. The content, as appropriate for the grade level or course, enables students to understand the importance of patriotism, function in a free enterprise society, and appreciate the basic democratic values of our state and nation as referenced in the Texas Education Code (TEC), §28.002(h).
- (6) Students understand that a constitutional republic is a representative form of government whose representatives derive their authority from the consent of the governed, serve for an established tenure, and are sworn to uphold the constitution.
- (7) Students must demonstrate learning performance related to any federal and state mandates regarding classroom instruction. Although Kindergarten is not required to participate in Celebrate Freedom Week, according to the TEC, §29.907, primary grades lay the foundation for subsequent learning. As a result, Kindergarten Texas essential knowledge and skills include standards related to this patriotic observance.
- (8) Students discuss how and whether the actions of U.S. citizens and the local, state, and federal governments have achieved the ideals espoused in the founding documents.

(c) ~~(b)~~ Knowledge and skills.

- (1) History. The student understands that holidays are celebrations of special events. The student is expected to:
  - (A) identify national patriotic holidays such as Constitution Day, Presidents' Day, Veterans Day, and Independence Day; and
  - (B) identify customs associated with national patriotic holidays such as parades and fireworks on Independence Day.
- (2) History. The student understands how historical figures helped shape the state and nation. The student is expected to identify contributions of historical figures, including Stephen F. Austin, George Washington, Christopher Columbus, and José Antonio Navarro, who helped to shape the state and nation.
- (3) Geography. The student understands the concept of location. The student is expected to:
  - (A) use spatial terms, including over, under, near, far, left, and right, to describe relative location;
  - (B) locate places on the school campus and describe their relative locations; and
  - (C) identify and use geographic tools that aid in determining location, including maps and globes.
- (4) Geography. The student understands physical and human characteristics of place to better understand self, home, family, classroom, and the world around them. The student is expected to:
  - (A) identify the physical characteristics of place such as landforms, bodies of water, Earth's resources, and weather; and
  - (B) identify how geographic location influences human characteristics of place such as shelter, clothing, food, and activities.
- (5) Economics. The student understands the difference between human needs and wants and how they are met. The student is expected to:
  - (A) identify basic human needs of food, clothing, and shelter;
  - (B) explain the difference between needs and wants; and

- (C) explain how basic human needs and wants can be met.
- (6) Economics. The student understands the value of jobs. The student is expected to:
- (A) identify jobs in the home, school, and community; and
- (B) explain why people have jobs.
- (7) Government. The student understands the purpose of rules. The student is expected to:
- (A) identify purposes for having rules; and
- (B) identify rules that provide order, security, and safety in the home and school.
- (8) Government. The student understands the role of authority figures. The student is expected to:
- (A) identify authority figures in the home, school, and community; and
- (B) explain how authority figures enforce rules.
- (9) Citizenship. The student understands important symbols, customs, and responsibilities that represent American beliefs and principles and contribute to our national identity. The student is expected to:
- (A) identify the United States flag and the Texas state flag;
- (B) recite the Pledge of Allegiance to the United States Flag and the Pledge to the Texas Flag; and
- (C) use voting as a method for group decision making.
- (10) Culture. The student understands similarities and differences among individuals. The student is expected to identify similarities and differences among individuals such as kinship and religion.
- (11) Culture. The student understands the importance of family traditions. The student is expected to:
- (A) describe and explain the importance of family traditions; and
- (B) compare traditions among families.
- (12) Science, technology, and society. The student understands ways technology is used in the home and school and how technology affects people's lives. The student is expected to:
- (A) identify examples of technology used in the home and school;
- (B) describe how technology helps accomplish specific tasks and meet people's needs; and
- (C) describe how his or her life might be different without modern technology.
- (13) Social studies skills. The student applies critical-thinking skills to organize and use information acquired from a variety of valid sources, including technology. The student is expected to:
- (A) identify and state facts based on relevant evidence;
- (B) identify different kinds of historical sources and artifacts and explain how they can be used to study the past;
- (C) [~~A~~] gather information about a topic using a variety of valid oral and visual sources such as interviews, music, pictures, symbols, and artifacts with adult assistance; and
- (D) [~~B~~] sequence and categorize information.
- (14) Social studies skills. The student communicates in oral and visual forms. The student is expected to:
- (A) place events in chronological order;
- (B) use social studies terminology related to time and chronology correctly, including before, after, next, first, last, yesterday, today, and tomorrow;

- (C) communicate information visually, orally, or in writing based on knowledge and experiences in social studies;
  - ~~[(C) — express ideas orally based on knowledge and experiences; and]~~
  - (D) create and interpret visuals, including pictures and maps ; and [.]
  - (E) apply and practice classroom rules and procedures for listening and responding respectfully.
- (15) Social studies skills. The student uses problem-solving and decision-making skills, working independently and with others. The student is expected to :
- (A) use democratic procedures to collaborate with others when making decisions on issues in the classroom, school, or community; and
  - (B) use problem-solving and decision-making processes to identify a problem, gather information, list and consider options, consider advantages and disadvantages, choose and implement a solution, and evaluate the effectiveness of the solution.

**§113.12. Social Studies, Grade 1, Adopted 2022 [~~2018~~] .**

(a) Implementation. The provisions of this section shall be implemented by school districts beginning with the 2024-2025 [~~2025-2026~~] school year.

~~[(1) — No later than July 31, 2024, the commissioner of education shall determine whether instructional materials funding has been made available to Texas public schools for materials that cover the essential knowledge and skills identified in this section.]~~

~~[(2) — If the commissioner makes the determination that instructional materials funding has been made available, this section shall be implemented beginning with the 2025-2026 school year and apply to the 2025-2026 and subsequent school years.]~~

~~[(3) — If the commissioner does not make the determination that instructional materials funding has been made available under this subsection, the commissioner shall determine no later than August 31 of each subsequent school year whether instructional materials funding has been made available. If the commissioner determines that instructional materials funding has been made available, the commissioner shall notify the State Board of Education and school districts that this section shall be implemented for the following school year.]~~

(b) ~~[(a)]~~ Introduction.

- (1) In Grade 1, students study their relationship to the classroom, school, and community to establish the foundation for responsible citizenship in society. Students develop concepts of time and chronology by distinguishing among past, present, and future events. Students identify anthems and mottoes of the United States and Texas. Students create simple maps to identify the location of places in the classroom, school, and community. Students explore the concepts of goods and services and the value of work. Students identify individuals who exhibit good citizenship. Students describe the importance of family customs and traditions and identify how technology has changed family life. Students sequence and categorize information. Students practice problem-solving, decision-making, and independent-thinking skills.
- (2) To support the teaching of the essential knowledge and skills, the use of a variety of rich material is encouraged. Motivating resources are available from museums, historical sites, presidential libraries, and local and state preservation societies.
- (3) The eight strands of the essential knowledge and skills for social studies are intended to be integrated for instructional purposes. Skills listed in the social studies skills strand in subsection (c) ~~[(b)]~~ of this section should be incorporated into the teaching of all essential knowledge and skills for social studies. A greater depth of understanding of complex content material can be attained when integrated social studies content from the various disciplines and critical-thinking skills are taught together. Statements that contain the word "including" reference content that must

be mastered, while those containing the phrase "such as" are intended as possible illustrative examples.

- (4) Students identify the role of the U.S. free enterprise system within the parameters of this course and understand that this system may also be referenced as capitalism or the free market system.
- (5) Throughout social studies in Kindergarten-Grade 12, students build a foundation in history; geography; economics; government; citizenship; culture; science, technology, and society; and social studies skills. The content, as appropriate for the grade level or course, enables students to understand the importance of patriotism, function in a free enterprise society, and appreciate the basic democratic values of our state and nation as referenced in the Texas Education Code (TEC), §28.002(h).
- (6) Students understand that a constitutional republic is a representative form of government whose representatives derive their authority from the consent of the governed, serve for an established tenure, and are sworn to uphold the constitution.
- (7) Students must demonstrate learning performance related to any federal and state mandates regarding classroom instruction. Although Grade 1 is not required to participate in Celebrate Freedom Week, according to the TEC, §29.907, primary grades lay the foundation for subsequent learning. As a result, Grade 1 Texas essential knowledge and skills include standards related to this patriotic observance.
- (8) Students discuss how and whether the actions of U.S. citizens and the local, state, and federal governments have achieved the ideals espoused in the founding documents.

(c) ~~(b)~~ Knowledge and skills.

- (1) History. The student understands the origins of customs, holidays, and celebrations. The student is expected to:
  - (A) describe the origins of customs, holidays, and celebrations of the community, state, and nation such as Constitution Day, Independence Day, and Veterans Day; and
  - (B) compare the observance of holidays and celebrations.
- (2) History. The student understands how historical figures helped shape the state and nation. The student is expected to:
  - (A) identify contributions of historical figures, including Sam Houston, George Washington, Abraham Lincoln, and Martin Luther King Jr., who have influenced the state and nation; and
  - (B) compare the lives of historical figures who have influenced the state and nation.
- (3) Geography. The student understands the relative location of places. The student is expected to:
  - (A) describe the location of self and objects relative to other locations in the classroom and school using spatial terms; and
  - (B) locate places using the four cardinal directions.
- (4) Geography. The student understands the purpose of geographic tools, including maps and globes. The student is expected to:
  - (A) create and use simple maps such as maps of the home, classroom, school, and community; and
  - (B) locate and explore the community, Texas, and the United States on maps and globes.
- (5) Geography. The student understands physical and human characteristics of place to better understand their community and the world around them. The student is expected to:
  - (A) identify and describe the physical characteristics of place such as landforms, bodies of water, Earth's resources, and weather; and

- (B) identify and describe how geographic location influences the human characteristics of place such as shelter, clothing, food, and activities.
- (6) Economics. The student understands how families meet basic human needs. The student is expected to:
- (A) describe ways that families meet basic human needs; and
  - (B) describe similarities and differences in ways families meet basic human needs.
- (7) Economics. The student understands the concepts of goods and services. The student is expected to:
- (A) identify examples of goods and services in the home, school, and community;
  - (B) identify ways people exchange goods and services; and
  - (C) identify the role of markets in the exchange of goods and services.
- (8) Economics. The student understands the condition of not being able to have all the goods and services one wants. The student is expected to:
- (A) identify examples of people wanting more than they can have;
  - (B) explain why wanting more than they can have requires that people make choices; and
  - (C) identify examples of choices families make when buying goods and services.
- (9) Economics. The student understands the value of work. The student is expected to:
- (A) describe the tools of various jobs and the characteristics of a job well performed; and
  - (B) describe how various jobs contribute to the production of goods and services.
- (10) Government. The student understands the purpose of rules and laws. The student is expected to:
- (A) explain the purpose for rules and laws in the home, school, and community; and
  - (B) identify rules and laws that establish order, provide security, and manage conflict.
- (11) Government. The student understands the role of authority figures and public officials. The student is expected to:
- (A) identify the responsibilities of authority figures in the home, school, and community; and
  - (B) identify and describe the roles of public officials in the community, state, and nation.
- (12) Citizenship. The student understands characteristics of good citizenship as exemplified by historical figures and other individuals. The student is expected to:
- (A) identify characteristics of good citizenship, including truthfulness, justice, equality, respect for oneself and others, responsibility in daily life, and participation in government by educating oneself about the issues, respectfully holding public officials to their word, and voting; and
  - (B) identify historical figures and other individuals who have exemplified good citizenship such as Benjamin Franklin and Eleanor Roosevelt.
- (13) Citizenship. The student understands important symbols, customs, and celebrations that represent American beliefs and principles that contribute to our national identity. The student is expected to:
- (A) explain state and national patriotic symbols, including the United States and Texas flags, the Liberty Bell, the Statue of Liberty, and the Alamo;
  - (B) recite the Pledge of Allegiance to the United States Flag and the Pledge to the Texas Flag;
  - (C) identify anthems and mottoes of Texas and the United States;



- (D) explain and practice voting as a way of making choices and decisions; and
  - (E) explain how patriotic customs and celebrations reflect American individualism and freedom.
- (14) Culture. The student understands the importance of family and community beliefs, language, and traditions. The student is expected to:
- (A) describe and explain the importance of beliefs, language, and traditions of families and communities; and
  - (B) explain the way folktales and legends reflect beliefs, language, and traditions of communities.
- (15) Science, technology, and society. The student identifies individuals who created or invented new technology and understands how technology affects daily life, past and present. The student is expected to:
- (A) describe how technology has affected the ways families live;
  - (B) describe how technology has affected communication, transportation, and recreation; and
  - (C) identify the contributions of scientists and inventors such as Alexander Graham Bell, Thomas Edison, and Garrett Morgan.
- (16) Social studies skills. The student applies critical-thinking skills to organize and use information acquired from a variety of valid sources, including technology. The student is expected to:
- (A) identify and state facts based on relevant evidence;
  - (B) identify different kinds of historical sources and artifacts and explain how they can be used to study the past;
  - (C) ~~[(A)]~~ gather information about a topic using a variety of valid oral and visual sources such as interviews, music, pictures, symbols, and artifacts with adult assistance; and
  - (D) ~~[(B)]~~ sequence and categorize information.
- (17) Social studies skills. The student communicates in oral, visual, and written forms. The student is expected to:
- (A) use a simple timeline to distinguish among past, present, and future;
  - (B) use a calendar to describe and measure time in days, weeks, months, and years;
  - (C) communicate information visually, orally, or in writing based on knowledge and experiences in social studies;
  - ~~[(C)] express ideas orally based on knowledge and experiences;~~
  - (D) create and interpret visual and written material; ~~[and]~~
  - (E) use social studies terminology correctly ; and [;]
  - (F) apply and practice classroom rules and procedures for listening and responding respectfully.
- (18) Social studies skills. The student uses problem-solving and decision-making skills, working independently and with others. The student is expected to :
- (A) use democratic procedures to collaborate with others when making decisions on issues in the classroom, school, or community; and
  - (B) use problem-solving and decision-making processes to identify a problem, gather information, list and consider options, consider advantages and disadvantages, choose and implement a solution, and evaluate the effectiveness of the solution.

**§113.13. Social Studies, Grade 2, Adopted 2022 [~~2018~~].**

(a) ~~Implementation. The provisions of this section shall be implemented by school districts beginning with the 2024-2025 [~~2025-2026~~] school year.~~

~~[(1) No later than July 31, 2024, the commissioner of education shall determine whether instructional materials funding has been made available to Texas public schools for materials that cover the essential knowledge and skills identified in this section.]~~

~~[(2) If the commissioner makes the determination that instructional materials funding has been made available, this section shall be implemented beginning with the 2025-2026 school year and apply to the 2025-2026 and subsequent school years.]~~

~~[(3) If the commissioner does not make the determination that instructional materials funding has been made available under this subsection, the commissioner shall determine no later than August 31 of each subsequent school year whether instructional materials funding has been made available. If the commissioner determines that instructional materials funding has been made available, the commissioner shall notify the State Board of Education and school districts that this section shall be implemented for the following school year.]~~

(b) ~~(a)~~ Introduction.

- (1) In Grade 2, students focus on a study of their local community by examining the impact of significant individuals and events on the history of the community as well as on the state and nation. Students begin to develop the concepts of time and chronology. The relationship between the physical environment and human activities is introduced as are the concepts of consumers and producers. Students identify functions of government as well as services provided by the local government. Students continue to acquire knowledge of customs, symbols, and celebrations that represent American beliefs and principles. Students identify the significance of works of art in the local community and explain how technological innovations have changed transportation and communication. Students communicate what they have learned in written, oral, and visual forms.
- (2) To support the teaching of the essential knowledge and skills, the use of a variety of rich material such as nonfiction texts, primary sources, biographies, folklore, poetry, songs, and artworks is encouraged. Motivating resources are available from museums, historical sites, presidential libraries, online tours, and local and state preservation societies.
- (3) The eight strands of the essential knowledge and skills for social studies are intended to be integrated for instructional purposes. Skills listed in the social studies skills strand in subsection (c) ~~(b)~~ of this section should be incorporated into the teaching of all essential knowledge and skills for social studies. A greater depth of understanding of complex content material can be attained when integrated social studies content from the various disciplines and critical-thinking skills are taught together. Statements that contain the word "including" reference content that must be mastered, while those containing the phrase "such as" are intended as possible illustrative examples.
- (4) Students identify the role of the U.S. free enterprise system within the parameters of this course and understand that this system may also be referenced as capitalism or the free market system.
- (5) Throughout social studies in Kindergarten-Grade 12, students build a foundation in history; geography; economics; government; citizenship; culture; science, technology, and society; and social studies skills. The content, as appropriate for the grade level or course, enables students to understand the importance of patriotism, function in a free enterprise society, and appreciate the basic democratic values of our state and nation as referenced in the Texas Education Code (TEC), §28.002(h).
- (6) Students understand that a constitutional republic is a representative form of government whose representatives derive their authority from the consent of the governed, serve for an established tenure, and are sworn to uphold the constitution.
- (7) Students must demonstrate learning performance related to any federal and state mandates regarding classroom instruction. Although Grade 2 is not required to participate in Celebrate

Freedom Week, according to the TEC, §29.907, primary grades lay the foundation for subsequent learning. As a result, Grade 2 Texas essential knowledge and skills include standards related to this patriotic observance.

- (8) Students discuss how and whether the actions of U.S. citizens and the local, state, and federal governments have achieved the ideals espoused in the founding documents.

(c) ~~(b)~~ Knowledge and skills.

- (1) History. The student understands the historical significance of landmarks and celebrations in the community, state, and nation. The student is expected to:
  - (A) explain the significance of various community, state, and national celebrations such as Veterans Day, Memorial Day, Independence Day, and Thanksgiving; and
  - (B) identify and explain the significance of various community, state, and national landmarks such as monuments and government buildings.
- (2) History. The student understands how historical figures helped shape the community, state, and nation. The student is expected to:
  - (A) identify contributions of historical figures, including Thurgood Marshall, Irma Rangel, and Theodore Roosevelt, who have influenced the state and nation; and
  - (B) describe how people and events have influenced local community history.
- (3) Geography. The student uses simple geographic tools, including maps and globes. The student is expected to:
  - (A) identify and use information on maps and globes using basic map elements such as title, cardinal directions, and legend; and
  - (B) create maps to show places and routes within the home, school, and community.
- (4) Geography. The student understands the location of places in their community, state, country, and the world. The student is expected to:
  - (A) identify major landforms and bodies of water, including each of the seven continents and each of the oceans, on maps and globes; and
  - (B) locate places, including the local community, Texas, the United States, the state capital, the U.S. capital, and the bordering countries of Canada and Mexico on maps and globes.
- (5) Geography. The student understands how humans use and modify the physical environment. The student is expected to:
  - (A) identify ways in which people have modified the physical environment such as clearing land, building roads, using land for agriculture, and drilling for oil;
  - (B) identify consequences of human modification of the physical environment; and
  - (C) identify ways people can conserve and replenish Earth's resources.
- (6) Economics. The student understands the value of work. The student is expected to:
  - (A) explain how work provides income to purchase goods and services; and
  - (B) explain the choices people can make about earning, spending, and saving money.
- (7) Economics. The student understands the roles of producers and consumers in the production of goods and services. The student is expected to:
  - (A) distinguish between producing and consuming;
  - (B) identify ways in which people are both producers and consumers; and
  - (C) trace the development of a product from a natural resource to a finished product.

- (8) Government. The student understands the purpose of governments. The student is expected to:
- (A) identify functions of governments such as establishing order, providing security, and managing conflict; and
  - (B) identify governmental services in the community such as police and fire protection, libraries, schools, and parks and explain their value to the community.
- (9) Government. The student understands the role of public officials. The student is expected to:
- (A) name current public officials, including mayor, governor, and president;
  - (B) compare the roles of public officials, including mayor, governor, and president;
  - (C) identify ways that public officials are selected, including election and appointment to office; and
  - (D) identify how citizens participate in their own governance through staying informed of what public officials are doing, providing input to them, and volunteering to participate in government functions.
- (10) Citizenship. The student understands characteristics of good citizenship as exemplified by historical figures and other individuals. The student is expected to:
- (A) identify characteristics of good citizenship, including truthfulness, justice, equality, respect for oneself and others, responsibility in daily life, and participation in government by educating oneself about the issues, respectfully holding public officials to their word, and voting;
  - (B) identify historical figures and other individuals who have exemplified good citizenship such as Paul Revere, Abigail Adams, World War II Women Airforce Service Pilots (WASPs), Navajo Code Talkers, and Sojourner Truth; and
  - (C) identify ways to actively practice good citizenship, including involvement in community service.
- (11) Citizenship. The student understands important symbols, customs, and celebrations that represent American beliefs and principles that contribute to our national identity. The student is expected to:
- (A) recite the Pledge of Allegiance to the United States Flag and the Pledge to the Texas Flag;
  - (B) sing, recite, or identify selected patriotic songs, including "The Star-Spangled Banner" and "America the Beautiful";
  - ~~(C) use voting as a method for group decision making;~~
  - ~~(D) [~~(C)~~] identify symbols such as state and national birds and flowers and Uncle Sam; and~~
  - ~~(E) [~~(D)~~] identify how selected symbols, customs, and celebrations reflect an American love of individualism, inventiveness, and freedom.~~
- (12) Culture. The student understands ethnic and/or cultural celebrations. The student is expected to:
- (A) identify the significance of various ethnic and/or cultural celebrations; and
  - (B) compare ethnic and/or cultural celebrations.
- (13) Science, technology, and society. The student understands how science and technology have affected life, past and present. The student is expected to:
- (A) describe how science and technology have affected communication, transportation, and recreation; and
  - (B) explain how science and technology have affected the ways in which people meet basic needs.

- (14) Science, technology, and society. The student identifies individuals who exhibited individualism and inventiveness. The student is expected to identify individuals who have exhibited individualism and inventiveness such as Amelia Earhart and George Washington Carver.
- (15) Social studies skills. The student applies critical-thinking skills to organize and use information acquired from a variety of valid sources, including technology. The student is expected to:
- (A) identify and state facts based on relevant evidence;
  - (B) identify different kinds of historical sources and artifacts and explain how they can be used to study the past;
  - (C) ~~[(A)]~~ gather information about a topic using a variety of valid oral and visual sources such as interviews, music, pictures, maps, and artifacts; and
  - (D) ~~[(B)]~~ interpret oral, visual, and print material by sequencing, categorizing, identifying the main idea, predicting, comparing, and contrasting.
- (16) Social studies skills. The student communicates in written, oral, and visual forms. The student is expected to:
- (A) describe the order of events by using designations of time periods such as historical and present times;
  - (B) apply vocabulary related to chronology, including past, present, and future;
  - (C) create and interpret timelines for events in the past and present;
  - (D) use social studies terminology correctly;
  - (E) communicate information visually, orally, or in writing based on knowledge and experiences in social studies;
  - ~~[(E) — express ideas orally based on knowledge and experiences; and]~~
  - (F) create written and visual material such as stories, maps, and graphic organizers to express ideas ; and [ ]
  - (G) apply and practice classroom rules and procedures for listening and responding respectfully.
- (17) Social studies skills. The student uses problem-solving and decision-making skills, working independently and with others. The student is expected to :
- (A) use democratic procedures to collaborate with others when making decisions on issues in the classroom, school, or community; and
  - (B) use problem-solving and decision-making processes to identify a problem, gather information, list and consider options, consider advantages and disadvantages, choose and implement a solution, and evaluate the effectiveness of the solution.

**§113.14. Social Studies, Grade 3, Adopted 2022 [2018] .**

- (a) Implementation. The provisions of this section shall be implemented by school districts beginning with the 2024-2025 [2025-2026] school year.
- ~~[(1) — No later than July 31, 2024, the commissioner of education shall determine whether instructional materials funding has been made available to Texas public schools for materials that cover the essential knowledge and skills identified in this section.]~~
  - ~~[(2) — If the commissioner makes the determination that instructional materials funding has been made available, this section shall be implemented beginning with the 2025-2026 school year and apply to the 2025-2026 and subsequent school years.]~~
  - ~~[(3) — If the commissioner does not make the determination that instructional materials funding has been made available under this subsection, the commissioner shall determine no later than August 31 of~~

each subsequent school year whether instructional materials funding has been made available. If the commissioner determines that instructional materials funding has been made available, the commissioner shall notify the State Board of Education and school districts that this section shall be implemented for the following school year.

(b) ~~(a)~~ Introduction.

- (1) In Grade 3, students learn how diverse individuals have changed their communities and world. Students study the effects inspiring heroes have had on communities, past and present. Students learn about the lives of heroic men and women who made important choices, overcame obstacles, sacrificed for the betterment of others, and embarked on journeys that resulted in new ideas, new inventions, new technologies, and new communities. Students expand their knowledge through the identification and study of people who made a difference, influenced public policy and decision making, and participated in resolving issues that are important to all people. Throughout Grade 3, students develop an understanding of the economic, cultural, and scientific contributions made by individuals.
- (2) To support the teaching of the essential knowledge and skills, the use of a variety of rich material such as biographies, founding documents, poetry, songs, and artworks is encouraged. Motivating resources are available from museums, historical sites, presidential libraries, and local and state preservation societies.
- (3) The eight strands of the essential knowledge and skills for social studies are intended to be integrated for instructional purposes. Skills listed in the social studies skills strand in subsection (c) ~~(b)~~ of this section should be incorporated into the teaching of all essential knowledge and skills for social studies. A greater depth of understanding of complex content material can be attained when integrated social studies content from the various disciplines and critical-thinking skills are taught together. Statements that contain the word "including" reference content that must be mastered, while those containing the phrase "such as" are intended as possible illustrative examples.
- (4) Students identify the role of the U.S. free enterprise system within the parameters of this course and understand that this system may also be referenced as capitalism or the free market system.
- (5) Throughout social studies in Kindergarten-Grade 12, students build a foundation in history; geography; economics; government; citizenship; culture; science, technology, and society; and social studies skills. The content, as appropriate for the grade level or course, enables students to understand the importance of patriotism, function in a free enterprise society, and appreciate the basic democratic values of our state and nation as referenced in the Texas Education Code (TEC), §28.002(h).
- (6) Students understand that a constitutional republic is a representative form of government whose representatives derive their authority from the consent of the governed, serve for an established tenure, and are sworn to uphold the constitution.
- (7) State and federal laws mandate a variety of celebrations and observances, including Celebrate Freedom Week.
  - (A) Each social studies class shall include, during Celebrate Freedom Week as provided under the TEC, §29.907, or during another full school week as determined by the board of trustees of a school district, appropriate instruction concerning the intent, meaning, and importance of the Declaration of Independence and the U.S. Constitution, including the Bill of Rights, in their historical contexts. The study of the Declaration of Independence must include the study of the relationship of the ideas expressed in that document to subsequent American history, including the relationship of its ideas to the rich diversity of our people as a nation of immigrants, the American Revolution, the formulation of the U.S. Constitution, and the abolitionist movement, which led to the Emancipation Proclamation and the women's suffrage movement.
  - (B) Each school district shall require that, during Celebrate Freedom Week or other week of instruction prescribed under subparagraph (A) of this paragraph, students in Grades 3-12

study and recite the following text from the Declaration of Independence: "We hold these Truths to be self-evident, that all Men are created equal, that they are endowed by their Creator with certain unalienable Rights, that among these are Life, Liberty and the Pursuit of Happiness--That to secure these Rights, Governments are instituted among Men, deriving their just Powers from the Consent of the Governed."

- (8) Students discuss how and whether the actions of U.S. citizens and the local, state, and federal governments have achieved the ideals espoused in the founding documents.

(c) ~~(b)~~ Knowledge and skills.

- (1) History. The student understands how individuals, events, and ideas have influenced the history of various communities. The student is expected to:
- (A) describe how individuals, events, and ideas have changed communities, past and present;
  - (B) identify individuals, including Pierre-Charles L'Enfant, Benjamin Banneker, and Benjamin Franklin, who have helped to shape communities; and
  - (C) describe how individuals, including Daniel Boone and the Founding Fathers have contributed to the expansion of existing communities or to the creation of new communities.
- (2) History. The student understands common characteristics of communities, past and present. The student is expected to:
- (A) identify reasons people have formed communities, including a need for security and laws, religious freedom, and material well-being; and
  - (B) compare ways in which people in the local community and other communities meet their needs for government, education, communication, transportation, and recreation.
- (3) Geography. The student understands how humans adapt to and/or modify the physical environment. The student is expected to:
- (A) describe similarities and differences in the physical environment, including climate, landforms, natural resources, and natural hazards;
  - (B) identify and compare how people in different communities adapt to or modify the physical environment in which they live such as deserts, mountains, wetlands, and plains; and
  - (C) describe the effects of human processes such as building new homes, conservation, and pollution in shaping the landscape.
- (4) Geography. The student understands the concepts of location, distance, and direction on maps and globes. The student is expected to:
- (A) use cardinal and intermediate directions to locate places on maps and globes in relation to the local community;
  - (B) use a scale to determine the distance between places on maps and globes; and
  - (C) identify, create, and interpret maps of places that contain map elements, including a title, compass rose, legend, scale, and grid system.
- (5) Economics. The student understands the purposes of earning, spending, saving, and donating money. The student is expected to:
- (A) identify ways of earning, spending, saving, and donating money; and
  - (B) create a simple budget that allocates money for spending and saving.
- (6) Economics. The student understands the concept of the free enterprise system and how businesses operate in the U.S. free enterprise system. The student is expected to:

- (A) explain how supply and demand affect the price of a good or service;
  - (B) define and identify examples of scarcity;
  - (C) explain how the cost of production and selling price affect profits; and
  - (D) identify individuals, past and present, such as Henry Ford and Sam Walton who have started new businesses.
- (7) Government. The student understands the basic structure and functions of various levels of government. The student is expected to:
- (A) describe the basic structure of government in the local community, state, and nation;
  - (B) identify local, state, and national government officials and explain how they are chosen; and
  - (C) identify services commonly provided by local, state, and national governments.
- (8) Government. The student understands important ideas in historical documents at various levels of government. The student is expected to:
- (A) identify the purposes of the Declaration of Independence and the U.S. Constitution, including the Bill of Rights; and
  - (B) describe the concept of "consent of the governed. "
- (9) Citizenship. The student understands characteristics of good citizenship as exemplified by historical and contemporary figures and organizations. The student is expected to:
- (A) identify characteristics of good citizenship, including truthfulness, justice, equality, respect for oneself and others, responsibility in daily life, and participation in government by educating oneself about the issues, respectfully holding public officials to their word, and voting;
  - (B) identify figures such as Helen Keller, Clara Barton, and Ruby Bridges who exemplify good citizenship;
  - (C) identify and describe individual acts of civic responsibility, including obeying laws, serving and improving the community, serving on a jury, and voting; and
  - (D) identify examples of nonprofit and/or civic organizations such as the Red Cross and explain how they serve the common good ; and [ ]
  - (E) use voting as a method for group decision making.
- (10) Culture. The student understands ethnic and/or cultural celebrations of the local community and other communities. The student is expected to:
- (A) explain the significance of various ethnic and/or cultural celebrations in the local community and other communities; and
  - (B) compare ethnic and/or cultural celebrations in the local community with other communities.
- (11) Culture. The student understands the role of heroes in shaping the culture of communities, the state, and the nation. The student is expected to:
- (A) identify and describe the heroic deeds of state and national heroes and military and first responders such as Hector P. Garcia, James A. Lovell, and the Four Chaplains; and
  - (B) identify and describe the heroic deeds of individuals such as Harriet Tubman, Todd Beamer, and other contemporary heroes.
- (12) Culture. The student understands the importance of writers and artists to the cultural heritage of communities. The student is expected to identify how various writers and artists such as Kadir



Nelson, Tomie dePaola, Carmen Lomas Garza, and Laura Ingalls Wilder and their stories, poems, statues, and paintings contribute to the cultural heritage of communities.

- (13) Science, technology, and society. The student understands how individuals have created or invented new technology and affected life in various communities, past and present. The student is expected to:
- (A) identify individuals who have discovered scientific breakthroughs or created or invented new technology such as Jonas Salk, Cyrus McCormick, Bill Gates, Louis Pasteur, and others; and
  - (B) describe the impact of scientific breakthroughs and new technology in computers, pasteurization, and medical vaccines on various communities.
- (14) Social studies skills. The student applies critical-thinking skills to organize and use information acquired from a variety of valid sources, including technology. The student is expected to:
- (A) gather information, including historical and current events and geographic data, about the community using a variety of resources;
  - (B) differentiate and compare the information about a specific issue or event provided in primary and secondary sources;
  - (C) ~~(B)~~ interpret oral, visual, and print material by sequencing, categorizing, identifying the main idea, distinguishing between fact and opinion, identifying cause and effect, comparing, and contrasting; ~~and~~
  - (D) ~~(C)~~ interpret and create visuals, including graphs, charts, tables, timelines, illustrations, and maps ; ~~;~~
  - (E) identify the central claim in a primary or secondary source; and
  - (F) develop and communicate a claim and supporting evidence visually, orally, or in writing related to a social studies topic.
- (15) Social studies skills. The student communicates in written, oral, and visual forms. The student is expected to:
- (A) use social studies terminology correctly;
  - (B) create and interpret timelines;
  - (C) apply the terms year, decade, and century to describe historical times;
  - (D) express ideas orally based on knowledge and experiences; ~~and~~
  - (E) create written and visual material such as stories, pictures, maps, and graphic organizers to express ideas ; ~~and~~ ~~;~~
  - (F) apply foundational language skills to engage in civil discourse about social studies topics, including those with multiple perspectives.
- (16) Social studies skills. The student uses problem-solving and decision-making skills, working independently and with others. The student is expected to :
- (A) use democratic procedures to simulate making decisions on school, local, or state issues; and
  - (B) use problem-solving and decision-making processes to identify a problem, gather information, list and consider options, consider advantages and disadvantages, choose and implement a solution, and evaluate the effectiveness of the solution.

**§113.15. Social Studies, Grade 4, Adopted 2022 [~~2018~~] .**

- (a) Implementation. The provisions of this section shall be implemented by school districts beginning with the 2024-2025 [~~2025-2026~~] school year.

- ~~[(1) No later than July 31, 2024, the commissioner of education shall determine whether instructional materials funding has been made available to Texas public schools for materials that cover the essential knowledge and skills identified in this section.]~~
- ~~[(2) If the commissioner makes the determination that instructional materials funding has been made available, this section shall be implemented beginning with the 2025-2026 school year and apply to the 2025-2026 and subsequent school years.]~~
- ~~[(3) If the commissioner does not make the determination that instructional materials funding has been made available under this subsection, the commissioner shall determine no later than August 31 of each subsequent school year whether instructional materials funding has been made available. If the commissioner determines that instructional materials funding has been made available, the commissioner shall notify the State Board of Education and school districts that this section shall be implemented for the following school year.]~~

(b) ~~(a)~~ Introduction.

- (1) In Grade 4, students examine the history of Texas from the early beginnings to the present within the context of influences of North America. Historical content focuses on Texas history, including the Texas Revolution, establishment of the Republic of Texas, and subsequent annexation to the United States. Students discuss important issues, events, and individuals of the 19th, 20th, and 21st centuries. Students conduct a thorough study of regions in Texas and North America resulting from human activity and from physical features. The location, distribution, and patterns of economic activities and settlement in Texas further enhance the concept of regions. Students describe how early American Indians in Texas and North America met their basic economic needs. Students identify motivations for European exploration and colonization and reasons for the establishment of Spanish settlements and missions. Students explain how American Indians governed themselves and identify characteristics of Spanish colonial and Mexican governments in Texas. Students recite and explain the meaning of the Pledge to the Texas Flag. Students identify the contributions of people of various racial, ethnic, and religious groups to Texas and describe the impact of science and technology on life in the state. Students use critical-thinking skills to identify cause-and-effect relationships, compare and contrast, and make generalizations and predictions.
- (2) To support the teaching of the essential knowledge and skills, the use of a variety of rich primary and secondary source material such as documents, biographies, novels, speeches, letters, poetry, songs, and artworks is encouraged. Where appropriate, local topics should be included. Motivating resources are available from museums, historical sites, presidential libraries, and local and state preservation societies.
- (3) The eight strands of the essential knowledge and skills for social studies are intended to be integrated for instructional purposes. Skills listed in the social studies skills strand in subsection ~~(c)~~ ~~(b)~~ of this section should be incorporated into the teaching of all essential knowledge and skills for social studies. A greater depth of understanding of complex content material can be attained when integrated social studies content from the various disciplines and critical-thinking skills are taught together. Statements that contain the word "including" reference content that must be mastered, while those containing the phrase "such as" are intended as possible illustrative examples.
- (4) Students identify the role of the U.S. free enterprise system within the parameters of this course and understand that this system may also be referenced as capitalism or the free market system.
- (5) Throughout social studies in Kindergarten-Grade 12, students build a foundation in history; geography; economics; government; citizenship; culture; science, technology, and society; and social studies skills. The content, as appropriate for the grade level or course, enables students to understand the importance of patriotism, function in a free enterprise society, and appreciate the basic democratic values of our state and nation as referenced in the Texas Education Code (TEC), §28.002(h).

- (6) Students understand that a constitutional republic is a representative form of government whose representatives derive their authority from the consent of the governed, serve for an established tenure, and are sworn to uphold the constitution.
- (7) State and federal laws mandate a variety of celebrations and observances, including Celebrate Freedom Week.
  - (A) Each social studies class shall include, during Celebrate Freedom Week as provided under the TEC, §29.907, or during another full school week as determined by the board of trustees of a school district, appropriate instruction concerning the intent, meaning, and importance of the Declaration of Independence and the U.S. Constitution, including the Bill of Rights, in their historical contexts. The study of the Declaration of Independence must include the study of the relationship of the ideas expressed in that document to subsequent American history, including the relationship of its ideas to the rich diversity of our people as a nation of immigrants, the American Revolution, the formulation of the U.S. Constitution, and the abolitionist movement, which led to the Emancipation Proclamation and the women's suffrage movement.
  - (B) Each school district shall require that, during Celebrate Freedom Week or other week of instruction prescribed under subparagraph (A) of this paragraph, students in Grades 3-12 study and recite the following text from the Declaration of Independence: "We hold these Truths to be self-evident, that all Men are created equal, that they are endowed by their Creator with certain unalienable Rights, that among these are Life, Liberty and the Pursuit of Happiness--That to secure these Rights, Governments are instituted among Men, deriving their just Powers from the Consent of the Governed."
- (8) Students discuss how and whether the actions of U.S. citizens and the local, state, and federal governments have achieved the ideals espoused in the founding documents.

(c) ~~(b)~~ Knowledge and skills.

- (1) History. The student understands the origins, similarities, and differences of American Indian groups in Texas before European exploration. The student is expected to:
  - (A) explain the possible origins of American Indian groups in Texas;
  - (B) identify and compare the ways of life of American Indian groups in Texas before European exploration such as the Lipan Apache, Karankawa, Caddo, and Jumano;
  - (C) describe the cultural regions in which American Indians lived such as Gulf, Plains, Puebloan, and Southeastern; and
  - (D) locate American Indian groups remaining in Texas such as the Ysleta Del Sur Pueblo, Alabama-Coushatta, and Kickapoo.
- (2) History. The student understands the causes and effects of European exploration and colonization of Texas. The student is expected to:
  - (A) summarize motivations for European exploration and settlement of Texas, including economic opportunity, competition, and the desire for expansion;
  - (B) identify the accomplishments and explain the impact of significant explorers, including Cabeza de Vaca; Francisco Coronado; and René Robert Cavelier, Sieur de la Salle, on the settlement of Texas;
  - (C) explain when, where, and why the Spanish established settlements and Catholic missions in Texas as well as important individuals;
  - (D) identify Texas' role in the Mexican War of Independence and the war's impact on the development of Texas; and
  - (E) identify the accomplishments and explain the economic motivations and impact of significant empresarios, including Stephen F. Austin and Martín de León, on the settlement of Texas.

- (3) History. The student understands the importance of the Texas Revolution, the Republic of Texas, and the annexation of Texas to the United States. The student is expected to:
- (A) analyze the causes, major events, and effects of the Texas Revolution, including the Battle of the Alamo, the Texas Declaration of Independence, the Runaway Scrape, and the Battle of San Jacinto;
  - (B) summarize the significant contributions of individuals such as William B. Travis, James Bowie, David Crockett, Juan N. Seguín, Plácido Benavides, José Francisco Ruiz, Antonio López de Santa Anna, Susanna Dickinson, and Enrique Esparza;
  - (C) identify leaders important to the founding of Texas as a republic and state, including José Antonio Navarro, Sam Houston, Mirabeau Lamar, and Anson Jones;
  - (D) describe the successes, problems, and organizations of the Republic of Texas such as the establishment of a constitution, economic struggles, relations with American Indians, and the Texas Rangers; and
  - (E) explain the events that led to the annexation of Texas to the United States and the impact of the U.S.-Mexican War.
- (4) History. The student understands the political, economic, and social changes in Texas during the last half of the 19th century. The student is expected to:
- (A) describe the impact of the Civil War and Reconstruction on Texas;
  - (B) explain the growth, development, and impact of the cattle industry such as contributions made by Charles Goodnight, Richard King, and Lizzie Johnson;
  - (C) explain the effects of the railroad industry on life in Texas, including changes to cities and major industries; and
  - (D) explain the effects on American Indian life brought about by the Red River War, building of U.S. forts and railroads, and loss of buffalo.
- (5) History. The student understands important issues, events, and individuals of the 20th century in Texas. The student is expected to:
- (A) explain the impact of various events on life in Texas such as the Great Depression, the Dust Bowl, and World War II and notable individuals such as Audie Murphy, Cleto Rodríguez, and Bessie Coleman and other local individuals; and
  - (B) explain the development and impact of the oil and gas industry on industrialization and urbanization in Texas, including Spindletop and important people such as Pattillo Higgins.
- (6) Geography. The student understands the concept of regions. The student is expected to:
- (A) identify, locate, and describe the physical regions of Texas (Mountains and Basins, Great Plains, North Central Plains, Coastal Plains), including their characteristics such as landforms, climate, vegetation, and economic activities; and
  - (B) compare the physical regions of Texas (Mountains and Basins, Great Plains, North Central Plains, Coastal Plains).
- (7) Geography. The student understands the location and patterns of settlement and the geographic factors that influence where people live. The student is expected to:
- (A) explain the geographic factors such as landforms and climate that influence patterns of settlement and the distribution of population in Texas, past and present; and
  - (B) identify and explain patterns of settlement such as the location of towns and cities in Texas at different time periods.

- (8) Geography. The student understands how people adapt to and modify their environment. The student is expected to:
- (A) describe ways people have adapted to and modified their environment in Texas, past and present, such as timber clearing, agricultural production, wetlands drainage, energy production, and construction of dams;
  - (B) explain reasons why people have adapted to and modified their environment in Texas, past and present, such as the use of natural resources to meet basic needs, facilitate transportation, and enhance recreational activities; and
  - (C) compare the positive and negative consequences of human modification of the environment in Texas, past and present.
- (9) Economics. The student understands the basic economic activities of early societies in Texas. The student is expected to:
- (A) explain the economic activities various early American Indian groups in Texas used to meet their needs and wants such as farming, trading, and hunting; and
  - (B) explain the economic activities early settlers to Texas used to meet their needs and wants.
- (10) Economics. The student understands the characteristics and benefits of the free enterprise system in Texas. The student is expected to:
- (A) describe how the free enterprise system works, including supply and demand;
  - (B) identify examples of the benefits of the free enterprise system such as choice and opportunity; and
  - (C) describe the development of the free enterprise system in Texas such as the growth of cash crops by early colonists and the railroad boom.
- (11) Economics. The student understands patterns of work and economic activities in Texas. The student is expected to:
- (A) identify how people in different regions of Texas earn their living, past and present;
  - (B) explain how physical geographic factors such as climate and natural resources have influenced the location of economic activities in Texas;
  - (C) identify the effects of exploration, immigration, migration, and limited resources on the economic development and growth of Texas; and
  - (D) explain how developments in transportation and communication have influenced economic activities in Texas.
- (12) Government. The student understands how people organized governments in different ways during the early development of Texas. The student is expected to:
- (A) compare how various American Indian groups such as the Caddo and the Comanche governed themselves; and
  - (B) compare characteristics of the Spanish colonial government and the early Mexican governments in Texas.
- (13) Government. The student understands important ideas in historical documents of Texas and the United States. The student is expected to:
- (A) identify the purposes and explain the importance of the Texas Declaration of Independence and the Texas Constitution;
  - (B) identify and explain the basic functions of the three branches of government according to the Texas Constitution; and

- (C) identify the intent, meaning, and importance of the Declaration of Independence, the U.S. Constitution, and the Bill of Rights (Celebrate Freedom Week).
- (14) Citizenship. The student understands important customs, symbols, and celebrations of Texas. The student is expected to:
- (A) explain the meaning of various patriotic symbols and landmarks of Texas, including the six flags that flew over Texas, the Alamo, and the San Jacinto Monument;
  - (B) sing or recite "Texas, Our Texas";
  - (C) recite and explain the meaning of the Pledge to the Texas Flag; and
  - (D) describe the origins and significance of state celebrations such as Texas Independence Day and Juneteenth.
- (15) Citizenship. The student understands the importance of active individual participation in the democratic process. The student is expected to:
- (A) identify important individuals who have participated voluntarily in civic affairs at state and local levels such as Adina de Zavala and Clara Driscoll;
  - (B) explain how individuals can participate voluntarily in civic affairs at state and local levels through activities such as respectfully holding public officials to their word, writing letters, and participating in historic preservation and service projects;
  - (C) explain the duty of the individual in state and local elections such as being informed and voting;
  - (D) identify the importance of historical figures and important individuals who modeled active participation in the democratic process such as Sam Houston, Barbara Jordan, Lorenzo de Zavala, Ann Richards, Henry B. González, Wallace Jefferson, and other local individuals; and
  - (E) explain how to contact elected and appointed leaders in state and local governments ; and ;
  - (F) use voting as a method for group decision making.
- (16) Citizenship. The student understands the importance of effective leadership in a constitutional republic. The student is expected to:
- (A) identify leaders in state, local, and national governments, including the governor, local members of the Texas Legislature, the local mayor, U.S. senators, local U.S. representatives, and Texans who have been president of the United States; and
  - (B) identify leadership qualities of state and local leaders, past and present.
- (17) Culture. The student understands the contributions of people of various racial, ethnic, and religious groups to Texas culture. The student is expected to:
- (A) identify customs, celebrations, and traditions of various cultural, regional, and local groups in Texas such as Cinco de Mayo, Oktoberfest, and Fiesta San Antonio; and
  - (B) summarize the contributions of artists of various racial, ethnic, and religious groups in the development of Texas culture such as Lydia Mendoza, Chelo Silva, and Julius Lorenzo Cobb Bledsoe.
- (18) Science, technology, and society. The student understands the impact of science and technology on life in Texas. The student is expected to:
- (A) identify famous inventors and scientists such as Gail Borden, Joseph Glidden, Michael DeBakey, and Millie Hughes-Fulford and their contributions; and
  - (B) describe how scientific discoveries and innovations such as in aerospace, agriculture, energy, and technology have benefited individuals, businesses, and society in Texas.

- (19) Social studies skills. The student applies critical-thinking skills to organize and use information acquired from a variety of valid sources, including technology. The student is expected to:
- (A) differentiate between, locate, and use valid primary and secondary sources such as technology; interviews; biographies; oral, print, and visual material; documents; and artifacts to acquire information about Texas;
  - (B) differentiate and compare the information about a specific issue or event provided in primary and secondary sources;
  - (C) [~~(B)~~] analyze information by applying absolute and relative chronology through sequencing, categorizing, identifying cause-and-effect relationships, comparing, contrasting, finding the main idea, summarizing, making generalizations and predictions, and drawing inferences and conclusions;
  - (D) [~~(C)~~] organize and interpret information in outlines, reports, databases, and visuals, including graphs, charts, timelines, and maps; [~~and~~]
  - (E) [~~(D)~~] identify different points of view about an issue, topic, historical event, or current event ; [;]
  - (F) identify the central claim in a primary or secondary source; and
  - (G) develop and communicate a claim and supporting evidence visually, orally, or in writing related to a social studies topic.
- (20) Social studies skills. The student uses geographic tools to collect, analyze, and interpret data. The student is expected to:
- (A) apply mapping elements, including grid systems, legends, symbols, scales, and compass roses, to create and interpret maps; and
  - (B) interpret geographic data, population distribution, and natural resources into a variety of formats such as graphs and maps.
- (21) Social studies skills. The student communicates in written, oral, and visual forms. The student is expected to:
- (A) use social studies terminology correctly;
  - (B) incorporate main and supporting ideas in verbal and written communication;
  - (C) express ideas orally based on research and experiences; [~~and~~]
  - (D) create written and visual material such as journal entries, reports, graphic organizers, outlines, and bibliographies ; and [;]
  - (E) apply foundational language skills to engage in civil discourse about social studies topics, including those with multiple perspectives.
- (22) Social studies skills. The student uses problem-solving and decision-making skills, working independently and with others. The student is expected to :
- (A) use democratic procedures to simulate making decisions on school, local, or state issues; and
  - (B) use problem-solving and decision-making processes to identify a problem, gather information, list and consider options, consider advantages and disadvantages, choose and implement a solution, and evaluate the effectiveness of the solution.

**§113.16. Social Studies, Grade 5, Adopted 2022 [~~2018~~] .**

- (a) Implementation. The provisions of this section shall be implemented by school districts beginning with the 2025-2026 school year.

- (1) No later than July 31, 2024, the commissioner of education shall determine whether instructional materials funding has been made available to Texas public schools for materials that cover the essential knowledge and skills identified in this section.
- (2) If the commissioner makes the determination that instructional materials funding has been made available, this section shall be implemented beginning with the 2025-2026 school year and apply to the 2025-2026 and subsequent school years.
- (3) If the commissioner does not make the determination that instructional materials funding has been made available under this subsection, the commissioner shall determine no later than August 31 of each subsequent school year whether instructional materials funding has been made available. If the commissioner determines that instructional materials funding has been made available, the commissioner shall notify the State Board of Education and school districts that this section shall be implemented for the following school year.

(b) ~~(a)~~ Introduction.

- (1) In Grade 5, students survey the history of the United States from 1565 to the present. Historical content includes the colonial period, the American Revolution, the establishment of the U.S. Constitution and American identity, westward expansion, the Civil War and Reconstruction, immigration and industrialization, and the 20th and 21st centuries. Students study a variety of regions in the United States that result from physical features and human activity and identify how people adapt to and modify the environment. Students explain the characteristics and benefits of the free enterprise system and describe economic activities in the United States. Students identify the roots of representative government in this nation as well as the important ideas in the Declaration of Independence and the U.S. Constitution. Students study the fundamental rights guaranteed in the Bill of Rights. Students examine the importance of effective leadership in a constitutional republic and identify important leaders in the national government. Students recite and explain the meaning of the Pledge of Allegiance to the United States Flag. Students describe the cultural impact of various racial, ethnic, and religious groups in the nation and identify the accomplishments of notable individuals in the fields of science and technology. Students explain symbols, traditions, and landmarks that represent American beliefs and principles. Students use critical-thinking skills to sequence, categorize, and summarize information and to draw inferences and conclusions.
- (2) To support the teaching of the essential knowledge and skills, the use of a variety of rich primary and secondary source material such as documents, biographies, novels, speeches, letters, poetry, songs, and artworks is encouraged. Motivating resources are available from museums, historical sites, presidential libraries, and local and state preservation societies.
- (3) The eight strands of the essential knowledge and skills for social studies are intended to be integrated for instructional purposes. Skills listed in the social studies skills strand in subsection ~~(c)~~ ~~(b)~~ of this section should be incorporated into the teaching of all essential knowledge and skills for social studies. A greater depth of understanding of complex content material can be attained when integrated social studies content from the various disciplines and critical-thinking skills are taught together. Statements that contain the word "including" reference content that must be mastered, while those containing the phrase "such as" are intended as possible illustrative examples.
- (4) Students identify the role of the U.S. free enterprise system within the parameters of this course and understand that this system may also be referenced as capitalism or the free market system.
- (5) Throughout social studies in Kindergarten-Grade 12, students build a foundation in history; geography; economics; government; citizenship; culture; science, technology, and society; and social studies skills. The content, as appropriate for the grade level or course, enables students to understand the importance of patriotism, function in a free enterprise society, and appreciate the basic democratic values of our state and nation as referenced in the Texas Education Code (TEC), §28.002(h).



- (6) Students understand that a constitutional republic is a representative form of government whose representatives derive their authority from the consent of the governed, serve for an established tenure, and are sworn to uphold the constitution.
- (7) State and federal laws mandate a variety of celebrations and observances, including Celebrate Freedom Week.
  - (A) Each social studies class shall include, during Celebrate Freedom Week as provided under the TEC, §29.907, or during another full school week as determined by the board of trustees of a school district, appropriate instruction concerning the intent, meaning, and importance of the Declaration of Independence and the U.S. Constitution, including the Bill of Rights, in their historical contexts. The study of the Declaration of Independence must include the study of the relationship of the ideas expressed in that document to subsequent American history, including the relationship of its ideas to the rich diversity of our people as a nation of immigrants, the American Revolution, the formulation of the U.S. Constitution, and the abolitionist movement, which led to the Emancipation Proclamation and the women's suffrage movement.
  - (B) Each school district shall require that, during Celebrate Freedom Week or other week of instruction prescribed under subparagraph (A) of this paragraph, students in Grades 3-12 study and recite the following text from the Declaration of Independence: "We hold these Truths to be self-evident, that all Men are created equal, that they are endowed by their Creator with certain unalienable Rights, that among these are Life, Liberty and the Pursuit of Happiness--That to secure these Rights, Governments are instituted among Men, deriving their just Powers from the Consent of the Governed."
- (8) Students discuss how and whether the actions of U.S. citizens and the local, state, and federal governments have achieved the ideals espoused in the founding documents.

(c) ~~(b)~~ Knowledge and skills.

- (1) History. The student understands the reasons for and the role of key people in the European colonization of North America beginning in 1565, the founding of St. Augustine. The student is expected to:
  - (A) explain when, where, and why groups of people explored, colonized, and settled in the United States, including the search for religious freedom and economic gain; and
  - (B) describe the accomplishments of significant individuals who settled for religious freedom and economic gain during the colonial period, including William Bradford, Anne Hutchinson, William Penn, John Smith, and Roger Williams.
- (2) History. The student understands how conflict between the American colonies and Great Britain led to American independence and the formation of the United States. The student is expected to:
  - (A) analyze the causes and effects of events prior to and during the American Revolution, including the taxation resulting from the French and Indian War and the colonist response to taxation such as the Boston Tea Party;
  - (B) identify the Founding Fathers and Patriot heroes, including John Adams, Benjamin Franklin, Thomas Jefferson, the Sons of Liberty, and George Washington, and their motivations and contributions during the revolutionary period; and
  - (C) summarize the results of the American Revolution, including the establishment of the United States.
- (3) History. The student understands the significant individuals who contributed to the creation of the U.S. Constitution and the government it established. The student is expected to identify the contributions of Founding Fathers James Madison and George Mason who helped create the U.S. Constitution.
- (4) History. The student understands political, economic, and social changes that occurred in the United States during the 19th century. The student is expected to:

- (A) describe the causes and effects of the War of 1812 such as impressment of sailors, territorial conflicts with Great Britain, and the increase in U.S. manufacturing;
  - (B) identify and explain how changes resulting from the Industrial Revolution led to conflict among sections of the United States;
  - (C) identify significant events and concepts associated with U.S. territorial expansion, including the Louisiana Purchase, the expedition of Lewis and Clark, and Manifest Destiny;
  - (D) explain the central role of the expansion of slavery in causing sectionalism, disagreement over states' rights, and the Civil War;
  - (E) explain the effects of the Civil War, including Reconstruction and the 13th, 14th, and 15th amendments to the U.S. Constitution; and
  - (F) identify the challenges, opportunities, and contributions of people from various American Indian and immigrant groups such as the settlement of the frontier and building of the Transcontinental Railroad.
- (5) History. The student understands important issues, events, and individuals in the United States during the 20th and 21st centuries. The student is expected to:
- (A) explain the significance of issues and events of the 20th century such as industrialization, urbanization, the Great Depression, the world wars, the civil rights movement, and military actions;
  - (B) analyze various issues and events of the 21st century such as the War on Terror and the 2008 presidential election; and
  - (C) identify the accomplishments and contributions of individuals and groups such as Susan B. Anthony, Martin Luther King Jr., Rosa Parks, Cesar Chavez, Franklin D. Roosevelt, Ronald Reagan, the Tuskegee Airmen, and the 442nd Regimental Combat Team in the areas of civil rights, women's rights, military actions, and politics.
- (6) Geography. The student understands places and regions in the United States. The student is expected to:
- (A) describe political and economic regions in the United States that result from patterns of human activity;
  - (B) describe regions in the United States based on physical characteristics such as landform, climate, and vegetation;
  - (C) locate on a map important political features such as the five largest cities by population in the United States and the 50 states; and
  - (D) create a map of important physical features such as the Appalachian Mountains, Great Lakes, Mississippi River, Great Plains, and Rocky Mountains.
- (7) Geography. The student understands the location and patterns of settlement and the geographic factors that influence where people live. The student is expected to:
- (A) identify and describe the patterns of settlement such as rural, urban, and suburban;
  - (B) explain the geographic factors that influence patterns of settlement and the distribution of population in the United States; and
  - (C) analyze the geographic factors that influence the location of the five largest urban areas in the United States and explain their distribution.
- (8) Geography. The student understands how people adapt to and modify their environment. The student is expected to:

- (A) describe how and why people have adapted to and modified their environment in the United States such as the use of human resources to meet basic needs; and
  - (B) analyze the positive and negative consequences of human modification of the environment in the United States.
- (9) Economics. The student understands the basic economic patterns of early societies in the United States. The student is expected to:
- (A) explain the economic patterns of early European colonies; and
  - (B) identify major industries of colonial America such as shipbuilding and growing of cash crops.
- (10) Economics. The student understands the development, characteristics, and benefits of the free enterprise system in the United States. The student is expected to:
- (A) identify the development of the free enterprise system in colonial America and the United States;
  - (B) describe how the free enterprise system works in the United States; and
  - (C) give examples of the benefits of the free enterprise system in the United States.
- (11) Economics. The student understands the impact of supply and demand on consumers and producers in a free enterprise system. The student is expected to:
- (A) explain how supply and demand affects consumers in the United States; and
  - (B) evaluate the effects of supply and demand on industry and agriculture, including the plantation system, in the United States.
- (12) Economics. The student understands patterns of work and economic activities in the United States. The student is expected to:
- (A) compare how people in different regions of the United States earn a living, past and present;
  - (B) identify and explain how geographic factors have influenced the location of economic activities in the United States;
  - (C) analyze the effects of immigration and migration on the economic development and growth of the United States; and
  - (D) describe the impact of mass production, specialization, and division of labor on the economic growth of the United States.
- (13) Government. The student understands the organization of governments in colonial America. The student is expected to:
- (A) compare the systems of government of early European colonists, including representative government and monarchy; and
  - (B) identify examples of representative government in the American colonies, including the Mayflower Compact and the Virginia House of Burgesses.
- (14) Government. The student understands important ideas in the Declaration of Independence, the U.S. Constitution, and the Bill of Rights. The student is expected to:
- (A) explain the purposes, key elements, and the importance of the Declaration of Independence;
  - (B) explain the purposes of the U.S. Constitution as identified in the Preamble; and
  - (C) explain the reasons for the creation of the Bill of Rights and its importance.

- (15) Government. The student understands the framework of government created by the U.S. Constitution of 1787. The student is expected to:
- (A) identify and explain the basic functions of the three branches of government;
  - (B) identify the reasons for and describe the system of checks and balances outlined in the U.S. Constitution; and
  - (C) distinguish between national and state governments and compare their responsibilities in the U.S. federal system.
- (16) Citizenship. The student understands important symbols, customs, celebrations, and landmarks that represent American beliefs and principles that contribute to our national identity. The student is expected to:
- (A) explain various patriotic symbols, including Uncle Sam; national celebrations such as Labor Day; and political symbols such as the donkey and elephant;
  - (B) sing or recite "The Star-Spangled Banner" and explain its history;
  - (C) recite and explain the meaning of the Pledge of Allegiance to the United States Flag; and
  - (D) explain the significance of important landmarks, including the White House, the Statue of Liberty, and Mount Rushmore.
- (17) Citizenship. The student understands the importance of individual participation in the democratic process at the local, state, and national levels. The student is expected to:
- (A) explain why individuals have a duty to participate in civic affairs at the local, state, and national levels; and
  - (B) explain how to contact elected and appointed leaders in local, state, and national governments ; and [ ]
  - (C) use voting as a method for group decision making.
- (18) Citizenship. The student understands the importance of effective leadership in a constitutional republic. The student is expected to:
- (A) identify past and present leaders in the national government, including the president and various members of Congress, and their political parties; and
  - (B) identify leadership qualities of national leaders, past and present.
- (19) Citizenship. The student understands the fundamental rights of American citizens guaranteed in the Bill of Rights. The student is expected to describe the fundamental rights guaranteed in the Bill of Rights, including freedom of religion, speech, and press; the right to assemble and petition the government; the right to keep and bear arms; the right to trial by jury; and the right to an attorney.
- (20) Culture. The student understands the relationship between the arts and the times during which they were created. The student is expected to:
- (A) identify significant examples of art, music, and literature from various periods in U.S. history such as the painting *American Progress*, "Yankee Doodle," and "Paul Revere's Ride"; and
  - (B) explain how examples of art, music, and literature reflect the times during which they were created.
- (21) Culture. The student understands the contributions of people of various racial, ethnic, and religious groups to the United States culture. The student is expected to:
- (A) describe customs and traditions of various racial, ethnic, and religious groups in the United States; and

- (B) summarize the contributions of people of various racial, ethnic, and religious groups to our national identity.
- (22) Science, technology, and society. The student understands the impact of science and technology on society in the United States. The student is expected to:
- (A) identify the accomplishments of notable individuals in the fields of science and technology such as Benjamin Franklin, Eli Whitney, John Deere, Thomas Edison, Alexander Graham Bell, George Washington Carver, the Wright Brothers, and Neil Armstrong;
- (B) identify how scientific discoveries, technological innovations, and the rapid growth of technology industries have advanced the economic development of the United States, including the transcontinental railroad and the space program; and
- (C) explain how scientific discoveries and technological innovations in the fields of medicine, communication, and transportation have benefited individuals and society in the United States.
- (23) Social studies skills. The student applies critical-thinking skills to organize and use information acquired from a variety of valid sources, including technology. The student is expected to:
- (A) differentiate between, locate, and use valid primary and secondary sources such as technology; interviews; biographies; oral, print, and visual material; documents; and artifacts to acquire information about the United States;
- (B) identify and ask questions about the credibility of different kinds of primary and secondary sources;
- (C) [~~B~~] analyze information by applying absolute and relative chronology through sequencing, categorizing, identifying cause-and-effect relationships, comparing, contrasting, finding the main idea, summarizing, making generalizations and predictions, and drawing inferences and conclusions;
- (D) [~~C~~] organize and interpret information in outlines, reports, databases, and visuals, including graphs, charts, timelines, and maps;
- (E) [~~D~~] identify different points of view about an issue, topic, historical event, or current event; [~~and~~]
- (F) [~~E~~] identify the historical context of an event ; [ ]
- (G) identify the central claim in a primary or secondary source; and
- (H) develop and communicate a claim and supporting evidence visually, orally, or in writing related to a social studies topic.
- (24) Social studies skills. The student uses geographic tools to collect, analyze, and interpret data. The student is expected to:
- (A) apply mapping elements, including grid systems, legends, symbols, scales, and compass roses, to create and interpret maps; and
- (B) interpret geographic data, population distribution, and natural resources into a variety of formats such as graphs and maps.
- (25) Social studies skills. The student communicates in written, oral, and visual forms. The student is expected to:
- (A) use social studies terminology correctly;
- (B) incorporate main and supporting ideas in verbal and written communication;
- (C) express ideas orally based on research and experiences; [~~and~~]

- (D) create written and visual material such as journal entries, reports, graphic organizers, outlines, and bibliographies ; and [ ]
  - (E) apply foundational language skills to engage in civil discourse about social studies topics, including those with multiple perspectives.
- (26) Social studies skills. The student uses problem-solving and decision-making skills, working independently and with others. The student is expected to :
- (A) use democratic procedures to simulate making decisions on school, local, or state issues;  
and
  - (B) use problem-solving and decision-making processes to identify a problem, gather information, list and consider options, consider advantages and disadvantages, choose and implement a solution, and evaluate the effectiveness of the solution.

## Chapter 113. Texas Essential Knowledge and Skills for Social Studies

### Subchapter B. Middle School

#### ~~§113.17. Implementation of Texas Essential Knowledge and Skills for Social Studies, Middle School, Adopted 2018.~~

~~[The provisions of §§113.18-113.20 of this subchapter shall be implemented by school districts beginning with the 2019-2020 school year.]~~

#### §113.18. Social Studies, Grade 6, Adopted 2022 ~~[2018]~~ .

(a) Implementation. The provisions of this section shall be implemented by school districts beginning with the 2024-2025 ~~[2025-2026]~~ school year.

~~[(1) — No later than July 31, 2024, the commissioner of education shall determine whether instructional materials funding has been made available to Texas public schools for materials that cover the essential knowledge and skills identified in this section.]~~

~~[(2) — If the commissioner makes the determination that instructional materials funding has been made available, this section shall be implemented beginning with the 2025-2026 school year and apply to the 2025-2026 and subsequent school years.]~~

~~[(3) — If the commissioner does not make the determination that instructional materials funding has been made available under this subsection, the commissioner shall determine no later than August 31 of each subsequent school year whether instructional materials funding has been made available. If the commissioner determines that instructional materials funding has been made available, the commissioner shall notify the State Board of Education and school districts that this section shall be implemented for the following school year.]~~

(b) ~~[(a)]~~ Introduction.

- (1) In Grade 6, students study people, places, and societies of the contemporary world. Societies for study are from the following regions of the world: Europe, Russia and the Eurasian republics, North America, Central America and the Caribbean, South America, Southwest Asia-North Africa, Sub-Saharan Africa, South Asia, East Asia, Southeast Asia, Australia, and the Pacific realm. Students describe the influence of individuals and groups on historical and contemporary events in those societies and identify the locations and geographic characteristics of various societies. Students identify different ways of organizing economic and governmental systems. The concepts of limited and unlimited government are introduced, and students describe the nature of citizenship in various societies. Students compare institutions common to all societies such as government, education, and religious institutions. Students explain how the level of technology affects the development of the various societies and identify different points of view about events. The concept of frame of reference is introduced as an influence on an individual's point of view.
- (2) To support the teaching of the essential knowledge and skills, the use of a variety of rich primary and secondary source material such as biographies, autobiographies, novels, speeches, letters, poetry, songs, and artworks is encouraged. Motivating resources are available from museums, art galleries, and historical sites.
- (3) The eight strands of the essential knowledge and skills for social studies are intended to be integrated for instructional purposes. Skills listed in the social studies skills strand in subsection ~~(c)~~ ~~[(b)]~~ of this section should be incorporated into the teaching of all essential knowledge and skills for social studies. A greater depth of understanding of complex content material can be attained when integrated social studies content from the various disciplines and critical-thinking skills are taught together. Statements that contain the word "including" reference content that must be mastered, while those containing the phrase "such as" are intended as possible illustrative examples.

- (4) Students identify the role of the U.S. free enterprise system within the parameters of this course and understand that this system may also be referenced as capitalism or the free market system.
- (5) Throughout social studies in Kindergarten-Grade 12, students build a foundation in history; geography; economics; government; citizenship; culture; science, technology, and society; and social studies skills. The content, as appropriate for the grade level or course, enables students to understand the importance of patriotism, function in a free enterprise society, and appreciate the basic democratic values of our state and nation as referenced in the Texas Education Code (TEC), §28.002(h).
- (6) Students understand that a constitutional republic is a representative form of government whose representatives derive their authority from the consent of the governed, serve for an established tenure, and are sworn to uphold the constitution.
- (7) State and federal laws mandate a variety of celebrations and observances, including Celebrate Freedom Week.
  - (A) Each social studies class shall include, during Celebrate Freedom Week as provided under the TEC, §29.907, or during another full school week as determined by the board of trustees of a school district, appropriate instruction concerning the intent, meaning, and importance of the Declaration of Independence and the U.S. Constitution, including the Bill of Rights, in their historical contexts. The study of the Declaration of Independence must include the study of the relationship of the ideas expressed in that document to subsequent American history, including the relationship of its ideas to the rich diversity of our people as a nation of immigrants, the American Revolution, the formulation of the U.S. Constitution, and the abolitionist movement, which led to the Emancipation Proclamation and the women's suffrage movement.
  - (B) Each school district shall require that, during Celebrate Freedom Week or other week of instruction prescribed under subparagraph (A) of this paragraph, students in Grades 3-12 study and recite the following text from the Declaration of Independence: "We hold these Truths to be self-evident, that all Men are created equal, that they are endowed by their Creator with certain unalienable Rights, that among these are Life, Liberty and the Pursuit of Happiness--That to secure these Rights, Governments are instituted among Men, deriving their just Powers from the Consent of the Governed."
- (8) Students discuss how and whether the actions of U.S. citizens and the local, state, and federal governments have achieved the ideals espoused in the founding documents.

(c) ~~(b)~~ Knowledge and skills.

- (1) History. The student understands that historical events influence contemporary events. The student is expected to:
  - (A) trace characteristics of various contemporary societies in regions that resulted from historical events or factors such as colonization, immigration, and trade; and
  - (B) analyze the historical background of various contemporary societies to evaluate relationships between past conflicts and current conditions.
- (2) History. The student understands the influences of individuals and groups from various cultures on various historical and contemporary societies. The student is expected to:
  - (A) identify and describe the historical influence of individuals or groups on various contemporary societies; and
  - (B) describe the social, political, economic, and cultural contributions of individuals and groups from various societies, past and present.
- (3) Geography. The student understands the factors that influence the locations and characteristics of locations of various contemporary societies on maps and/or globes. The student is expected to:



- (A) identify and explain the geographic factors responsible for patterns of population in places and regions;
  - (B) explain ways in which human migration influences the character of places and regions;
  - (C) identify and locate major physical and human geographic features such as landforms, water bodies, and urban centers of various places and regions; and
  - (D) identify the location of major world countries for each of the world regions.
- (4) Geography. The student understands how geographic factors influence the economic development and political relationships of societies. The student is expected to:
- (A) explain the geographic factors responsible for the location of economic activities in places and regions; and
  - (B) identify geographic factors such as location, physical features, transportation corridors and barriers, and distribution of natural resources that influence a society's political relationships.
- (5) Geography. The student understands the impact of interactions between people and the physical environment on the development and conditions of places and regions. The student is expected to:
- (A) describe ways people have been impacted by physical processes such as earthquakes and climate;
  - (B) identify and analyze ways people have adapted to the physical environment in various places and regions; and
  - (C) identify and analyze ways people have modified the physical environment such as mining, irrigation, and transportation infrastructure.
- (6) Economics. The student understands the factors of production in a society's economy. The student is expected to:
- (A) describe ways in which the factors of production (natural resources, labor, capital, and entrepreneurs) influence the economies of various contemporary societies;
  - (B) identify problems that may arise when one or more of the factors of production is in relatively short supply; and
  - (C) explain the impact of the distribution of resources on international trade and economic interdependence among and within societies.
- (7) Economics. The student understands the various ways in which people organize economic systems. The student is expected to:
- (A) compare ways in which various societies organize the production and distribution of goods and services;
  - (B) compare and contrast free enterprise, socialist, and communist economies in various contemporary societies, including the benefits of the U.S. free enterprise system; and
  - (C) understand the importance of ethics in maintaining a functional free enterprise system.
- (8) Economics. The student understands categories of economic activities and the data used to measure a society's economic level. The student is expected to:
- (A) define and give examples of agricultural, retail, manufacturing (goods), and service industries; and
  - (B) describe levels of economic development of various societies using indicators such as life expectancy, gross domestic product (GDP), GDP per capita, and literacy.
- (9) Government. The student understands the concepts of limited and unlimited governments. The student is expected to:

- (A) describe and compare examples of limited and unlimited governments such as constitutional (limited) and totalitarian (unlimited);
  - (B) identify reasons for limiting the power of government; and
  - (C) identify and describe examples of human rights abuses by limited or unlimited governments such as the oppression of religious, ethnic, and political groups.
- (10) Government. The student understands various ways in which people organize governments. The student is expected to:
- (A) identify and give examples of governments with rule by one, few, or many;
  - (B) compare ways in which various societies such as China, Germany, India, and Russia organize government and how they function; and
  - (C) identify historical origins of democratic forms of government such as Ancient Greece.
- (11) Citizenship. The student understands that the nature of citizenship varies among societies. The student is expected to:
- (A) describe and compare roles and responsibilities of citizens in various contemporary societies, including the United States; and
  - (B) explain how opportunities for citizens to participate in and influence the political process vary among various contemporary societies.
- (12) Citizenship. The student understands the relationship among individual rights, responsibilities, duties, and freedoms in societies with representative governments. The student is expected to:
- (A) identify and explain the duty of civic participation in societies with representative governments; and
  - (B) explain relationships among rights, responsibilities, and duties in societies with representative governments.
- (13) Culture. The student understands the similarities and differences within and among cultures in various world societies. The student is expected to:
- (A) identify and describe common traits that define cultures and culture regions;
  - (B) define a multicultural society;
  - (C) analyze the experiences and contributions of diverse groups to multicultural societies; and
  - (D) identify and explain examples of conflict and cooperation between and among cultures.
- (14) Culture. The student understands that all societies have basic institutions in common even though the characteristics of these institutions may differ. The student is expected to:
- (A) identify institutions basic to all societies, including government, economic, educational, and religious institutions;
  - (B) compare characteristics of institutions in various contemporary societies; and
  - (C) analyze the efforts and activities institutions use to sustain themselves over time.
- (15) Culture. The student understands relationships that exist among world cultures. The student is expected to:
- (A) identify and describe means of cultural diffusion such as trade, travel, and war;
  - (B) identify and describe factors that influence cultural change such as improvements in communication, transportation, and economic development;
  - (C) analyze the impact of improved communication technology among cultures; and

- (D) identify the impact of cultural diffusion on individuals and world societies.
- (16) Culture. The student understands the relationship that exists between the arts and the societies in which they are produced. The student is expected to:
- (A) explain the relationships that exist between societies and their architecture, art, music, and literature;
  - (B) describe ways in which contemporary issues influence creative expressions; and
  - (C) identify examples of art, music, and literature that convey universal themes such as religion, justice, and the passage of time.
- (17) Culture. The student understands the relationships among religion, philosophy, and culture. The student is expected to:
- (A) explain the relationship among religious ideas, philosophical ideas, and cultures; and
  - (B) explain the significance of religious holidays and observances such as Christmas, Easter, Ramadan, the annual hajj, Yom Kippur, Rosh Hashanah, Diwali, and Vaisakhi in various contemporary societies.
- (18) Science, technology, and society. The student understands the influences of science and technology on contemporary societies. The student is expected to:
- (A) identify examples of scientific discoveries, technological innovations, and scientists and inventors that have shaped the world;
  - (B) explain how resources, economic factors, and political decisions affect the use of technology; and
  - (C) make predictions about future social, political, economic, cultural, and environmental impacts that may result from future scientific discoveries and technological innovations.
- (19) Social studies skills. The student applies critical-thinking skills to organize and use information acquired through established research methodologies from a variety of valid sources, including technology. The student is expected to:
- (A) differentiate between, locate, and use valid primary and secondary sources such as oral, print, and visual material and artifacts to acquire information about various world cultures;
  - (B) analyze information by sequencing, categorizing, identifying cause-and-effect relationships, comparing, contrasting, finding the main idea, summarizing, making generalizations and predictions, and drawing inferences and conclusions;
  - (C) organize and interpret information from outlines, reports, databases, and visuals, including graphs, charts, timelines, and maps; ~~and~~
  - (D) identify different points of view about an issue or current topic ; [ ]
  - (E) formulate and communicate visually, orally, or in writing a claim supported by evidence and reasoning related to a social studies topic; and
  - (F) evaluate a variety of historical and contemporary sources for validity, credibility, bias, and accuracy.
- (20) Social studies skills. The student uses geographic tools to collect, analyze, and interpret data. The student is expected to:
- (A) answer geographic questions, including: Where is it located? Why is it there? What is significant about its location? How is its location related to the location of other people, places, and environments? Using latitude and longitude, where is it located?;
  - (B) pose and answer questions about geographic distributions and patterns for various world regions and countries shown on maps, graphs, and charts;

- (C) compare various world regions and countries using data from maps, graphs, and charts; and
  - (D) create and interpret regional sketch maps, thematic maps, graphs, and charts depicting aspects such as population, disease, and economic activities of various world regions and countries.
- (21) Social studies skills. The student communicates in written, oral, and visual forms. The student is expected to:
- (A) use social studies terminology correctly;
  - (B) incorporate main and supporting ideas in verbal and written communication based on research;
  - (C) express ideas orally based on research and experiences;
  - (D) create written and visual material such as journal entries, reports, graphic organizers, outlines, and bibliographies based on research; ~~[and]~~
  - (E) use effective written communication skills, including proper citations to avoid plagiarism ; and [.]
  - (F) apply foundational language skills to engage in civil discourse about social studies topics, including those with multiple perspectives.
- (22) Social studies skills. The student uses problem-solving and decision-making skills, working independently and with others. The student is expected to :
- (A) describe governmental and democratic processes such as voting, due process, and caucuses using simulations and models; and
  - (B) use problem-solving and decision-making processes to identify a problem, gather information, list and consider options, consider advantages and disadvantages, choose and implement a solution, and evaluate the effectiveness of the solution.

**§113.19. Social Studies, Grade 7, Adopted 2022 [~~2018~~] .**

(a) Implementation. The provisions of this section shall be implemented by school districts beginning with the 2024-2025 [~~2025-2026~~] school year.

~~[(1) No later than July 31, 2024, the commissioner of education shall determine whether instructional materials funding has been made available to Texas public schools for materials that cover the essential knowledge and skills identified in this section.]~~

~~[(2) If the commissioner makes the determination that instructional materials funding has been made available, this section shall be implemented beginning with the 2025-2026 school year and apply to the 2025-2026 and subsequent school years.]~~

~~[(3) If the commissioner does not make the determination that instructional materials funding has been made available under this subsection, the commissioner shall determine no later than August 31 of each subsequent school year whether instructional materials funding has been made available. If the commissioner determines that instructional materials funding has been made available, the commissioner shall notify the State Board of Education and school districts that this section shall be implemented for the following school year.]~~

(b) ~~[(a)]~~ Introduction.

- (1) In Grade 7, students study the history of Texas from early times to the present. Content is presented with more depth and breadth than in Grade 4. Students examine the full scope of Texas history, including Natural Texas and its People; Age of Contact; Spanish Colonial; Mexican National; Revolution and Republic; Early Statehood; Texas in the Civil War and Reconstruction; Cotton, Cattle, and Railroads; Age of Oil; Texas in the Great Depression and World War II; Civil Rights and Conservatism; and Contemporary Texas eras. The focus in each era is on key

individuals, events, and issues and their impact. Students identify regions of Texas and the distribution of population within and among the regions and explain the factors that caused Texas to change from an agrarian to an urban society. Students describe the structure and functions of municipal, county, and state governments, explain the influence of the U.S. Constitution on the Texas Constitution, and examine the rights and responsibilities of Texas citizens. Students use primary and secondary sources to examine the rich and diverse cultural background of Texas as they identify the different racial and ethnic groups that settled in Texas to build a republic and then a state. Students analyze the impact of scientific discoveries and technological innovations on the development of Texas in various industries such as agricultural, energy, medical, computer, and aerospace. Students use primary and secondary sources to acquire information about Texas.

- (2) To support the teaching of the essential knowledge and skills, the use of a variety of rich primary and secondary source material such as biographies, autobiographies, novels, speeches, letters, diaries, poetry, songs, and images is encouraged. Motivating resources are available from museums, historical sites, presidential libraries, and local and state preservation societies.
- (3) The eight strands of the essential knowledge and skills for social studies are intended to be integrated for instructional purposes. Skills listed in the social studies skills strand in subsection (c) ~~(b)~~ of this section should be incorporated into the teaching of all essential knowledge and skills for social studies. A greater depth of understanding of complex content material can be attained when integrated social studies content from the various disciplines and critical-thinking skills are taught together. Statements that contain the word "including" reference content that must be mastered, while those containing the phrase "such as" are intended as possible illustrative examples.
- (4) Students identify the role of the U.S. free enterprise system within the parameters of this course and understand that this system may also be referenced as capitalism or the free market system.
- (5) Throughout social studies in Kindergarten-Grade 12, students build a foundation in history; geography; economics; government; citizenship; culture; science, technology, and society; and social studies skills. The content, as appropriate for the grade level or course, enables students to understand the importance of patriotism, function in a free enterprise society, and appreciate the basic democratic values of our state and nation as referenced in the Texas Education Code (TEC), §28.002(h).
- (6) Students understand that a constitutional republic is a representative form of government whose representatives derive their authority from the consent of the governed, serve for an established tenure, and are sworn to uphold the constitution.
- (7) State and federal laws mandate a variety of celebrations and observances, including Celebrate Freedom Week.
  - (A) Each social studies class shall include, during Celebrate Freedom Week as provided under the TEC, §29.907, or during another full school week as determined by the board of trustees of a school district, appropriate instruction concerning the intent, meaning, and importance of the Declaration of Independence and the U.S. Constitution, including the Bill of Rights, in their historical contexts. The study of the Declaration of Independence must include the study of the relationship of the ideas expressed in that document to subsequent American history, including the relationship of its ideas to the rich diversity of our people as a nation of immigrants, the American Revolution, the formulation of the U.S. Constitution, and the abolitionist movement, which led to the Emancipation Proclamation and the women's suffrage movement.
  - (B) Each school district shall require that, during Celebrate Freedom Week or other week of instruction prescribed under subparagraph (A) of this paragraph, students in Grades 3-12 study and recite the following text from the Declaration of Independence: "We hold these Truths to be self-evident, that all Men are created equal, that they are endowed by their Creator with certain unalienable Rights, that among these are Life, Liberty and the Pursuit of Happiness--That to secure these Rights, Governments are instituted among Men, deriving their just Powers from the Consent of the Governed."

- (8) Students discuss how and whether the actions of U.S. citizens and the local, state, and federal governments have achieved the ideals espoused in the founding documents.

(c) ~~(b)~~ Knowledge and skills.

- (1) History. The student understands traditional historical points of reference in Texas history. The student is expected to:
- (A) identify the major eras in Texas history, describe their defining characteristics, and explain the purpose of dividing the past into eras, including Natural Texas and its People; Age of Contact; Spanish Colonial; Mexican National; Revolution and Republic; Early Statehood; Texas in the Civil War and Reconstruction; Cotton, Cattle, and Railroads; Age of Oil; Texas in the Great Depression and World War II; Civil Rights; and Contemporary Texas; and
  - (B) explain the significance of the following dates: 1519, mapping of the Texas coast and first mainland Spanish settlement; 1718, founding of San Antonio; 1821, independence from Spain; 1836, Texas independence; 1845, annexation; 1861, Civil War begins; 1876, adoption of current state constitution; and 1901, discovery of oil at Spindletop.
- (2) History. The student understands how individuals, events, and issues through the Mexican National Era shaped the history of Texas. The student is expected to:
- (A) compare the cultures of American Indians in Texas prior to European colonization such as Gulf, Plains, Puebloan, and Southeastern;
  - (B) identify important individuals, events, and issues related to European exploration of Texas such as Alonso Álvarez de Pineda, Álvar Núñez Cabeza de Vaca, the search for gold, and the conflicting territorial claims between France and Spain;
  - (C) identify important individuals, events, and issues related to European colonization of Texas, including the establishment of Catholic missions, towns, and ranches, and the contributions of individuals such as Fray Damián Massanet, Antonio Margil de Jesús, and Francisco Hidalgo;
  - (D) identify the individuals, issues, and events related to Mexico becoming an independent nation and its impact on Texas, including Father Miguel Hidalgo, Texas involvement in the fight for independence, José Gutiérrez de Lara, the Battle of Medina, the Mexican federal Constitution of 1824, the merger of Texas and Coahuila as a state, the State Colonization Law of 1825, and slavery;
  - (E) identify the contributions of significant individuals, including Moses Austin, Stephen F. Austin, Erasmo Seguín, Martín De León, and Green DeWitt, during the Mexican settlement of Texas; and
  - (F) contrast Spanish, Mexican, and Anglo purposes for and methods of settlement in Texas.
- (3) History. The student understands how individuals, events, and issues related to the Texas Revolution shaped the history of Texas. The student is expected to:
- (A) describe the chain of events that led to the Texas Revolution, including the Fredonian Rebellion, the Mier y Terán Report, the Law of April 6, 1830, the Turtle Bayou Resolutions, and the arrest of Stephen F. Austin;
  - (B) explain the roles played by significant individuals during the Texas Revolution, including George Childress, Lorenzo de Zavala, James Fannin, Sam Houston, Antonio López de Santa Anna, Juan N. Seguín, and William B. Travis; and
  - (C) explain the issues surrounding significant events of the Texas Revolution, including the Battle of Gonzales; the siege of the Alamo, William B. Travis's letter "To the People of Texas and All Americans in the World," and the heroism of the diverse defenders who gave their lives there; the Constitutional Convention of 1836; Fannin's surrender at Goliad; and the Battle of San Jacinto.

- (4) History. The student understands how individuals, events, and issues shaped the history of the Republic of Texas and early Texas statehood. The student is expected to:
- (A) identify individuals, events, and issues during the administrations of Republic of Texas Presidents Houston, Lamar, and Jones such as the Texas Navy, the Texas Rangers, Jack Coffee Hays, Chief Bowles, William Goyens, Mary Maverick, José Antonio Navarro, the Córdoba Rebellion, the Council House Fight, the Santa Fe Expedition, slavery, and the roles of racial and ethnic groups;
  - (B) analyze the causes of and events leading to Texas annexation such as security and public debt; and
  - (C) identify individuals, events, and issues during early Texas statehood, including the U.S.-Mexican War, the Treaty of Guadalupe-Hidalgo, slavery, and the Compromise of 1850.
- (5) History. The student understands how events and issues shaped the history of Texas during the Civil War and Reconstruction. The student is expected to:
- (A) explain the central role the expansion of slavery played in the involvement of Texas in the Civil War;
  - (B) identify significant events concerning Texas and the Civil War such as the Battle of Galveston, the Battle of Sabine Pass, and the Battle of Palmito Ranch; and
  - (C) explain the political, economic, and social effects of the Civil War and Reconstruction in Texas.
- (6) History. The student understands how individuals, events, and issues shaped the history of Texas from Reconstruction through the beginning of the 20th century. The student is expected to:
- (A) identify significant individuals, events, and issues, including the factors leading to the expansion of the Texas frontier, the effects of westward expansion on American Indians, the buffalo soldiers, and Quanah Parker;
  - (B) identify significant individuals, events, and issues, including the development of the cattle industry from its Spanish beginnings and the cowboy way of life;
  - (C) identify significant individuals, events, and issues, including the effects of the growth of railroads and the contributions of James Hogg; and
  - (D) explain the political, economic, and social impact of the agricultural industry and the development of West Texas resulting from the close of the frontier.
- (7) History. The student understands how individuals, events, and issues shaped the history of Texas during the late 19th, 20th, and early 21st centuries. The student is expected to:
- (A) explain how the oil industry led to the industrialization of Texas;
  - (B) define and trace the impact of "boom-and-bust" cycles of leading Texas industries throughout the 20th and early 21st centuries such as farming, oil and gas production, cotton, ranching, real estate, banking, and computer technology;
  - (C) describe and compare the impact of reform movements in Texas in the 19th and 20th centuries such as progressivism, populism, women's suffrage, agrarianism, labor reform, and the conservative movement of the late 20th century;
  - (D) describe and compare the civil rights and equal rights movements of various groups in Texas in the 20th century and identify key leaders in these movements such as James L. Farmer Jr., Hector P. Garcia, Oveta Culp Hobby, Lyndon B. Johnson, the League of United Latin American Citizens (LULAC), Jane McCallum, and Lulu Belle Madison White; and
  - (E) analyze the political, economic, and social impact of World War I, the Great Depression, World War II, and significant issues in the latter half of the 20th and early 21st centuries

such as political and economic controversies, immigration, and migration on the history of Texas.

- (8) Geography. The student understands the location and characteristics of places and regions of Texas. The student is expected to:
- (A) locate and compare the Mountains and Basins, Great Plains, North Central Plains, and Coastal Plains regions;
  - (B) locate and compare places of importance in Texas in terms of physical and human characteristics such as major cities, waterways, natural and historic landmarks, political and cultural regions, and local points of interest; and
  - (C) analyze the effects of physical and human factors such as climate, weather, landforms, irrigation, transportation, and communication on major events in Texas.
- (9) Geography. The student understands the effects of the interaction between humans and the environment in Texas. The student is expected to:
- (A) identify ways in which Texans have adapted to and modified the environment and explain the positive and negative consequences of the modifications; and
  - (B) explain ways in which geographic factors such as the Galveston Hurricane of 1900, the Dust Bowl, limited water resources, and alternative energy sources have affected the political, economic, and social development of Texas.
- (10) Geography. The student understands the characteristics, distribution, and migration of population in Texas in the 19th, 20th, and 21st centuries. The student is expected to:
- (A) identify why immigrant groups came to Texas and where they settled;
  - (B) describe how immigration and migration to Texas have influenced Texas;
  - (C) describe the structure of the population of Texas using demographic concepts such as growth rate and age distribution; and
  - (D) analyze the effects of the changing population distribution and growth in Texas and the additional need for education, health care, and transportation.
- (11) Economics. The student understands the factors that caused Texas to change from an agrarian to an urban society. The student is expected to:
- (A) explain economic factors and the development of major industries that led to the urbanization of Texas such as transportation, oil and gas, and manufacturing; and
  - (B) explain the changes in the types of jobs and occupations that have resulted from the urbanization of Texas.
- (12) Economics. The student understands the interdependence of the Texas economy with the United States and the world. The student is expected to:
- (A) explain the impact of national and international markets on the production of goods and services in Texas, including agriculture and oil and gas;
  - (B) explain the impact of economic concepts within the free enterprise system such as supply and demand, profit, and world competition on the economy of Texas; and
  - (C) analyze the impact of significant industries in Texas such as aerospace, medical, and computer technologies on local, national, and international markets.
- (13) Government. The student understands the basic principles reflected in the Texas Constitution. The student is expected to:
- (A) identify how the Texas Constitution reflects the principles of limited government, republicanism, checks and balances, federalism, separation of powers, popular sovereignty, and individual rights; and



- (B) compare the principles and concepts of the Texas Constitution to the U.S. Constitution, including the Texas and U.S. Bill of Rights.
- (14) Government. The student understands the structure and functions of government created by the Texas Constitution. The student is expected to:
- (A) describe the structure and functions of government at municipal, county, and state levels; and
  - (B) identify major sources of revenue for state and local governments such as property taxes, sales taxes, bonds, and fees.
- (15) Citizenship. The student understands the rights and responsibilities of Texas citizens in a democratic society. The student is expected to:
- (A) explain rights of Texas citizens; and
  - (B) explain civic responsibilities of Texas citizens and the importance of civic participation.
- (16) Citizenship. The student understands the importance of the expression of different points of view in a democratic society. The student is expected to:
- (A) identify different points of view of political parties and interest groups on important Texas issues, past and present; and
  - (B) describe the importance of free speech and press in a democratic society.
- (17) Citizenship. The student understands the importance of effective leadership in a democratic society. The student is expected to:
- (A) identify the leadership qualities of elected and appointed leaders of Texas, past and present, including Texans who have been president of the United States; and
  - (B) identify the contributions of Texas leaders such as Lawrence Sullivan "Sul" Ross, John Nance Garner ("Cactus Jack"), James A. Baker III, Henry B. González, Kay Bailey Hutchison, Barbara Jordan, Raymond L. Telles, Sam Rayburn, and Raul A. Gonzalez Jr.
- (18) Culture. The student understands the concept of diversity within unity in Texas. The student is expected to:
- (A) explain how the diversity of Texas is reflected in a variety of cultural activities and celebrations;
  - (B) describe how people from various racial, ethnic, and religious groups attempt to maintain their cultural heritage while adapting to the larger Texas culture;
  - (C) identify examples of Spanish influence and the influence of other cultures on Texas such as place names, vocabulary, religion, architecture, food, and the arts; and
  - (D) identify contributions to the arts by Texans such as Roy Bedichek, Diane Gonzales Bertrand, J. Frank Dobie, Scott Joplin, Elisabet Ney, Amado Peña Jr., Walter Prescott Webb, and Horton Foote.
- (19) Science, technology, and society. The student understands the impact of scientific discoveries and technological innovations on the political, economic, and social development of Texas. The student is expected to:
- (A) compare types and uses of technology, past and present;
  - (B) identify Texas leaders in science and technology such as Walter Cunningham, Michael DeBakey, Denton Cooley, Benjy Brooks, Michael Dell, and Howard Hughes Sr.;
  - (C) analyze the effects of various scientific discoveries and technological innovations on the development of Texas such as advancements in the agricultural, energy, medical, computer, and aerospace industries;

- (D) evaluate the effects of scientific discoveries and technological innovations on the use of resources such as fossil fuels, water, and land; and
  - (E) analyze how scientific discoveries and technological innovations have resulted in an interdependence among Texas, the United States, and the world.
- (20) Social studies skills. The student applies critical-thinking skills to organize and use information acquired through established research methodologies from a variety of valid sources, including technology. The student is expected to:
- (A) differentiate between, locate, and use valid primary and secondary sources such as media and news services, biographies, interviews, and artifacts to acquire information about Texas;
  - (B) analyze information by applying absolute and relative chronology through sequencing, categorizing, identifying cause-and-effect relationships, comparing, contrasting, finding the main idea, summarizing, making generalizations and predictions, and drawing inferences and conclusions;
  - (C) organize and interpret information from outlines, reports, databases, and visuals, including graphs, charts, timelines, and maps;
  - (D) identify bias and points of view from the historical context surrounding an event that influenced the participants;
  - ~~(E) formulate and communicate visually, orally, or in writing a claim supported by evidence and reasoning related to a social studies topic; and~~
  - ~~(F) evaluate a variety of historical and contemporary sources for validity, credibility, bias, and accuracy.~~
  - ~~[(E) support a point of view on a social studies issue or event; and]~~
  - ~~[(F) evaluate the validity of a source based on corroboration with other sources and information about the author.]~~
- (21) Social studies skills. The student uses geographic tools to collect, analyze, and interpret data. The student is expected to:
- (A) create and interpret thematic maps, graphs, and charts representing various aspects of Texas during the 19th, 20th, and 21st centuries; and
  - (B) analyze and interpret geographic distributions and patterns in Texas during the 19th, 20th, and 21st centuries.
- (22) Social studies skills. The student communicates in written, oral, and visual forms. The student is expected to:
- (A) use social studies terminology correctly;
  - (B) use effective written communication skills, including proper citations and avoiding plagiarism; ~~and~~
  - (C) create written, oral, and visual presentations of social studies information ; ~~and~~ [ ]
  - ~~(D) apply foundational language skills to engage in civil discourse about social studies topics, including those with multiple perspectives.~~
- (23) Social studies skills. The student uses problem-solving and decision-making skills, working independently and with others. The student is expected to :
- ~~(A) describe governmental and democratic processes such as voting, due process, and caucuses using simulations and models; and~~

- (B) use problem-solving and decision-making processes to identify a problem, gather information, list and consider options, consider advantages and disadvantages, choose and implement a solution, and evaluate the effectiveness of the solution.

**§113.20. Social Studies, Grade 8, Adopted 2022 [~~2018~~] .**

(a) ~~Implementation. The provisions of this section shall be implemented by school districts beginning with the 2024-2025~~ [2025-2026] school year.

~~[(1) No later than July 31, 2024, the commissioner of education shall determine whether instructional materials funding has been made available to Texas public schools for materials that cover the essential knowledge and skills identified in this section.]~~

~~[(2) If the commissioner makes the determination that instructional materials funding has been made available, this section shall be implemented beginning with the 2025-2026 school year and apply to the 2025-2026 and subsequent school years.]~~

~~[(3) If the commissioner does not make the determination that instructional materials funding has been made available under this subsection, the commissioner shall determine no later than August 31 of each subsequent school year whether instructional materials funding has been made available. If the commissioner determines that instructional materials funding has been made available, the commissioner shall notify the State Board of Education and school districts that this section shall be implemented for the following school year.]~~

(b) [~~(a)~~] Introduction.

- (1) In Grade 8, students study the history of the United States from the early colonial period through Reconstruction. The knowledge and skills in subsection (c) [~~(b)~~] of this section comprise the first part of a two-year study of U.S. history. The second part, comprising U.S. history from Reconstruction to the present, is provided in §113.41 of this title (relating to United States History Studies Since 1877 (One Credit), Beginning with School Year 2011-2012). The content in Grade 8 builds upon that from Grade 5 but provides more depth and breadth. Historical content focuses on the political, economic, religious, and social events and issues related to the colonial and revolutionary eras, the creation and ratification of the U.S. Constitution, challenges of the early republic, the Age of Jackson, westward expansion, sectionalism, Civil War, and Reconstruction. Students describe the physical characteristics of the United States and their impact on population distribution and settlement patterns in the past and present. Students analyze the various economic factors that influenced the development of colonial America and the early years of the republic and identify the origins of the free enterprise system. Students examine the American beliefs and principles, including limited government, checks and balances, federalism, separation of powers, and individual rights, reflected in the U.S. Constitution and other historical documents. Students evaluate the impact of Supreme Court cases and major reform movements of the 19th century and examine the rights and responsibilities of citizens of the United States as well as the importance of effective leadership in a constitutional republic. Students evaluate the impact of scientific discoveries and technological innovations on the development of the United States. Students use critical-thinking skills, including the identification of bias in written, oral, and visual material.
- (2) To support the teaching of the essential knowledge and skills, the use of a variety of rich primary and secondary source material such as the complete text of the U.S. Constitution and the Declaration of Independence, landmark cases of the U.S. Supreme Court, biographies, autobiographies, novels, speeches, letters, diaries, poetry, songs, and artworks is encouraged. Motivating resources are available from museums, historical sites, presidential libraries, and local and state preservation societies.
- (3) The eight strands of the essential knowledge and skills for social studies are intended to be integrated for instructional purposes. Skills listed in the social studies skills strand in subsection (c) [~~(b)~~] of this section should be incorporated into the teaching of all essential knowledge and skills for social studies. A greater depth of understanding of complex content material can be attained when integrated social studies content from the various disciplines and critical-thinking skills are taught together. Statements that contain the word "including" reference content that must

be mastered, while those containing the phrase "such as" are intended as possible illustrative examples.

- (4) Students identify the role of the U.S. free enterprise system within the parameters of this course and understand that this system may also be referenced as capitalism or the free market system.
- (5) Throughout social studies in Kindergarten-Grade 12, students build a foundation in history; geography; economics; government; citizenship; culture; science, technology, and society; and social studies skills. The content, as appropriate for the grade level or course, enables students to understand the importance of patriotism, function in a free enterprise society, and appreciate the basic democratic values of our state and nation as referenced in the Texas Education Code (TEC), §28.002(h).
- (6) Students understand that a constitutional republic is a representative form of government whose representatives derive their authority from the consent of the governed, serve for an established tenure, and are sworn to uphold the constitution.
- (7) State and federal laws mandate a variety of celebrations and observances, including Celebrate Freedom Week.
  - (A) Each social studies class shall include, during Celebrate Freedom Week as provided under the TEC, §29.907, or during another full school week as determined by the board of trustees of a school district, appropriate instruction concerning the intent, meaning, and importance of the Declaration of Independence and the U.S. Constitution, including the Bill of Rights, in their historical contexts. The study of the Declaration of Independence must include the study of the relationship of the ideas expressed in that document to subsequent American history, including the relationship of its ideas to the rich diversity of our people as a nation of immigrants, the American Revolution, the formulation of the U.S. Constitution, and the abolitionist movement, which led to the Emancipation Proclamation and the women's suffrage movement.
  - (B) Each school district shall require that, during Celebrate Freedom Week or other week of instruction prescribed under subparagraph (A) of this paragraph, students in Grades 3-12 study and recite the following text from the Declaration of Independence: "We hold these Truths to be self-evident, that all Men are created equal, that they are endowed by their Creator with certain unalienable Rights, that among these are Life, Liberty and the Pursuit of Happiness--That to secure these Rights, Governments are instituted among Men, deriving their just Powers from the Consent of the Governed."
- (8) Students discuss how and whether the actions of U.S. citizens and the local, state, and federal governments have achieved the ideals espoused in the founding documents.

(c) ~~(b)~~ Knowledge and skills.

- (1) History. The student understands traditional historical points of reference in U.S. history through 1877. The student is expected to:
  - (A) identify the major eras in U.S. history through 1877, including colonization, revolution, creation and ratification of the Constitution, early republic, the Age of Jackson, westward expansion, reform movements, sectionalism, Civil War, and Reconstruction, and describe their causes and effects; and
  - (B) explain the significance of the following dates: 1607, founding of Jamestown; 1620, arrival of the Pilgrims and signing of the Mayflower Compact; 1776, adoption of the Declaration of Independence; 1787, writing of the U.S. Constitution; 1803, Louisiana Purchase; and 1861-1865, Civil War.
- (2) History. The student understands the causes of exploration and colonization eras. The student is expected to:
  - (A) identify reasons for English, Spanish, and French exploration and colonization of North America; and

- (B) compare political, economic, religious, and social reasons for the establishment of the 13 English colonies.
- (3) History. The student understands the foundations of representative government in the United States. The student is expected to:
- (A) explain the reasons for the growth of representative government and institutions during the colonial period;
- (B) analyze the importance of the Mayflower Compact, the Fundamental Orders of Connecticut, and the Virginia House of Burgesses to the growth of representative government; and
- (C) describe how religion and virtue contributed to the growth of representative government in the American colonies.
- (4) History. The student understands significant political and economic issues of the revolutionary and Constitutional eras. The student is expected to:
- (A) analyze causes of the American Revolution, including the Proclamation of 1763, the Intolerable Acts, the Stamp Act, mercantilism, lack of representation in Parliament, and British economic policies following the French and Indian War;
- (B) explain the roles played by significant individuals during the American Revolution, including Abigail Adams, John Adams, Wentworth Cheswell, Samuel Adams, Mercy Otis Warren, James Armistead, Benjamin Franklin, Crispus Attucks, King George III, Patrick Henry, Thomas Jefferson, the Marquis de Lafayette, Thomas Paine, and George Washington;
- (C) explain the issues surrounding important events of the American Revolution, including declaring independence; fighting the battles of Lexington and Concord, Saratoga, and Yorktown; enduring the winter at Valley Forge; and signing the Treaty of Paris of 1783; and
- (D) analyze the issues of the Constitutional Convention of 1787, including the Great Compromise and the Three-Fifths Compromise.
- (5) History. The student understands the challenges confronted by the government and its leaders in the early years of the republic and the Age of Jackson. The student is expected to:
- (A) describe major domestic problems faced by the leaders of the new republic, including maintaining national security, creating a stable economic system, and setting up the court system;
- (B) explain the effects of the Fugitive Slave Act of 1793;
- (C) [~~B~~] summarize arguments regarding protective tariffs, taxation, and the banking system;
- (D) [~~C~~] explain the origin and development of American political parties;
- (E) [~~D~~] explain the causes, important events, and effects of the War of 1812;
- (F) [~~E~~] identify the foreign policies of presidents Washington through Monroe and explain the impact of Washington's Farewell Address and the Monroe Doctrine;
- (G) [~~F~~] explain the impact of the election of Andrew Jackson, including expanded suffrage; and
- (H) [~~G~~] analyze the reasons for the removal and resettlement of Cherokee Indians during the Jacksonian era, including the Indian Removal Act, Worcester v. Georgia, and the Trail of Tears.
- (6) History. The student understands westward expansion and its effects on the political, economic, and social development of the nation. The student is expected to:

- (A) explain how the Northwest Ordinance established principles and procedures for orderly expansion of the United States;
  - (B) analyze the westward growth of the nation, including the Louisiana Purchase and Manifest Destiny; and
  - (C) explain the causes and effects of the U.S.-Mexican War and their impact on the United States.
- (7) History. The student understands how political, economic, and social factors led to the growth of sectionalism and the Civil War. The student is expected to:
- (A) analyze the impact of tariff policies on sections of the United States before the Civil War;
  - (B) compare the effects of political, economic, and social factors on slaves and free Blacks [~~blacks~~];
  - (C) analyze the impact of the Fugitive Slave Act of 1850 on slavery, free Blacks, and abolitionists;
  - (D) [~~C~~] analyze the impact of slavery on different sections of the United States; and
  - (E) [~~D~~] identify the provisions and compare the effects of congressional conflicts and compromises prior to the Civil War, including the role of John Quincy Adams.
- (8) History. The student understands individuals, issues, and events of the Civil War. The student is expected to:
- (A) explain the roles played by significant individuals during the Civil War, including Jefferson Davis, Ulysses S. Grant, Robert E. Lee, and Abraham Lincoln, and heroes such as congressional Medal of Honor recipients William Carney and Philip Bazaar;
  - (B) explain the central role of the expansion of slavery in causing sectionalism, disagreement over states' rights, and the Civil War;
  - (C) explain significant events of the Civil War, including the firing on Fort Sumter; the battles of Antietam, Gettysburg, and Vicksburg; the Emancipation Proclamation; Lee's surrender at Appomattox Court House; and the assassination of Abraham Lincoln; and
  - (D) analyze Abraham Lincoln's ideas about liberty, equality, union, and government as contained in his first and second inaugural addresses and the Gettysburg Address and contrast them with the ideas contained in Jefferson Davis's inaugural address.
- (9) History. The student understands the effects of Reconstruction on the political, economic, and social life of the nation. The student is expected to:
- (A) evaluate legislative reform programs of the Radical Reconstruction Congress and reconstructed state governments;
  - (B) explain the impact of the election of African Americans from the South such as Hiram Rhodes Revels; and
  - (C) explain the economic, political, and social problems during Reconstruction and evaluate their impact on different groups.
- (10) Geography. The student understands the location and characteristics of places and regions of the United States, past and present. The student is expected to:
- (A) locate places and regions directly related to major eras and turning points in the United States during the 17th, 18th, and 19th centuries;
  - (B) compare places and regions of the United States in terms of physical and human characteristics; and

- (C) analyze the effects of physical and human geographic factors such as weather, landforms, waterways, transportation, and communication on major historical events in the United States.
- (11) Geography. The student understands the physical characteristics of North America and how humans adapted to and modified the environment through the mid-19th century. The student is expected to:
- (A) analyze how physical characteristics of the environment influenced population distribution, settlement patterns, and economic activities in the United States; and
  - (B) describe the positive and negative consequences of human modification of the physical environment of the United States.
- (12) Economics. The student understands why various sections of the United States developed different patterns of economic activity through 1877. The student is expected to:
- (A) identify economic differences among different regions of the United States;
  - (B) explain reasons for the development of the plantation system, the transatlantic slave trade, and the spread of slavery; and
  - (C) analyze the causes and effects of economic differences among different regions of the United States at selected times.
- (13) Economics. The student understands how various economic forces resulted in the Industrial Revolution in the 19th century. The student is expected to:
- (A) analyze the economic effects of the War of 1812; and
  - (B) identify the economic factors that brought about rapid industrialization and urbanization.
- (14) Economics. The student understands the origins and development of the free enterprise system in the United States. The student is expected to:
- (A) explain why a free enterprise system of economics developed in the new nation, including minimal government regulation, taxation, and property rights; and
  - (B) describe the characteristics and the benefits of the U.S. free enterprise system through 1877.
- (15) Government. The student understands the American beliefs and principles reflected in the Declaration of Independence, the U.S. Constitution, and other important historic documents. The student is expected to:
- (A) identify the influence of ideas from historic documents, including the Magna Carta, the English Bill of Rights, the Mayflower Compact, and the Federalist Papers, on the U.S. system of government;
  - (B) summarize the strengths and weaknesses of the Articles of Confederation;
  - (C) identify colonial grievances listed in the Declaration of Independence and explain how those grievances were addressed in the U.S. Constitution and the Bill of Rights;
  - (D) analyze how the U.S. Constitution reflects the principles of limited government, republicanism, checks and balances, federalism, separation of powers, popular sovereignty, and individual rights; and
  - (E) explain the role of significant individuals such as Thomas Hooker, Charles de Montesquieu, and John Locke in the development of self-government in colonial America.
- (16) Government. The student understands the purpose of changing the U.S. Constitution and the impact of amendments on American society. The student is expected to:
- (A) summarize the purposes for amending the U.S. Constitution; and

- (B) describe the impact of the 13th, 14th, and 15th amendments.
- (17) Government. The student understands the dynamic nature of the powers of the national government and state governments in a federal system. The student is expected to:
- (A) analyze the arguments of the Federalists and Anti-Federalists, including those of Alexander Hamilton, Patrick Henry, James Madison, and George Mason, and explain how their debates exemplify civil discourse; and
- (B) explain constitutional issues arising over the issue of states' rights, including the Nullification Crisis and the Civil War.
- (18) Government. The student understands the impact of landmark Supreme Court cases. The student is expected to:
- (A) identify the origin of judicial review;
- (B) summarize the issues, decisions, and significance of landmark Supreme Court cases, including *Marbury v. Madison*, *McCulloch v. Maryland*, and *Gibbons v. Ogden*; and
- (C) evaluate the impact of the landmark Supreme Court decision *Dred Scott v. Sandford* on life in the United States.
- (19) Citizenship. The student understands the rights and responsibilities of citizens of the United States. The student is expected to:
- (A) define and give examples of unalienable rights;
- (B) summarize rights guaranteed in the Bill of Rights; and
- (C) identify examples of responsible citizenship, including obeying rules and laws, staying informed on public issues, voting, and serving on juries.
- (20) Citizenship. The student understands the importance of voluntary individual participation in the democratic process. The student is expected to:
- (A) evaluate the contributions of the Founding Fathers as models of civic virtue; and
- (B) analyze reasons for and the impact of selected examples of civil disobedience in U.S. history such as the Boston Tea Party and Henry David Thoreau's refusal to pay a tax.
- (21) Citizenship. The student understands the importance of the expression of different points of view in a constitutional republic. The student is expected to:
- (A) identify different points of view of political parties and interest groups on important historical issues;
- (B) describe the importance of free speech and press in a constitutional republic; and
- (C) summarize historical events in which compromise resulted in a resolution such as the Missouri Compromise, Compromise of 1850, and Kansas-Nebraska Act.
- (22) Citizenship. The student understands the importance of effective leadership in a constitutional republic. The student is expected to:
- (A) analyze the leadership qualities of elected and appointed leaders of the United States such as George Washington, John Marshall, and Abraham Lincoln; and
- (B) describe the contributions of significant political, social, and military leaders of the United States such as Frederick Douglass, John Paul Jones, Susan B. Anthony, and Elizabeth Cady Stanton.
- (23) Culture. The student understands the relationships between and among people from various groups, including racial, ethnic, and religious groups, during the 17th, 18th, and 19th centuries. The student is expected to:



- (A) identify racial, ethnic, and religious groups that settled in the United States and explain their reasons for immigration;
  - (B) explain how urbanization contributed to conflicts resulting from differences in religion, social class, and political beliefs;
  - (C) identify ways conflicts between people from various racial, ethnic, and religious groups were addressed;
  - (D) analyze the contributions of people of various racial, ethnic, and religious groups to our national identity; and
  - (E) identify the political, social, and economic contributions of women to American society.
- (24) Culture. The student understands the major reform movements of the 19th century. The student is expected to:
- (A) describe and evaluate the historical development of the abolition [abolitionist] movement including activities that focused attention on the moral ills of slavery ; and
  - (B) evaluate the impact of reform movements, including educational reform, temperance, the women's rights movement, prison reform, the labor reform movement, and care of the disabled.
- (25) Culture. The student understands the impact of religion on the American way of life. The student is expected to:
- (A) trace the development of religious freedom in the United States;
  - (B) describe religious influences on social movements, including the impact of the first and second Great Awakenings; and
  - (C) analyze the impact of the First Amendment guarantees of religious freedom on the American way of life.
- (26) Culture. The student understands the relationship between the arts and the times during which they were created. The student is expected to:
- (A) identify examples of American art, music, and literature that reflect society in different eras such as the Hudson River School artists, the "Battle Hymn of the Republic," and transcendental literature; and
  - (B) analyze the relationship between the arts and continuity and change in the American way of life.
- (27) Science, technology, and society. The student understands the impact of science and technology on the economic development of the United States. The student is expected to:
- (A) explain the effects of technological and scientific innovations such as the steamboat, the cotton gin, the telegraph, and interchangeable parts;
  - (B) analyze how technological innovations changed the way goods were manufactured and distributed, nationally and internationally; and
  - (C) analyze how technological innovations brought about economic growth such as the development of the factory system and the construction of the Transcontinental Railroad.
- (28) Science, technology, and society. The student understands the impact of scientific discoveries and technological innovations on daily life in the United States. The student is expected to:
- (A) compare the effects of scientific discoveries and technological innovations that have influenced daily life in different periods in U.S. history; and
  - (B) identify examples of how industrialization changed life in the United States.

- (29) Social studies skills. The student applies critical-thinking skills to organize and use information acquired through established research methodologies from a variety of valid sources, including technology. The student is expected to:
- (A) differentiate between, locate, and use valid primary and secondary sources such as media and news services, biographies, interviews, and artifacts to acquire information about the United States;
  - (B) analyze information by applying absolute and relative chronology through sequencing, categorizing, identifying cause-and-effect relationships, comparing, contrasting, finding the main idea, summarizing, making generalizations and predictions, and drawing inferences and conclusions;
  - (C) organize and interpret information from outlines, reports, databases, and visuals, including graphs, charts, timelines, and maps;
  - (D) identify bias and points of view created by the historical context surrounding an event;
  - ~~(E) formulate and communicate visually, orally, or in writing a claim supported by evidence and reasoning related to a social studies topic;~~
  - ~~(F) evaluate a variety of historical and contemporary sources for validity, credibility, bias, and accuracy;~~
  - ~~[(E) support a point of view on a social studies issue or event;]~~
  - ~~[(F) evaluate the validity of a source based on corroboration with other sources and information about the author;]~~
  - (G) create a visual representation of historical information such as thematic maps, graphs, and charts representing various aspects of the United States; and
  - (H) pose and answer questions about geographic distributions and patterns shown on maps, graphs, and charts.
- (30) Social studies skills. The student communicates in written, oral, and visual forms. The student is expected to:
- (A) use social studies terminology correctly;
  - (B) use effective written communication skills, including proper citations and avoiding plagiarism; ~~and~~
  - (C) create written, oral, and visual presentations of social studies information ; ~~and~~ [ ]
  - ~~(D) apply foundational language skills to engage in civil discourse about social studies topics, including those with multiple perspectives.~~
- (31) Social studies skills. The student uses problem-solving and decision-making skills, working independently and with others. The student is expected to :
- ~~(A) describe governmental and democratic processes such as voting, due process, and caucuses using simulations and models; and~~
  - ~~(B) use problem-solving and decision-making processes to identify a problem, gather information, list and consider options, consider advantages and disadvantages, choose and implement a solution, and evaluate the effectiveness of the solution.~~

## Chapter 113. Texas Essential Knowledge and Skills for Social Studies

### Subchapter C. High School

#### §113.31. Economics with Emphasis on the Free Enterprise System and Its Benefits, High School (One-Half Credit), Adopted 2022 [~~2018~~].

- (a) ~~Implementation. The provisions of this section shall be implemented by school districts beginning with the 2024-2025 [2025-2026] school year.~~
- ~~[(1) No later than July 31, 2024, the commissioner of education shall determine whether instructional materials funding has been made available to Texas public schools for materials that cover the essential knowledge and skills identified in this section.]~~
- ~~[(2) If the commissioner makes the determination that instructional materials funding has been made available, this section shall be implemented beginning with the 2025-2026 school year and apply to the 2025-2026 and subsequent school years.]~~
- ~~[(3) If the commissioner does not make the determination that instructional materials funding has been made available under this subsection, the commissioner shall determine no later than August 31 of each subsequent school year whether instructional materials funding has been made available. If the commissioner determines that instructional materials funding has been made available, the commissioner shall notify the State Board of Education and school districts that this section shall be implemented for the following school year.]~~
- (b) ~~(a)~~ General requirements. This course will be taught in the social studies department and is recommended to be taught in Grade 12.
- (c) ~~(b)~~ Introduction.
- (1) Economics with Emphasis on the Free Enterprise System and Its Benefits is the culmination of the economic content and concepts studied from Kindergarten through required secondary courses. The focus is on the basic principles concerning production, consumption, and distribution of goods and services (the problem of scarcity) in the United States and a comparison with those in other countries around the world. Students analyze the interaction of supply, demand, and price. Students will investigate the concepts of specialization and international trade, economic growth, key economic measurements, and monetary and fiscal policy. Students will study the roles of the Federal Reserve System and other financial institutions, government, and businesses in a free enterprise system. Types of business ownership and market structures are discussed. The course also incorporates instruction in personal financial literacy. Students apply critical-thinking skills using economic concepts to evaluate the costs and benefits of economic issues.
  - (2) Students identify the role of the U.S. free enterprise system within the parameters of this course and understand that this system may also be referenced as capitalism or the free market system.
  - (3) Economics with Emphasis on the Free Enterprise System and Its Benefits builds upon the foundation in economics and social studies laid by the social studies essential knowledge and skills in Kindergarten-Grade 12. The course will apply these skills to current economic situations. The content enables students to understand the importance of patriotism, function in a free enterprise society, and appreciate the basic democratic values of our state and nation as referenced in the Texas Education Code (TEC), §28.002(h).
  - (4) Students understand that a constitutional republic is a representative form of government whose representatives derive their authority from the consent of the governed, serve for an established tenure, and are sworn to uphold the constitution.
  - (5) As referenced in House Bill 492, an act of the Texas Legislature signed into law in 2005, the concepts of personal financial literacy are to be mastered by students in order that they may become self-supporting adults who can make informed decisions relating to personal financial matters. These concepts are incorporated into the student expectations of Economics with

Emphasis on the Free Enterprise System and Its Benefits: understanding interest, avoiding and eliminating credit card debt; understanding the rights and responsibilities of renting or buying a home; managing money to make the transition from renting a home to home ownership; starting a small business; being a prudent investor in the stock market and using other investment options; beginning a savings program and planning for retirement; bankruptcy; types of bank accounts available to consumers and benefits of maintaining a bank account; balancing a checkbook; types of loans available to consumers and becoming a low-risk borrower; understanding insurance; and charitable giving.

- (6) State and federal laws mandate a variety of celebrations and observances, including Celebrate Freedom Week.
  - (A) Each social studies class shall include, during Celebrate Freedom Week as provided under the TEC, §29.907, or during another full school week as determined by the board of trustees of a school district, appropriate instruction concerning the intent, meaning, and importance of the Declaration of Independence and the U.S. Constitution, including the Bill of Rights, in their historical contexts. The study of the Declaration of Independence must include the study of the relationship of the ideas expressed in that document to subsequent American history, including the relationship of its ideas to the rich diversity of our people as a nation of immigrants, the American Revolution, the formulation of the U.S. Constitution, and the abolitionist movement, which led to the Emancipation Proclamation and the women's suffrage movement.
  - (B) Each school district shall require that, during Celebrate Freedom Week or other week of instruction prescribed under subparagraph (A) of this paragraph, students in Grades 3-12 study and recite the following text from the Declaration of Independence: "We hold these Truths to be self-evident, that all Men are created equal, that they are endowed by their Creator with certain unalienable Rights, that among these are Life, Liberty and the Pursuit of Happiness--That to secure these Rights, Governments are instituted among Men, deriving their just Powers from the Consent of the Governed."
- (7) Students discuss how and whether the actions of U.S. citizens and the local, state, and federal governments have achieved the ideals espoused in the founding documents.

(d) [(e)] Knowledge and skills.

- (1) Economics. The student understands the concepts of scarcity and opportunity costs. The student is expected to:
  - (A) explain why scarcity and choice are basic economic problems faced by every society;
  - (B) describe how societies answer the basic economic questions: what to produce, how to produce, and for whom to produce;
  - (C) describe the economic factors of production: land, labor, capital, and entrepreneurship; and
  - (D) interpret a production-possibilities curve and apply the concepts of opportunity costs and scarcity.
- (2) Economics. The student understands the interaction of supply, demand, and price. The student is expected to:
  - (A) understand the effect of changes in price on the quantity demanded and quantity supplied;
  - (B) identify the non-price determinants that create changes in supply and demand, which result in a new equilibrium price; and
  - (C) interpret a supply-and-demand graph using supply-and-demand schedules.
- (3) Economics. The student understands the reasons for international trade and its importance to the United States and the global economy. The student is expected to:
  - (A) apply the concepts of absolute and comparative advantages;

- (B) compare the effects of free trade and trade barriers on economic activities, including the benefits and costs of participating in international trade; and
  - (C) analyze the effects of changes in exchange rates on imports and exports.
- (4) Economics. The student understands free enterprise, socialist, and communist economic systems. The student is expected to:
- (A) explain the basic characteristics of economic systems, including property rights, incentives, economic freedom, competition, and the role of government;
  - (B) contrast current and historic examples of the free enterprise system, socialism, and communism using the basic characteristics of economic systems; and
  - (C) analyze the contributions of various economic philosophers, including Friedrich Hayek, Milton Friedman, John Maynard Keynes, and Adam Smith, and their impact on the U.S. free enterprise system.
- (5) Economics. The student understands the basic characteristics and benefits of the U.S. free enterprise system. The student is expected to:
- (A) explain the benefits of the U.S. free enterprise system, including individual freedom of consumers and producers, variety of goods, responsive prices, investment opportunities, and the creation of wealth; and
  - (B) analyze recent changes in the basic characteristics, including private property, incentives, economic freedom, competition, and the limited role of government, of the U.S. economy.
- (6) Economics. The student understands the right to own, use, and dispose of private property. The student is expected to:
- (A) analyze the costs and benefits of the purchase, use, or disposal of personal and business property; and
  - (B) identify and evaluate examples of restrictions that the government places on the use of business and individual property.
- (7) Economics. The student understands the circular-flow model of the economy. The student is expected to:
- (A) interpret the roles of resource owners and firms in a circular-flow model of the economy and provide real-world examples to illustrate elements of the model; and
  - (B) explain how government actions affect the circular-flow model.
- (8) Economics. The student understands types of market structures. The student is expected to:
- (A) describe characteristics and give examples of pure competition, monopolistic competition, oligopoly, and monopoly; and
  - (B) identify regulations that apply to the establishment and operation of various types of market structures.
- (9) Economics. The student understands key economic measurements. The student is expected to:
- (A) interpret economic data, including unemployment rate, gross domestic product, gross domestic product per capita as a measure of national wealth, and rate of inflation; and
  - (B) analyze business cycles using key economic indicators.
- (10) Economics. The student understands key components of economic growth. The student is expected to:
- (A) analyze how productivity relates to growth;
  - (B) analyze how technology relates to growth; and

- (C) analyze how trade relates to growth.
- (11) Economics. The student understands the role of money in an economy. The student is expected to:
- (A) describe the functions of money;
  - (B) describe the characteristics of money, including commodity money, fiat money, and representative money; and
  - (C) analyze the positive and negative aspects of barter, currency, and debit cards.
- (12) Economics. The student understands the role of the Federal Reserve System in establishing monetary policy. The student is expected to:
- (A) explain the structure of the Federal Reserve System;
  - (B) analyze the three basic tools used to implement U.S. monetary policy, including reserve requirements, the discount rate and the federal funds rate target, and open-market operations;
  - (C) explain how the actions of the Federal Reserve System affect the nation's money supply; and
  - (D) describe the current role of the U.S. dollar in trade in the world market and analyze how that has changed over time, in particular since departing from the gold standard in 1971.
- (13) Economics. The student understands the role that the government plays in the U.S. free enterprise system. The student is expected to:
- (A) describe the role of government in the U.S. free enterprise system and the changes in that role over time; and
  - (B) analyze the costs and benefits of U.S. economic policies, rules, and regulations related to the economic goals of economic growth, stability, full employment, freedom, security, equity (equal opportunity versus equal outcome), and efficiency.
- (14) Economics. The student understands the economic impact of fiscal policy decisions at the local, state, and national levels. The student is expected to:
- (A) identify types of taxes at the local, state, and national levels and the economic importance of each;
  - (B) explain the categories of revenues and expenditures in the U.S. federal budget; and
  - (C) analyze the impact of fiscal policy decisions on the economy.
- (15) Personal financial literacy. The student understands types of business ownership. The student is expected to:
- (A) explain the characteristics of sole proprietorships, partnerships, and corporations; and
  - (B) analyze the advantages and disadvantages of sole proprietorships, partnerships, and corporations.
- (16) Personal financial literacy. The student understands the role of financial markets/institutions in saving, borrowing, and capital formation. The student is expected to:
- (A) explain the functions of financial institutions and how they affect households and businesses;
  - (B) explain how the amount of savings in an economy is the basis of capital formation;
  - (C) analyze the role of interest and risk in allocating savings to its most productive use; and
  - (D) examine the types of accounts available to consumers from financial institutions and the risks, monetary costs, and benefits of maintaining these accounts.

- (17) Personal financial literacy. The student understands the role of individuals in financial markets. The student is expected to:
- (A) assess ways to be a wise investor in the stock market and in other personal investment options such as developing a personal retirement plan;
  - (B) explain how to begin a savings program;
  - (C) demonstrate how to maintain a checking account, including reconciling a bank statement;
  - (D) identify the types of loans available to consumers;
  - (E) explain the responsibilities and obligations of borrowing money; and
  - (F) develop strategies to become a low-risk borrower by improving and understanding one's personal credit score.
- (18) Personal financial literacy. The student applies critical-thinking skills to analyze the costs and benefits of personal financial decisions. The student is expected to:
- (A) examine ways to avoid and eliminate credit card debt;
  - (B) evaluate the costs and benefits of declaring personal bankruptcy;
  - (C) evaluate the costs and benefits of buying insurance; and
  - (D) evaluate the costs and benefits of charitable giving.
- (19) Personal financial literacy. The student understands how to provide for basic needs while living within a budget. The student is expected to:
- (A) evaluate the costs and benefits of renting a home versus buying a home; and
  - (B) assess the financial aspects of making the transition from renting to home ownership.
- (20) Personal financial literacy. The student understands the various methods available to pay for college and other postsecondary education and training. The student is expected to:
- (A) understand how to complete the Free Application for Federal Student Aid (FAFSA) provided by the United States Department of Education;
  - (B) research and evaluate various scholarship opportunities such as those from state governments, schools, employers, individuals, private companies, nonprofits, and professional organizations;
  - (C) analyze and compare student grant options;
  - (D) analyze and compare student loan options, including private and federal loans; and
  - (E) research and evaluate various work-study program opportunities.
- (21) Social studies skills. The student applies critical-thinking skills to organize and use information acquired through established research methodologies from a variety of valid sources, including technology. The student is expected to:
- (A) analyze economic information by sequencing, categorizing, identifying cause-and-effect relationships, comparing, contrasting, finding the main idea, summarizing, making generalizations and predictions, and drawing inferences and conclusions;
  - (B) create economic models, including production-possibilities curves, circular-flow charts, and supply-and-demand graphs, to analyze economic concepts or issues;
  - (C) explain a point of view on an economic issue;
  - (D) analyze and evaluate a variety ~~[the validity]~~ of economic information from primary and secondary sources for validity, credibility, accuracy, bias, propaganda, point of view, and frame of reference; ~~[and]~~

- (E) evaluate economic data using charts, tables, graphs, and maps ; and [2]
  - (F) formulate and communicate visually, orally, or in writing a claim supported by evidence and reasoning for an intended audience and purpose.
- (22) Social studies skills. The student communicates in written, oral, and visual forms. The student is expected to:
- (A) use social studies terminology correctly; [~~and~~]
  - (B) create written, oral, and visual presentations of economic information using effective communication skills, including proper citations and avoiding plagiarism ; and [2]
  - (C) apply foundational language skills to engage in civil discourse about economics topics, including those with multiple perspectives.
- (23) Social studies skills. The student uses problem-solving and decision-making skills, working independently and with others. The student is expected to use problem-solving and decision-making processes to identify a problem, gather information, list and consider options, consider advantages and disadvantages, choose and implement a solution, and evaluate the effectiveness of the solution.

**§113.41. United States History Studies Since 1877 (One Credit), Adopted 2022 [~~2018~~] .**

(a) Implementation. The provisions of this section shall be implemented by school districts beginning with the 2024-2025 [~~2025-2026~~] school year.

~~[(1) No later than July 31, 2024, the commissioner of education shall determine whether instructional materials funding has been made available to Texas public schools for materials that cover the essential knowledge and skills identified in this section.]~~

~~[(2) If the commissioner makes the determination that instructional materials funding has been made available, this section shall be implemented beginning with the 2025-2026 school year and apply to the 2025-2026 and subsequent school years.]~~

~~[(3) If the commissioner does not make the determination that instructional materials funding has been made available under this subsection, the commissioner shall determine no later than August 31 of each subsequent school year whether instructional materials funding has been made available. If the commissioner determines that instructional materials funding has been made available, the commissioner shall notify the State Board of Education and school districts that this section shall be implemented for the following school year.]~~

(b) [~~(a)~~] General requirements. Students shall be awarded one unit of credit for successful completion of this course.

(c) [~~(b)~~] Introduction.

- (1) In United States History Studies Since 1877, which is the second part of a two-year study that begins in Grade 8, students study the history of the United States from 1877 to the present. The course content is based on the founding documents of the U.S. government, which provide a framework for its heritage. Historical content focuses on the political, economic, and social events and issues related to industrialization and urbanization, major wars, domestic and foreign policies, and reform movements, including civil rights. Students examine the impact of geographic factors on major events and eras and analyze their causes and effects. Students examine the impact of constitutional issues on American society, evaluate the dynamic relationship of the three branches of the federal government, and analyze efforts to expand the democratic process. Students describe the relationship between the arts and popular culture and the times during which they were created. Students analyze the impact of technological innovations on American life. Students use critical-thinking skills and a variety of primary and secondary source material to explain and apply different methods that historians use to understand and interpret the past, including multiple points of view and historical context.
- (2) To support the teaching of the essential knowledge and skills, the use of a variety of rich primary and secondary source material such as biographies, autobiographies, landmark cases of the U.S.



Supreme Court, novels, speeches, letters, diaries, poetry, songs, and artworks is encouraged. Motivating resources are available from museums, historical sites, presidential libraries, and local and state preservation societies.

- (3) The eight strands of the essential knowledge and skills for social studies are intended to be integrated for instructional purposes. Skills listed in the social studies skills strand in subsection (d) [~~(e)~~] of this section should be incorporated into the teaching of all essential knowledge and skills for social studies. A greater depth of understanding of complex content material can be attained when integrated social studies content from the various disciplines and critical-thinking skills are taught together. Statements that contain the word "including" reference content that must be mastered, while those containing the phrase "such as" are intended as possible illustrative examples.
- (4) Students identify the role of the U.S. free enterprise system within the parameters of this course and understand that this system may also be referenced as capitalism or the free market system.
- (5) Throughout social studies in Kindergarten-Grade 12, students build a foundation in history; geography; economics; government; citizenship; culture; science, technology, and society; and social studies skills. The content, as appropriate for the grade level or course, enables students to understand the importance of patriotism, function in a free enterprise society, and appreciate the basic democratic values of our state and nation as referenced in the Texas Education Code (TEC), §28.002(h).
- (6) Students understand that a constitutional republic is a representative form of government whose representatives derive their authority from the consent of the governed, serve for an established tenure, and are sworn to uphold the constitution.
- (7) State and federal laws mandate a variety of celebrations and observances, including Celebrate Freedom Week.
  - (A) Each social studies class shall include, during Celebrate Freedom Week as provided under the TEC, §29.907, or during another full school week as determined by the board of trustees of a school district, appropriate instruction concerning the intent, meaning, and importance of the Declaration of Independence and the U.S. Constitution, including the Bill of Rights, in their historical contexts. The study of the Declaration of Independence must include the study of the relationship of the ideas expressed in that document to subsequent American history, including the relationship of its ideas to the rich diversity of our people as a nation of immigrants, the American Revolution, the formulation of the U.S. Constitution, and the abolitionist movement, which led to the Emancipation Proclamation and the women's suffrage movement.
  - (B) Each school district shall require that, during Celebrate Freedom Week or other week of instruction prescribed under subparagraph (A) of this paragraph, students in Grades 3-12 study and recite the following text from the Declaration of Independence: "We hold these Truths to be self-evident, that all Men are created equal, that they are endowed by their Creator with certain unalienable Rights, that among these are Life, Liberty and the Pursuit of Happiness--That to secure these Rights, Governments are instituted among Men, deriving their just Powers from the Consent of the Governed."
- (8) Students discuss how and whether the actions of U.S. citizens and the local, state, and federal governments have achieved the ideals espoused in the founding documents.

(d) [~~(e)~~] Knowledge and skills.

- (1) History. The student understands the principles included in the Celebrate Freedom Week program. The student is expected to:
  - (A) analyze and evaluate the text, intent, meaning, and importance of the Declaration of Independence and the U.S. Constitution, including the Bill of Rights;
  - (B) analyze and evaluate the application of these founding principles to historical events in U.S. history; and

- (C) explain the meaning and historical significance of the mottos "E Pluribus Unum" and "In God We Trust."
- (2) History. The student understands traditional historical points of reference in U.S. history from 1877 to the present. The student is expected to:
- (A) identify the major eras in U.S. history from 1877 to the present and describe their defining characteristics; and
  - (B) explain the significance of the following years as turning points: 1898 (Spanish-American War), 1914-1918 (World War I), 1929 (the Great Depression begins), 1939-1945 (World War II), 1957 (Sputnik launch ignites U.S.-Soviet space race), 1968 (Martin Luther King Jr. assassination), 1969 (U.S. lands on the moon), 1991 (Cold War ends), 2001 (terrorist attacks on World Trade Center and the Pentagon), and 2008 (election of first black president, Barack Obama).
- (3) History. The student understands the political, economic, and social changes in the United States from 1877 to 1898. The student is expected to:
- (A) analyze political issues such as Indian policies, the growth of political machines, and civil service reform;
  - (B) analyze economic issues such as industrialization, the growth of railroads, the growth of labor unions, farm issues, the cattle industry boom, the growth of entrepreneurship, and the pros and cons of big business; and
  - (C) analyze social issues affecting women, minorities, children, immigrants, and urbanization.
- (4) History. The student understands the emergence of the United States as a world power between 1898 and 1920. The student is expected to:
- (A) explain why significant events, policies, and individuals, including the Spanish-American War, U.S. expansionism, Alfred Thayer Mahan, Theodore Roosevelt, and Sanford B. Dole moved the United States into the position of a world power;
  - (B) evaluate American expansionism, including acquisitions such as Guam, Hawaii, the Philippines, and Puerto Rico;
  - (C) identify the causes of World War I and reasons for U.S. entry;
  - (D) understand the contributions of the American Expeditionary Forces (AEF) led by General John J. Pershing, including the Battle of Argonne Forest;
  - (E) analyze the impact of machine guns, airplanes, tanks, poison gas, and trench warfare as significant technological innovations in World War I on the Western Front; and
  - (F) analyze major issues raised by U.S. involvement in World War I, including isolationism, neutrality, Woodrow Wilson's Fourteen Points, and the Treaty of Versailles.
- (5) History. The student understands the effects of reform and third-party movements in the early 20th century. The student is expected to:
- (A) analyze the impact of Progressive Era reforms, including initiative, referendum, recall, and the passage of the 16th, 17th, 18th, and 19th amendments;
  - (B) evaluate the impact of muckrakers and reform leaders such as Upton Sinclair, Susan B. Anthony, Jane Addams, Ida B. Wells, and W. E. B. DuBois on American society; and
  - (C) analyze the impact of third parties, including the Populist and Progressive parties.
- (6) History. The student understands significant events, social issues, and individuals of the 1920s. The student is expected to:

- (A) analyze causes and effects of events and social issues such as immigration, Social Darwinism, the Scopes Trial, eugenics, race relations, nativism, the Red Scare, Prohibition, and the changing role of women; and
  - (B) analyze the impact of significant individuals such as Henry Ford, Marcus Garvey, and Charles A. Lindbergh.
- (7) History. The student understands the domestic and international impact of U.S. participation in World War II. The student is expected to:
- (A) identify reasons for U.S. involvement in World War II, including the aggression of Italian, German, and Japanese dictatorships, especially the attack on Pearl Harbor;
  - (B) evaluate the domestic and international leadership of Franklin D. Roosevelt and Harry Truman during World War II, including the U.S. relationship with its allies;
  - (C) analyze major issues of World War II, including the Holocaust, the internment of Japanese Americans as a result of Executive Order 9066, and the development of atomic weapons;
  - (D) analyze major military events of World War II, including fighting the war on multiple fronts, the Bataan Death March, the U.S. military advancement through the Pacific Islands, the Battle of Midway, the invasion of Normandy, and the liberation of concentration camps;
  - (E) describe the military contributions of leaders during World War II, including Dwight Eisenhower, Douglas MacArthur, and Chester W. Nimitz;
  - (F) explain issues affecting the home front, including volunteerism, the purchase of war bonds, and Victory Gardens and opportunities and obstacles for women and ethnic minorities; and
  - (G) explain how American patriotism inspired high levels of military enlistment and the bravery and contributions of the Tuskegee Airmen, the Flying Tigers, and the Navajo Code Talkers.
- (8) History. The student understands the impact of significant national and international decisions and conflicts in the Cold War on the United States. The student is expected to:
- (A) describe U.S. responses to Soviet aggression after World War II, including the Truman Doctrine, the Marshall Plan, the Berlin Airlift, the North Atlantic Treaty Organization, and John F. Kennedy's role in the Cuban Missile Crisis;
  - (B) describe how Cold War tensions were intensified by the House Un-American Activities Committee (HUAC), McCarthyism, the arms race, and the space race;
  - (C) explain reasons and outcomes for U.S. involvement in the Korean War and its relationship to the containment policy;
  - (D) explain reasons and outcomes for U.S. involvement in foreign countries and their relationship to the Domino Theory, including the Vietnam War;
  - (E) analyze the major events of the Vietnam War, including the escalation of forces, the Tet Offensive, Vietnamization, and the fall of Saigon; and
  - (F) describe the responses to the Vietnam War, including [such as] the draft, the 26th Amendment, the role of the media, the credibility gap, the silent majority, and the anti-war movement.
- (9) History. The student understands the impact of the American civil rights movement. The student is expected to:
- (A) trace the historical development of the civil rights movement from the late 1800s through the 21st century, including the 13th, 14th, 15th, and 19th amendments;

- (B) explain how Jim Crow laws and the Ku Klux Klan created obstacles to civil rights for minorities such as the suppression of voting;
  - (C) describe the roles of political organizations that promoted African American, Chicano, American Indian, and women's civil rights;
  - (D) identify the roles of significant leaders who supported various rights movements, including Martin Luther King Jr., Cesar Chavez, Dolores Huerta, Rosa Parks, and Betty Friedan;
  - (E) compare and contrast the approach taken by the Black Panthers with the nonviolent approach of Martin Luther King Jr.;
  - (F) discuss the impact of the writings of Martin Luther King Jr. , including ~~[such as]~~ his "I Have a Dream" speech and "Letter from Birmingham Jail" on the civil rights movement;
  - (G) describe presidential actions and congressional votes to address minority rights in the United States, including desegregation of the armed forces, the Civil Rights Act of 1964, and the Voting Rights Act of 1965;
  - (H) explain how George Wallace, Orval Faubus, and the Congressional bloc of southern Democrats sought to maintain the status quo;
  - (I) evaluate changes in the United States that have resulted from the civil rights movement, including increased participation of minorities in the political process; and
  - (J) describe how Sweatt v. Painter and Brown v. Board of Education played a role in protecting the rights of the minority during the civil rights movement.
- (10) History. The student understands the impact of political, economic, and social factors in the U.S. from the 1970s through 1990. The student is expected to:
- (A) describe Richard M. Nixon's leadership in the normalization of relations with China and the policy of détente;
  - (B) describe Ronald Reagan's leadership in domestic and international policies, including Reagan's economic policies and Peace Through Strength;
  - (C) describe U.S. involvement in the Middle East such as support for Israel, the Camp David Accords, the Iran Hostage Crisis, Marines in Lebanon, and the Iran-Contra Affair;
  - (D) describe the causes and key organizations of the conservative resurgence of the 1980s such as the Heritage Foundation and the Moral Majority; and
  - (E) describe significant societal issues of this time period such as the War on Drugs and the AIDS epidemic.
- (11) History. The student understands the emerging political, economic, and social issues of the United States from the 1990s into the 21st century. The student is expected to:
- (A) describe U.S. involvement in world affairs, including the end of the Cold War, the Persian Gulf War, the events surrounding September 11, 2001, and the global War on Terror;
  - (B) identify significant social and political issues such as health care, immigration, and education from different viewpoints across the political spectrum;
  - (C) analyze the impact of third parties on the 1992 and 2000 presidential elections; and
  - (D) identify the impact of international events, multinational corporations, government policies, and individuals on the 21st century economy.
- (12) Geography. The student understands the impact of geographic factors on major events. The student is expected to analyze the impact of physical and human geographic factors on the

Klondike Gold Rush, the Panama Canal, the Dust Bowl, and the levee failure in New Orleans after Hurricane Katrina.

- (13) Geography. The student understands the causes and effects of migration and immigration on American society. The student is expected to:
- (A) analyze the causes and effects of changing demographic patterns resulting from migration within the United States, including western expansion, rural to urban, the Great Migration, and the Rust Belt to the Sun Belt; and
  - (B) analyze the causes and effects of changing demographic patterns resulting from immigration to the United States.
- (14) Geography. The student understands the relationship between population growth and the physical environment. The student is expected to:
- (A) identify the effects of population growth and distribution on the physical environment; and
  - (B) identify the roles of governmental entities and private citizens in managing the environment such as the establishment of the National Park System, the Environmental Protection Agency (EPA), and the Endangered Species Act.
- (15) Economics. The student understands domestic and foreign issues related to U.S. economic growth from the 1870s to 1920. The student is expected to:
- (A) describe how the economic impact of the Transcontinental Railroad and the Homestead Act contributed to the close of the frontier in the late 19th century;
  - (B) describe the changing relationship between the federal government and private business, including the growth of free enterprise, costs and benefits of laissez-faire, Sherman Antitrust Act, Interstate Commerce Act, and Pure Food and Drug Act;
  - (C) explain how foreign policies affected economic issues such as the Chinese Exclusion Act of 1882, the Open Door Policy, Dollar Diplomacy, and immigration quotas; and
  - (D) describe the economic effects of international military conflicts, including the Spanish-American War and World War I, on the United States.
- (16) Economics. The student understands significant economic developments between World War I and World War II. The student is expected to:
- (A) analyze causes of economic growth and prosperity in the 1920s, including Warren Harding's Return to Normalcy, reduced taxes, and increased production efficiencies;
  - (B) identify the causes of the Great Depression, including the impact of tariffs on world trade, stock market speculation, bank failures, and the monetary policy of the Federal Reserve System;
  - (C) analyze the effects of the Great Depression on the U.S. economy and society such as widespread unemployment and deportation and repatriation of people of Mexican heritage;
  - (D) compare the New Deal policies and its opponents' approaches to resolving the economic effects of the Great Depression; and
  - (E) describe how various New Deal agencies and programs, including the Federal Deposit Insurance Corporation, the Securities and Exchange Commission, and the Social Security Administration, continue to affect the lives of U.S. citizens.
- (17) Economics. The student understands the economic effects of government policies from World War II through the present. The student is expected to:

- (A) describe the economic effects of World War II on the home front such as mobilization, the end of the Great Depression, rationing, and increased opportunity for women and minority employment;
  - (B) identify the causes of prosperity in the 1950s, including the Baby Boom and the impact of the GI Bill (Servicemen's Readjustment Act of 1944), and the effects of prosperity in the 1950s such as increased consumption and the growth of agriculture and business;
  - (C) describe the economic impact of defense spending on the business cycle and education priorities from 1945 to the 1990s;
  - (D) identify the actions and outcomes of government policies intended to create economic opportunities for citizens such as the Great Society, affirmative action, and Title IX; and
  - (E) describe the dynamic relationship between U.S. international trade policies and the U.S. free enterprise system such as the Organization of Petroleum Exporting Countries (OPEC) oil embargo, the General Agreement on Tariffs and Trade (GATT), and the North American Free Trade Agreement (NAFTA).
- (18) Government. The student understands changes over time in the role of government. The student is expected to:
- (A) evaluate the impact of New Deal legislation on the historical roles of state and federal government;
  - (B) explain constitutional issues raised by federal government policy changes during times of significant events, including World War I, the Great Depression, World War II, the 1960s, and September 11, 2001;
  - (C) describe the effects of political scandals, including Teapot Dome, Watergate, and Bill Clinton's impeachment, on the views of U.S. citizens concerning trust in the federal government and its leaders; and
  - (D) describe the role of contemporary government legislation in the private and public sectors such as the Community Reinvestment Act of 1977, USA PATRIOT Act of 2001, and the American Recovery and Reinvestment Act of 2009.
- (19) Government. The student understands the changing relationships among the three branches of the federal government. The student is expected to:
- (A) describe the impact of events such as the Gulf of Tonkin Resolution and the War Powers Act on the relationship between the legislative and executive branches of government; and
  - (B) evaluate the impact of relationships among the legislative, executive, and judicial branches of government, including Franklin D. Roosevelt's attempt to increase the number of U.S. Supreme Court justices and the presidential election of 2000.
- (20) Government. The student understands the impact of constitutional issues on American society. The student is expected to:
- (A) analyze the effects of landmark U.S. Supreme Court decisions, including Plessy v. Ferguson, Brown v. Board of Education, Hernandez v. Texas, Tinker v. Des Moines, and Wisconsin v. Yoder; and
  - (B) explain why landmark constitutional amendments have been proposed and ratified from 1877 to the present.
- (21) Citizenship. The student understands the concept of American exceptionalism as identified by Alexis de Tocqueville. The student is expected to:
- (A) discuss values crucial to America's success as a constitutional republic, including liberty, egalitarianism, individualism, populism, and laissez-faire; and

- (B) describe how American values are different and unique from those of other nations.
- (22) Citizenship. The student understands the promises of the Declaration of Independence and the protections of the U.S. Constitution and the Bill of Rights. The student is expected to:
- (A) identify and analyze methods of expanding the right to participate in the democratic process, including lobbying, non-violent protesting, litigation, and amendments to the U.S. Constitution;
- (B) evaluate various means of achieving equality of political rights, including the 19th, 24th, and 26th amendments and congressional acts such as the American Indian Citizenship Act of 1924;
- (C) explain how participation in the democratic process reflects our national identity, patriotism, and civic responsibility; and
- (D) summarize the criteria and explain the process for becoming a naturalized citizen of the United States.
- (23) Citizenship. The student understands the importance of effective leadership in a constitutional republic. The student is expected to:
- (A) evaluate the contributions of significant political and social leaders in the United States such as Andrew Carnegie, Thurgood Marshall, Billy Graham, Sandra Day O'Connor, and Hillary Clinton; and
- (B) explain the importance of Congressional Medal of Honor recipients such as Army First Lieutenant Vernon J. Baker, Army Corporal Alvin York, and Army Master Sergeant Raul "Roy" Perez Benavidez.
- (24) Culture. The student understands the relationship between the arts and the times during which they were created. The student is expected to:
- (A) describe how the characteristics of and issues in U.S. history have been reflected in various genres of art, music, film, and literature;
- (B) describe the impacts of cultural movements in art, music, and literature such as Tin Pan Alley, the Harlem Renaissance, the Beat Generation, rock and roll, the Chicano Mural Movement, and country and western music on American society; and
- (C) identify and analyze the global diffusion of American culture through various media.
- (25) Culture. The student understands how people from various groups contribute to our national identity. The student is expected to:
- (A) explain actions taken by people to expand economic opportunities and political rights for racial, ethnic, gender, and religious groups in American society;
- (B) describe the Americanization movement to assimilate immigrants and American Indians into American culture;
- (C) explain how the contributions of people of various racial, ethnic, gender, and religious groups shape American culture; and
- (D) identify the contributions of women such as Rosa Parks, Eleanor Roosevelt, and Sonia Sotomayor to American society.
- (26) Science, technology, and society. The student understands the impact of science, technology, and the free enterprise system on the economic development of the United States. The student is expected to:
- (A) explain the effects of scientific discoveries and technological innovations such as electric power, telephone and satellite communications, petroleum-based products, steel production, and computers on the economic development of the United States;

- (B) explain how specific needs result in scientific discoveries and technological innovations in agriculture, the military, and medicine; and
  - (C) describe the effect of technological innovations in the workplace such as assembly line manufacturing and robotics.
- (27) Science, technology, and society. The student understands the influence of scientific discoveries, technological innovations, and the free enterprise system on the standard of living in the United States. The student is expected to:
- (A) analyze how scientific discoveries, technological innovations, space exploration, and the application of these by the free enterprise system improve the standard of living in the United States, including changes in transportation and communication; and
  - (B) describe how the free enterprise system drives technological innovation and its application in the marketplace such as cell phones, inexpensive personal computers, and global positioning products.
- (28) Social studies skills. The student understands how historians use historiography to interpret the past and applies critical-thinking skills to organize and use information acquired from a variety of valid sources, including technology. The student is expected to:
- (A) analyze primary and secondary sources such as maps, graphs, speeches, political cartoons, and artifacts to acquire information to answer historical questions;
  - (B) analyze information by applying absolute and relative chronology through sequencing, categorizing, identifying cause-and-effect relationships, comparing and contrasting, finding the main idea, summarizing, making generalizations, making predictions, drawing inferences, and drawing conclusions;
  - (C) apply the process of historical inquiry to research, interpret, and use multiple types of sources of evidence;
  - (D) evaluate a variety of historical and contemporary sources for validity, credibility, bias, and accuracy;
  - ~~[(D) — evaluate the validity of a source based on corroboration with other sources and information about the author, including points of view, frames of reference, and historical context; and]~~
  - (E) identify bias and support with historical evidence a point of view on a social studies issue or event ; and [ ]
  - (F) formulate and communicate visually, orally, or in writing a claim supported by evidence and reasoning for an intended audience and purpose.
- (29) Social studies skills. The student communicates in written, oral, and visual forms. The student is expected to:
- (A) create written, oral, and visual presentations of social studies information using effective communication skills, including proper citations and avoiding plagiarism; [and]
  - (B) use social studies terminology correctly ; and [ ]
  - (C) apply foundational language skills to engage in civil discourse about social studies topics, including those with multiple perspectives.
- (30) Social studies skills. The student uses geographic tools to collect, analyze, and interpret data. The student is expected to:
- (A) create a visual representation of historical information such as thematic maps, graphs, and charts; and
  - (B) pose and answer questions about geographic distributions and patterns shown on maps, graphs, charts, and available databases.



- (31) Social studies skills. The student uses problem-solving and decision-making skills, working independently and with others. The student is expected to :
- (A) explain governmental and democratic processes such as voting, due process, and caucuses using simulations and models; and
  - (B) use problem-solving and decision-making processes to identify a problem, gather information, list and consider options, consider advantages and disadvantages, choose and implement a solution, and evaluate the effectiveness of the solution.

**§113.42. World History Studies (One Credit), Adopted 2022 [~~2018~~] .**

(a) Implementation. The provisions of this section shall be implemented by school districts beginning with the 2024-2025 [~~2025-2026~~] school year.

~~[(1) No later than July 31, 2024, the commissioner of education shall determine whether instructional materials funding has been made available to Texas public schools for materials that cover the essential knowledge and skills identified in this section.]~~

~~[(2) If the commissioner makes the determination that instructional materials funding has been made available, this section shall be implemented beginning with the 2025-2026 school year and apply to the 2025-2026 and subsequent school years.]~~

~~[(3) If the commissioner does not make the determination that instructional materials funding has been made available under this subsection, the commissioner shall determine no later than August 31 of each subsequent school year whether instructional materials funding has been made available. If the commissioner determines that instructional materials funding has been made available, the commissioner shall notify the State Board of Education and school districts that this section shall be implemented for the following school year.]~~

(b) ~~[(a)]~~ General requirements. Students shall be awarded one unit of credit for successful completion of this course.

(c) ~~[(b)]~~ Introduction.

- (1) World History Studies is a survey of the history of humankind. Due to the expanse of world history and the time limitations of the school year, the scope of this course should focus on "essential" concepts and skills that can be applied to various eras, events, and people within the standards in subsection (d) ~~[(e)]~~ of this section. The major emphasis is on the study of significant people, events, and issues from the earliest times to the present. Traditional historical points of reference in world history are identified as students analyze important events and issues in western civilization as well as in civilizations in other parts of the world. Students evaluate the causes and effects of political and economic imperialism and of major political revolutions since the 17th century. Students examine the impact of geographic factors on major historic events and identify the historic origins of contemporary economic systems. Students analyze the process by which constitutional governments evolved as well as the ideas from historic documents that influenced that process. Students trace the historical development of important legal and political concepts. Students examine the history and impact of major religious and philosophical traditions. Students analyze the connections between major developments in science and technology and the growth of industrial economies, and they use the process of historical inquiry to research, interpret, and use multiple sources of evidence.
- (2) The following periodization should serve as the framework for the organization of this course: 8000 BC-500 BC (Development of River Valley Civilizations); 500 BC-AD 600 (Classical Era); 600-1450 (Post-classical Era); 1450-1750 (Connecting Hemispheres); 1750-1914 (Age of Revolutions); and 1914-present (20th Century to the Present). Specific events and processes may transcend these chronological boundaries.
- (3) To support the teaching of the essential knowledge and skills, the use of a variety of rich primary and secondary source material such as state papers, legal documents, charters, constitutions, biographies, autobiographies, speeches, letters, literature, music, art, and architecture is encouraged. Motivating resources are available from museums, art galleries, and historical sites.

- (4) The eight strands of the essential knowledge and skills for social studies are intended to be integrated for instructional purposes. Skills listed in the social studies skills strand in subsection (d) ~~[(e)]~~ of this section should be incorporated into the teaching of all essential knowledge and skills for social studies.
- (5) A greater depth of understanding of complex content material can be attained by integrating social studies content and skills and by analyzing connections between and among historical periods and events. The list of events and people in this course curriculum should not be considered exhaustive. Additional examples can and should be incorporated. Statements that contain the word "including" reference content that must be mastered, while those containing the phrase "such as" are intended as possible illustrative examples.
- (6) Students identify the role of the U.S. free enterprise system within the parameters of this course and understand that this system may also be referenced as capitalism or the free market system.
- (7) Throughout social studies in Kindergarten-Grade 12, students build a foundation in history; geography; economics; government; citizenship; culture; science, technology, and society; and social studies skills. The content, as appropriate for the grade level or course, enables students to understand the importance of patriotism, function in a free enterprise society, and appreciate the basic democratic values of our state and nation, as referenced in the Texas Education Code (TEC), §28.002(h).
- (8) Students understand that a constitutional republic is a representative form of government whose representatives derive their authority from the consent of the governed, serve for an established tenure, and are sworn to uphold the constitution.
- (9) State and federal laws mandate a variety of celebrations and observances, including Celebrate Freedom Week.
  - (A) Each social studies class shall include, during Celebrate Freedom Week as provided under the TEC, §29.907, or during another full school week as determined by the board of trustees of a school district, appropriate instruction concerning the intent, meaning, and importance of the Declaration of Independence and the U.S. Constitution, including the Bill of Rights, in their historical contexts. The study of the Declaration of Independence must include the study of the relationship of the ideas expressed in that document to subsequent American history, including the relationship of its ideas to the rich diversity of our people as a nation of immigrants, the American Revolution, the formulation of the U.S. Constitution, and the abolitionist movement, which led to the Emancipation Proclamation and the women's suffrage movement.
  - (B) Each school district shall require that, during Celebrate Freedom Week or other week of instruction prescribed under subparagraph (A) of this paragraph, students in Grades 3-12 study and recite the following text from the Declaration of Independence: "We hold these Truths to be self-evident, that all Men are created equal, that they are endowed by their Creator with certain unalienable Rights, that among these are Life, Liberty and the Pursuit of Happiness--That to secure these Rights, Governments are instituted among Men, deriving their just Powers from the Consent of the Governed."
- (10) Students discuss how and whether the actions of U.S. citizens and the local, state, and federal governments have achieved the ideals espoused in the founding documents.

(d) ~~[(e)]~~ Knowledge and skills.

- (1) History. The student understands traditional historical points of reference in world history. The student is expected to:
  - (A) identify major causes and describe the major effects of the following events from 8000 BC to 500 BC: the development of agriculture and the development of the river valley civilizations;
  - (B) identify major causes and describe the major effects of the following events from 500 BC to AD 600: the development of the classical civilizations of Greece, Rome, Persia, India

- (Maurya and Gupta), China (Zhou, Qin, and Han), and the development of major world religions;
- (C) identify major causes and describe the major effects of the following important turning points in world history from 600 to 1450: the spread of major world religions and their impact on Asia, Africa, and Europe and the Mongol invasions and their impact on Europe, China, India, and Southwest Asia;
  - (D) identify major causes and describe the major effects of the following important turning points in world history from 1450 to 1750: the rise of the Ottoman Empire, the influence of the Ming dynasty on world trade, European exploration and the Columbian Exchange, European expansion, and the Renaissance and the Reformation;
  - (E) identify major causes and describe the major effects of the following important turning points in world history from 1750 to 1914: the Scientific Revolution, the Industrial Revolution and its impact on the development of modern economic systems, European imperialism, and the Enlightenment's impact on political revolutions; and
  - (F) identify major causes and describe the major effects of the following important turning points in world history from 1914 to the present: the world wars and their impact on political, economic, and social systems; communist revolutions and their impact on the Cold War; independence movements; and globalization.
- (2) History. The student understands how early civilizations developed from 8000 BC to 500 BC. The student is expected to:
- (A) summarize the impact of the development of farming (Neolithic Revolution) on the creation of river valley civilizations;
  - (B) identify the characteristics of civilization; and
  - (C) explain how major river valley civilizations influenced the development of the classical civilizations.
- (3) History. The student understands the contributions and influence of classical civilizations from 500 BC to AD 600 on subsequent civilizations. The student is expected to:
- (A) describe the major political, religious/philosophical, and cultural influences of Persia, India, China, Israel, Greece, and Rome;
  - (B) explain the impact of the fall of Rome on Western Europe; and
  - (C) compare the factors that led to the collapse of Rome and Han China.
- (4) History. The student understands how, after the collapse of classical empires, new political, economic, and social systems evolved and expanded from 600 to 1450. The student is expected to:
- (A) explain the development of Roman Catholicism and Eastern Orthodoxy as social and political factors in medieval Europe and the Byzantine Empire;
  - (B) describe the major characteristics of and the factors contributing to the development of the political/social system of feudalism and the economic system of manorialism;
  - (C) explain the political, economic, and social impact of Islam on Europe, Asia, and Africa;
  - (D) describe the interactions among Muslim, Christian, and Jewish societies in Europe, Asia, and North Africa;
  - (E) describe the interactions between Muslim and Hindu societies in South Asia;
  - (F) explain how the Crusades, the Black Death, and the Hundred Years' War contributed to the end of medieval Europe;
  - (G) summarize the major political, economic, and cultural developments in Tang and Song China and their impact on Eastern Asia;

- (H) explain the evolution and expansion of the slave trade;
  - (I) analyze how the Silk Road and the African gold-salt trade facilitated the spread of ideas and trade; and
  - (J) summarize the changes resulting from the Mongol invasions of Russia, China, and the Islamic world.
- (5) History. The student understands the causes, characteristics, and impact of the European Renaissance and the Reformation from 1450 to 1750. The student is expected to:
- (A) explain the political, intellectual, artistic, economic, and religious impact of the Renaissance; and
  - (B) explain the political, intellectual, artistic, economic, and religious impact of the Reformation.
- (6) History. The student understands the characteristics and impact of the Maya, Inca, and Aztec civilizations. The student is expected to:
- (A) compare the major political, economic, social, and cultural developments of the Maya, Inca, and Aztec civilizations and explain how prior civilizations influenced their development; and
  - (B) explain how the Inca and Aztec empires were impacted by European exploration/colonization.
- (7) History. The student understands the causes and impact of increased global interaction from 1450 to 1750. The student is expected to:
- (A) analyze the causes of European expansion from 1450 to 1750;
  - (B) explain the impact of the Columbian Exchange;
  - (C) explain the impact of the Atlantic slave trade on West Africa and the Americas;
  - (D) explain the impact of the Ottoman Empire on Eastern Europe and global trade;
  - (E) explain Ming China's impact on global trade; and
  - (F) explain new economic factors and principles of Europe's Commercial Revolution.
- (8) History. The student understands the causes and the global impact of the Industrial Revolution and European imperialism from 1750 to 1914. The student is expected to:
- (A) explain how the Industrial Revolution led to political, economic, and social changes;
  - (B) identify the major political, economic, and social motivations that influenced European imperialism;
  - (C) explain the major characteristics and impact of European imperialism; and
  - (D) explain the effects of free enterprise in the Industrial Revolution.
- (9) History. The student understands the causes and effects of major political revolutions between 1750 and 1914. The student is expected to:
- (A) compare the causes, characteristics, and consequences of the American and French revolutions, emphasizing the role of the Enlightenment;
  - (B) explain the impact of Napoleon Bonaparte and the Napoleonic Wars on Europe and Latin America;
  - (C) trace the influence of the American and French revolutions on Latin America, including the role of Simón Bolívar; and

- (D) identify the influence of ideas such as separation of powers, checks and balances, liberty, equality, democracy, popular sovereignty, human rights, constitutionalism, and nationalism on political revolutions.
- (10) History. The student understands the causes and impact of World War I. The student is expected to:
- (A) identify the importance of imperialism, nationalism, militarism, and the alliance system in causing World War I;
  - (B) identify major characteristics of World War I, including total war, trench warfare, modern military technology, and high casualty rates;
  - (C) explain the political and economic impact of the Treaty of Versailles, including changes in boundaries and the mandate system; and
  - (D) identify the causes of the February (March) and October (November) revolutions of 1917 in Russia, their effects on the outcome of World War I, and the Bolshevik establishment of the Union of Soviet Socialist Republics.
- (11) History. The student understands the causes and impact of the global economic depression immediately following World War I. The student is expected to:
- (A) summarize the international, political, and economic causes of the global depression; and
  - (B) explain the responses of governments to the global depression such as in the United States, Germany, Great Britain, and France.
- (12) History. The student understands the causes and impact of World War II. The student is expected to:
- (A) describe the emergence and characteristics of totalitarianism;
  - (B) explain the roles of various world leaders, including Benito Mussolini, Adolf Hitler, Hideki Tojo, Joseph Stalin, Franklin D. Roosevelt, and Winston Churchill, prior to and during World War II; and
  - (C) explain the major causes and events of World War II, including the German invasions of Poland and the Soviet Union, the Holocaust, the attack on Pearl Harbor, the Normandy landings, and the dropping of the atomic bombs.
- (13) History. The student understands the impact of major events associated with the Cold War and independence movements. The student is expected to:
- (A) summarize how the outcome of World War II contributed to the development of the Cold War;
  - (B) summarize the factors that contributed to communism in China, including Mao Zedong's role in its rise;
  - (C) identify major events of the Cold War, including the Korean War, the Vietnam War, and the arms race;
  - (D) explain the roles of modern world leaders, including Ronald Reagan, Mikhail Gorbachev, Lech Walesa, and Pope John Paul II, in the collapse of communism in Eastern Europe and the Soviet Union;
  - (E) summarize the rise of independence movements in Africa, the Middle East, and South Asia and reasons for ongoing conflicts; and
  - (F) discuss factors contributing to the Arab-Israeli conflict, including the rejection of the existence of the state of Israel by the Arab League and a majority of Arab nations.
- (14) History. The student understands the development and use of radical Islamic terrorism in the second half of the 20th century and the early 21st century. The student is expected to:

- (A) explain the impact of geopolitical influences on the development of radical Islamic terrorism;
  - (B) explain the impact of radical Islamic terrorism on global events; and
  - (C) explain the U.S. response to the events surrounding September 11, 2001, and other acts of radical Islamic terrorism.
- (15) Geography. The student understands the impact of geographic factors on major historic events and processes. The student is expected to:
- (A) locate places and regions of historical significance directly related to major eras and turning points in world history;
  - (B) analyze the influence of human and physical geographic factors on major events in world history such as the development of river valley civilizations, trade in the Indian Ocean, and the opening of the Panama and Suez canals; and
  - (C) interpret maps, charts, and graphs to explain how geography has influenced people and events in the past.
- (16) Economics. The student understands the impact of the Neolithic and Industrial revolutions and globalization on humanity. The student is expected to:
- (A) identify important changes in human life caused by the Neolithic Revolution;
  - (B) summarize the role of economics in driving political changes as related to the Industrial Revolution; and
  - (C) describe the economic impact of globalization.
- (17) Economics. The student understands the historical origins of contemporary economic systems and the benefits of free enterprise in world history. The student is expected to:
- (A) identify the historical origins and characteristics of the free enterprise system, including the influence of Adam Smith;
  - (B) identify the historical origins and characteristics of communism, including the influence of Karl Marx;
  - (C) identify the historical origins and characteristics of socialism;
  - (D) identify the historical origins and characteristics of fascism; and
  - (E) explain why communist command economies collapsed in competition with free market economies at the end of the 20th century.
- (18) Government. The student understands the characteristics of major political systems throughout history. The student is expected to:
- (A) identify the characteristics of monarchies and theocracies as forms of government in early civilizations; and
  - (B) identify the characteristics of the following political systems: theocracy, absolute monarchy, democracy, republic, oligarchy, limited monarchy, and totalitarianism.
- (19) Government. The student understands how contemporary political systems have developed from earlier systems of government. The student is expected to:
- (A) explain the development of democratic-republican government from its beginnings in Judeo-Christian legal tradition and classical Greece and Rome through the French Revolution;
  - (B) identify the impact of political and legal ideas contained in the following documents: Hammurabi's Code, the Jewish Ten Commandments, Justinian's Code of Laws, Magna

- Carta, the English Bill of Rights, the Declaration of Independence, the U.S. Constitution, and the Declaration of the Rights of Man and of the Citizen;
- (C) explain the political philosophies of individuals such as John Locke, Thomas Hobbes, Voltaire, Charles de Montesquieu, Jean Jacques Rousseau, Thomas Aquinas, John Calvin, and William Blackstone; and
- (D) explain the significance of the League of Nations and the United Nations.
- (20) Citizenship. The student understands the significance of political choices and decisions made by individuals, groups, and nations throughout history. The student is expected to:
- (A) describe how people have participated in supporting or changing their governments;
- (B) describe the rights and responsibilities of citizens and noncitizens in civic participation throughout history; and
- (C) identify examples of key persons who were successful in shifting political thought, including William Wilberforce.
- (21) Citizenship. The student understands the historical development of significant legal and political concepts related to the rights and responsibilities of citizenship. The student is expected to:
- (A) summarize the development of the rule of law from ancient to modern times;
- (B) identify the origins of ideas regarding the right to a "trial by a jury of your peers" and the concepts of "innocent until proven guilty" and "equality before the law" from sources including the Judeo-Christian legal tradition and in Greece and Rome;
- (C) identify examples of politically motivated mass murders such as in Cambodia, China, Latin America, and the Soviet Union;
- (D) identify examples of genocide, including the Holocaust and genocide in Armenia, the Balkans, Rwanda, and Darfur;
- (E) identify examples of individuals who led resistance to political oppression such as Nelson Mandela, Mohandas Gandhi, Las Madres de la Plaza de Mayo, and Chinese student protestors in Tiananmen Square; and
- (F) identify examples of American ideals that have advanced human rights and democratic ideas throughout the world.
- (22) Culture. The student understands the history and relevance of major religious and philosophical traditions. The student is expected to:
- (A) describe the historical origins and central ideas in the development of monotheism;
- (B) describe the historical origins, central ideas, and spread of major religious and philosophical traditions, including Buddhism, Christianity, Confucianism, Hinduism, Islam, Judaism, and Sikhism; and
- (C) identify examples of religious influence on various events referenced in the major eras of world history.
- (23) Culture. The student understands the roles of women, children, and families in different historical cultures. The student is expected to:
- (A) describe the changing roles of women, children, and families during major eras of world history; and
- (B) describe the major influences of women during major eras of world history such as Elizabeth I, Queen Victoria, Mother Teresa, Indira Gandhi, Margaret Thatcher, and Golda Meir.
- (24) Culture. The student understands how the development of ideas has influenced institutions and societies. The student is expected to:

- (A) summarize the fundamental ideas and institutions of Eastern civilizations that originated in China and India;
  - (B) summarize the fundamental ideas and institutions of Western civilizations that originated in Greece and Rome;
  - (C) explain how the relationship between Christianity and Humanism that began with the Renaissance influenced subsequent political developments; and
  - (D) explain how geopolitical and religious influences have impacted law and government in the Muslim world.
- (25) Culture. The student understands the relationship between the arts and the times during which they were created. The student is expected to:
- (A) analyze examples of how art, architecture, literature, music, and drama reflect the history of the cultures in which they are produced; and
  - (B) describe examples of art, music, and literature that transcend the cultures in which they were created and convey universal themes.
- (26) Science, technology, and society. The student understands how major scientific and mathematical discoveries and technological innovations affected societies prior to 1750. The student is expected to:
- (A) identify the origin and diffusion of major ideas in mathematics, science, and technology that occurred in river valley civilizations, classical Greece and Rome, classical India, the Islamic caliphates between 700 and 1200, and China from the Tang to Ming dynasties;
  - (B) summarize the major ideas in astronomy, mathematics, and architectural engineering that developed in the Maya, Inca, and Aztec civilizations;
  - (C) explain the impact of the printing press on the Renaissance and the Reformation in Europe;
  - (D) describe the origins of the Scientific Revolution in 16th century Europe and explain its impact on scientific thinking worldwide; and
  - (E) identify the contributions of significant scientists such as Archimedes, Copernicus, Eratosthenes, Galileo, Pythagoras, Isaac Newton, and Robert Boyle.
- (27) Science, technology, and society. The student understands how major scientific and mathematical discoveries and technological innovations have affected societies from 1750 to the present. The student is expected to:
- (A) explain the role of textile manufacturing, steam technology, development of the factory system, and transportation technology in the Industrial Revolution;
  - (B) explain the roles of military technology, transportation technology, communication technology, and medical advancements in initiating and advancing 19th century imperialism;
  - (C) explain the effects of major new military technologies on World War I, World War II, and the Cold War;
  - (D) explain the role of telecommunication technology, computer technology, transportation technology, and medical advancements in developing the modern global economy and society; and
  - (E) identify the contributions of significant scientists and inventors such as Marie Curie, Thomas Edison, Albert Einstein, Louis Pasteur, and James Watt.
- (28) Social studies skills. The student understands how historians use historiography to interpret the past and applies critical-thinking skills to organize and use information acquired from a variety of valid sources, including technology. The student is expected to:



- (A) identify methods used by archaeologists, anthropologists, historians, and geographers to analyze evidence;
  - (B) explain how historians analyze sources for frame of reference, historical context, and point of view to interpret historical events;
  - (C) analyze primary and secondary sources to determine frame of reference, historical context, and point of view;
  - ~~(D) evaluate a variety of historical and contemporary sources for validity, credibility, bias, and accuracy;~~
  - ~~[(D) evaluate the validity of a source based on bias, corroboration with other sources, and information about the author.]~~
  - (E) analyze information by sequencing, categorizing, identifying cause-and-effect relationships, comparing, contrasting, finding the main idea, summarizing, making generalizations and predictions, drawing inferences and conclusions, and developing connections between historical events over time; and
  - ~~(F) formulate and communicate visually, orally, or in writing a claim supported by evidence and reasoning for an intended audience and purpose.~~
  - ~~[(F) construct a thesis on a social studies issue or event supported by evidence.]~~
- (29) Social studies skills. The student uses geographic skills and tools to collect, analyze, and interpret data. The student is expected to:
- (A) create and interpret thematic maps, graphs, and charts to demonstrate the relationship between geography and the historical development of a region or nation; and
  - (B) analyze and compare geographic distributions and patterns in world history shown on maps, graphs, charts, and models.
- (30) Social studies skills. The student communicates in written, oral, and visual forms. The student is expected to:
- (A) use social studies terminology correctly;
  - (B) use effective written communication skills, including proper citations and avoiding plagiarism; ~~and~~
  - (C) interpret and create written, oral, and visual presentations of social studies information ; ~~and~~ [;]
  - ~~(D) apply foundational language skills to engage in civil discourse about social studies topics, including those with multiple perspectives.~~
- (31) Social studies skills. The student uses problem-solving and decision-making skills, working independently and with others. The student is expected to :
- ~~(A) explain governmental and democratic processes such as voting, due process, and caucuses using simulations and models; and~~
  - ~~(B) use problem-solving and decision-making processes to identify a problem, gather information, list and consider options, consider advantages and disadvantages, choose and implement a solution, and evaluate the effectiveness of the solution.~~

**§113.43. World Geography Studies (One Credit), Adopted 2022 ~~[2018]~~ .**

- (a) ~~Implementation. The provisions of this section shall be implemented by school districts beginning with the 2024-2025 [2025-2026] school year.~~

- ~~[(1) No later than July 31, 2024, the commissioner of education shall determine whether instructional materials funding has been made available to Texas public schools for materials that cover the essential knowledge and skills identified in this section.]~~
- ~~[(2) If the commissioner makes the determination that instructional materials funding has been made available, this section shall be implemented beginning with the 2025-2026 school year and apply to the 2025-2026 and subsequent school years.]~~
- ~~[(3) If the commissioner does not make the determination that instructional materials funding has been made available under this subsection, the commissioner shall determine no later than August 31 of each subsequent school year whether instructional materials funding has been made available. If the commissioner determines that instructional materials funding has been made available, the commissioner shall notify the State Board of Education and school districts that this section shall be implemented for the following school year.]~~

(b) ~~(a)~~ General requirements. Students shall be awarded one unit of credit for successful completion of this course.

(c) ~~(b)~~ Introduction.

- (1) In World Geography Studies, students examine people, places, and environments at local, regional, national, and international scales from the spatial and ecological perspectives of geography. Students describe the influence of geography on events of the past and present with emphasis on contemporary issues. A significant portion of the course centers around the physical processes that shape patterns in the physical environment; the characteristics of major landforms, climates, and ecosystems and their interrelationships; the political, economic, and social processes that shape cultural patterns of regions; types and patterns of settlement; the distribution and movement of the world population; relationships among people, places, and environments; and the concept of region. Students analyze how location affects economic activities in different economic systems. Students identify the processes that influence political divisions of the planet and analyze how different points of view affect the development of public policies. Students compare how components of culture shape the characteristics of regions and analyze the impact of technology and human modifications on the physical environment. Students use problem-solving and decision-making skills to ask and answer geographic questions.
- (2) To support the teaching of the essential knowledge and skills, the use of a variety of rich primary and secondary source material such as contemporary and historic maps of various types, satellite-produced images, photographs, graphs, map sketches, and diagrams is encouraged.
- (3) The eight strands of the essential knowledge and skills for social studies are intended to be integrated for instructional purposes. Skills listed in the social studies skills strand in subsection ~~(d)~~ ~~(e)~~ of this section should be incorporated into the teaching of all essential knowledge and skills for social studies. A greater depth of understanding of complex content material can be attained when integrated social studies content from the various disciplines and critical-thinking skills are taught together. Statements that contain the word "including" reference content that must be mastered, while those containing the phrase "such as" are intended as possible illustrative examples.
- (4) Students identify the role of the U.S. free enterprise system within the parameters of this course and understand that this system may also be referenced as capitalism or the free market system.
- (5) Throughout social studies in Kindergarten-Grade 12, students build a foundation in history; geography; economics; government; citizenship; culture; science, technology, and society; and social studies skills. The content, as appropriate for the grade level or course, enables students to understand the importance of patriotism, function in a free enterprise society, and appreciate the basic democratic values of our state and nation as referenced in the Texas Education Code (TEC), §28.002(h).
- (6) Students understand that a constitutional republic is a representative form of government whose representatives derive their authority from the consent of the governed, serve for an established tenure, and are sworn to uphold the constitution.

- (7) State and federal laws mandate a variety of celebrations and observances, including Celebrate Freedom Week.
- (A) Each social studies class shall include, during Celebrate Freedom Week as provided under the TEC, §29.907, or during another full school week as determined by the board of trustees of a school district, appropriate instruction concerning the intent, meaning, and importance of the Declaration of Independence and the U.S. Constitution, including the Bill of Rights, in their historical contexts. The study of the Declaration of Independence must include the study of the relationship of the ideas expressed in that document to subsequent American history, including the relationship of its ideas to the rich diversity of our people as a nation of immigrants, the American Revolution, the formulation of the U.S. Constitution, and the abolitionist movement, which led to the Emancipation Proclamation and the women's suffrage movement.
- (B) Each school district shall require that, during Celebrate Freedom Week or other week of instruction prescribed under subparagraph (A) of this paragraph, students in Grades 3-12 study and recite the following text from the Declaration of Independence: "We hold these Truths to be self-evident, that all Men are created equal, that they are endowed by their Creator with certain unalienable Rights, that among these are Life, Liberty and the Pursuit of Happiness--That to secure these Rights, Governments are instituted among Men, deriving their just Powers from the Consent of the Governed."
- (8) Students discuss how and whether the actions of U.S. citizens and the local, state, and federal governments have achieved the ideals espoused in the founding documents.

(d) ~~(e)~~ Knowledge and skills.

- (1) History. The student understands how geography and processes of spatial exchange (diffusion) influenced events in the past and helped to shape the present. The student is expected to:
- (A) analyze significant physical features and environmental conditions that have influenced the past and migration patterns and have shaped the distribution of culture groups today; and
- (B) trace the spatial diffusion of phenomena such as the Columbian Exchange or the diffusion of American popular culture and describe the effects on regions of contact.
- (2) History. The student understands how people, places, and environments have changed over time and the effects of these changes. The student is expected to:
- (A) describe the human and physical characteristics of the same regions at different periods of time to analyze relationships between past events and current conditions; and
- (B) explain how changes in societies such as population shifts, technological advancements, and environmental policies have led to diverse uses of physical features over time such as terrace farming, dams, and polders.
- (3) Geography. The student understands how physical processes shape patterns in the physical environment. The student is expected to:
- (A) explain weather conditions and climate in relation to annual changes in Earth-Sun relationships;
- (B) describe the physical processes that affect the environments of regions, including weather, tectonic forces, erosion, and soil-building processes; and
- (C) describe how physical processes such as hurricanes, El Niño, earthquakes, and volcanoes affect the lithosphere, atmosphere, hydrosphere, and biosphere.
- (4) Geography. The student understands the patterns and characteristics of major landforms, climates, and ecosystems of Earth and the interrelated processes that produce them. The student is expected to:

- (A) explain how elevation, latitude, wind systems, ocean currents, position on a continent, and mountain barriers influence temperature, precipitation, and distribution of climate regions;
  - (B) describe different landforms such as plains, mountains, and islands and the physical processes that cause their development; and
  - (C) explain the influence of climate on the distribution of biomes in different regions.
- (5) Geography. The student understands how political, economic, and social processes shape cultural patterns and characteristics in various places and regions. The student is expected to:
- (A) analyze how the character of a place is related to its political, economic, social, and cultural elements; and
  - (B) interpret political, economic, social, and demographic indicators (gross domestic product per capita, life expectancy, literacy, and infant mortality) to determine the level of development and standard of living in nations using the levels as defined by the Human Development Index.
- (6) Geography. The student understands the types, patterns, and processes of settlement. The student is expected to:
- (A) locate and describe human and physical features that influence the size and distribution of settlements; and
  - (B) explain the processes that have caused changes in settlement patterns, including urbanization, transportation, access to and availability of resources, and economic activities.
- (7) Geography. The student understands the growth, distribution, movement, and characteristics of world population. The student is expected to:
- (A) analyze population pyramids and use other data, graphics, and maps to describe the population characteristics of different societies and to predict future population trends;
  - (B) explain how physical geography and push and pull forces, including political, economic, social, and environmental conditions, affect the routes and flows of human migration;
  - (C) describe trends in world population growth and distribution; and
  - (D) analyze how globalization affects connectivity, standard of living, pandemics, and loss of local culture.
- (8) Geography. The student understands how people, places, and environments are connected and interdependent. The student is expected to:
- (A) compare ways that humans depend on, adapt to, and modify the physical environment, including the influences of culture and technology;
  - (B) analyze the consequences of extreme weather and other natural disasters such as El Niño, floods, tsunamis, and volcanoes on people and their environment; and
  - (C) evaluate the economic and political relationships between settlements and the environment, including sustainable development and renewable/non-renewable resources.
- (9) Geography. The student understands the concept of region as an area of Earth's surface with related geographic characteristics. The student is expected to:
- (A) identify physical and/or human factors such as climate, vegetation, language, trade networks, political units, river systems, and religion that constitute a region; and
  - (B) describe different types of regions, including formal, functional, and perceptual regions.
- (10) Economics. The student understands the distribution, characteristics, and interactions of the economic systems in the world. The student is expected to:

- (A) describe the forces that determine the distribution of goods and services in traditional, free enterprise, socialist, and communist economic systems;
  - (B) classify countries along the economic spectrum between free enterprise and communism;
  - (C) compare the ways people satisfy their basic needs through the production of goods and services such as subsistence agriculture versus commercial agriculture or cottage industries versus commercial industries; and
  - (D) compare global trade patterns over time and analyze the implications of globalization, including outsourcing and free trade zones.
- (11) Economics. The student understands how geography influences economic activities. The student is expected to:
- (A) understand the connections between levels of development and economic activities (primary, secondary, tertiary, and quaternary);
  - (B) identify the factors affecting the location of different types of economic activities, including subsistence and commercial agriculture, manufacturing, and service industries; and
  - (C) assess how changes in climate, resources, and infrastructure (technology, transportation, and communication) affect the location and patterns of economic activities.
- (12) Economics. The student understands the economic importance of, and issues related to, the location and management of resources. The student is expected to:
- (A) analyze how the creation, distribution, and management of key natural resources affects the location and patterns of movement of products, money, and people; and
  - (B) evaluate the geographic and economic impact of policies related to the development, use, and scarcity of natural resources such as regulations of water.
- (13) Government. The student understands the spatial characteristics of a variety of global political units. The student is expected to:
- (A) interpret maps to explain the division of land, including man-made and natural borders, into separate political units such as cities, states, or countries; and
  - (B) compare maps of voting patterns and political boundaries to make inferences about the distribution of political power.
- (14) Government. The student understands the processes that influence political divisions, relationships, and policies. The student is expected to:
- (A) analyze current events to infer the physical and human processes that lead to the formation of boundaries and other political divisions;
  - (B) compare how democracy, dictatorship, monarchy, republic, theocracy, and totalitarian systems operate in specific countries; and
  - (C) analyze the human and physical factors that influence control of territories and resources, conflict/war, and international relations of sovereign nations such as China, the United States, Japan, and Russia and international organizations such as the United Nations (UN) and the European Union (EU).
- (15) Citizenship. The student understands how different points of view influence the development of public policies and decision-making processes at national and international levels. The student is expected to:
- (A) identify and give examples of different points of view that influence the development of public policies and decision-making processes at national and international levels; and

- (B) explain how citizenship practices, public policies, and decision making may be influenced by cultural beliefs, including nationalism and patriotism.
- (16) Culture. The student understands how the components of culture affect the way people live and shape the characteristics of regions. The student is expected to:
- (A) describe distinctive cultural patterns and landscapes associated with different places in Texas, the United States, and other regions of the world and how these patterns influenced the processes of innovation and diffusion;
  - (B) describe elements of culture, including language, religion, beliefs, institutions, and technologies; and
  - (C) describe life in a variety of urban and rural areas in the world to compare political, economic, social, and environmental changes.
- (17) Culture. The student understands the distribution, patterns, and characteristics of different cultures. The student is expected to:
- (A) describe and compare patterns of culture such as language, religion, land use, education, and customs that make specific regions of the world distinctive;
  - (B) describe central ideas and spatial distribution of major religious traditions, including Buddhism, Christianity, Hinduism, Islam, Judaism, and Sikhism;
  - (C) compare economic, political, or social opportunities in different cultures for underrepresented populations such as women and ethnic and religious minorities; and
  - (D) evaluate the experiences and contributions of diverse groups to multicultural societies.
- (18) Culture. The student understands the ways in which cultures change and maintain continuity. The student is expected to:
- (A) analyze cultural changes in specific regions caused by migration, war, trade, innovations, and diffusion;
  - (B) assess causes and effects of conflicts between groups of people, including modern genocides and terrorism;
  - (C) identify examples of cultures that maintain traditional ways, including traditional economies; and
  - (D) evaluate the spread of cultural traits to find examples of cultural convergence and divergence such as the spread of democratic ideas, language, foods, technology, or global sports.
- (19) Science, technology, and society. The student understands the impact of technology and human modifications on the physical environment. The student is expected to:
- (A) evaluate the significance of major technological innovations in the areas of transportation and energy that have been used to modify the physical environment;
  - (B) analyze ways technological innovations such as air conditioning and desalination have allowed humans to adapt to places; and
  - (C) analyze the environmental, economic, and social impacts of advances in technology on agriculture and natural resources.
- (20) Science, technology, and society. The student understands how current technology affects human interaction. The student is expected to:
- (A) describe the impact of new information technologies such as the Internet, Global Positioning System (GPS), or Geographic Information Systems (GIS); and
  - (B) examine the economic, environmental, and social effects of technology such as medical advancements or changing trade patterns on societies at different levels of development.

- (21) Social studies skills. The student applies critical-thinking skills to organize and use information acquired through established research methodologies from a variety of valid sources, including technology. The student is expected to:
- (A) analyze and evaluate a variety of ~~[the validity and utility of multiple]~~ sources of geographic information such as primary and secondary sources, aerial photographs, and maps for validity, utility, credibility, bias, and accuracy ;
  - (B) identify places of contemporary geopolitical significance on a map;
  - (C) create and interpret different types of maps to answer geographic questions, infer relationships, and analyze change;
  - (D) analyze information by sequencing, categorizing, identifying cause-and-effect relationships, comparing, contrasting, finding the main idea, summarizing, making generalizations and predictions, drawing inferences and conclusions, and developing connections over time; ~~[and]~~
  - (E) identify different points of view about an issue or current topic ; ~~and~~ [;]
  - (F) formulate and communicate visually, orally, or in writing a claim supported by evidence and reasoning for an intended audience and purpose.
- (22) Social studies skills. The student communicates in written, oral, and visual forms. The student is expected to:
- (A) create appropriate graphics such as maps, diagrams, tables, and graphs to communicate geographic features, distributions, and relationships;
  - (B) generate summaries, generalizations, and thesis statements supported by evidence;
  - (C) use social studies terminology correctly; ~~[and]~~
  - (D) create original work using effective written communication skills, including proper citations and understanding and avoiding plagiarism ; ~~and~~ [;]
  - (E) apply foundational language skills to engage in civil discourse about social studies topics, including those with multiple perspectives.
- (23) Social studies skills. The student uses problem-solving and decision-making skills, working independently and with others. The student is expected to:
- (A) explain governmental and democratic processes such as voting, due process, and caucuses using simulations and models;
  - (B) ~~[(A)]~~ plan, organize, and complete a research project that involves asking geographic questions; acquiring, organizing, and analyzing information; answering questions; and communicating results;
  - (C) ~~[(B)]~~ use case studies and GIS to identify contemporary challenges and to answer real-world questions; and
  - (D) ~~[(C)]~~ use problem-solving and decision-making processes to identify a problem, gather information, list and consider options, consider advantages and disadvantages, choose and implement a solution, and evaluate the effectiveness of the solution.

**§113.44. United States Government (One-Half Credit), Adopted 2022 ~~[2018]~~ .**

- (a) Implementation. The provisions of this section shall be implemented by school districts beginning with the 2024-2025 ~~[2025-2026]~~ school year.
- ~~[(1) No later than July 31, 2024, the commissioner of education shall determine whether instructional materials funding has been made available to Texas public schools for materials that cover the essential knowledge and skills identified in this section.]~~

~~[(2) If the commissioner makes the determination that instructional materials funding has been made available, this section shall be implemented beginning with the 2025-2026 school year and apply to the 2025-2026 and subsequent school years.]~~

~~[(3) If the commissioner does not make the determination that instructional materials funding has been made available under this subsection, the commissioner shall determine no later than August 31 of each subsequent school year whether instructional materials funding has been made available. If the commissioner determines that instructional materials funding has been made available, the commissioner shall notify the State Board of Education and school districts that this section shall be implemented for the following school year.]~~

(b) ~~(a)~~ General requirements. Students shall be awarded one-half unit of credit for successful completion of this course.

(c) ~~(b)~~ Introduction.

- (1) In United States Government, the focus is on the principles and beliefs upon which the United States was founded and on the structure, functions, and powers of government at the national, state, and local levels. This course is the culmination of the civic and governmental content and concepts studied from Kindergarten through required secondary courses. Students learn major political ideas and forms of government in history. A significant focus of the course is on the U.S. Constitution, its underlying principles and ideas, and the form of government it created. Students analyze major concepts of republicanism, federalism, checks and balances, separation of powers, popular sovereignty, and individual rights and compare the U.S. system of government with other political systems. Students identify the role of government in the U.S. free enterprise system and examine the strategic importance of places to the United States. Students analyze the impact of individuals, political parties, interest groups, and the media on the American political system, evaluate the importance of voluntary individual participation in a constitutional republic, and analyze the rights guaranteed by the U.S. Constitution. Students examine the relationship between governmental policies and the culture of the United States. Students identify examples of government policies that encourage scientific research and use critical-thinking skills to create a product on a contemporary government issue.
- (2) To support the teaching of the essential knowledge and skills, the use of a variety of rich primary and secondary source material such as the complete text of the U.S. Constitution, selected Federalist Papers, landmark cases of the U.S. Supreme Court (such as those studied in Grade 8 and U.S. History Since 1877), biographies, autobiographies, memoirs, speeches, letters, and periodicals that feature analyses of political issues and events is encouraged.
- (3) The eight strands of the essential knowledge and skills for social studies are intended to be integrated for instructional purposes. Skills listed in the social studies skills strand in subsection ~~(d)~~ ~~(e)~~ of this section should be incorporated into the teaching of all essential knowledge and skills for social studies. A greater depth of understanding of complex content material can be attained when integrated social studies content from the various disciplines and critical-thinking skills are taught together. Statements that contain the word "including" reference content that must be mastered, while those containing the phrase "such as" are intended as possible illustrative examples.
- (4) Students identify the role of the U.S. free enterprise system within the parameters of this course and understand that this system may also be referenced as capitalism or the free market system.
- (5) Throughout social studies in Kindergarten-Grade 12, students build a foundation in history; geography; economics; government; citizenship; culture; science, technology, and society; and social studies skills. The content, as appropriate for the grade level or course, enables students to understand the importance of patriotism, function in a free enterprise society, and appreciate the basic democratic values of our state and nation as referenced in the Texas Education Code (TEC), §28.002(h).



- (6) Students understand that a constitutional republic is a representative form of government whose representatives derive their authority from the consent of the governed, serve for an established tenure, and are sworn to uphold the constitution.
- (7) State and federal laws mandate a variety of celebrations and observances, including Celebrate Freedom Week.
  - (A) Each social studies class shall include, during Celebrate Freedom Week as provided under the TEC, §29.907, or during another full school week as determined by the board of trustees of a school district, appropriate instruction concerning the intent, meaning, and importance of the Declaration of Independence and the U.S. Constitution, including the Bill of Rights, in their historical contexts. The study of the Declaration of Independence must include the study of the relationship of the ideas expressed in that document to subsequent American history, including the relationship of its ideas to the rich diversity of our people as a nation of immigrants, the American Revolution, the formulation of the U.S. Constitution, and the abolitionist movement, which led to the Emancipation Proclamation and the women's suffrage movement.
  - (B) Each school district shall require that, during Celebrate Freedom Week or other week of instruction prescribed under subparagraph (A) of this paragraph, students in Grades 3-12 study and recite the following text from the Declaration of Independence: "We hold these Truths to be self-evident, that all Men are created equal, that they are endowed by their Creator with certain unalienable Rights, that among these are Life, Liberty and the Pursuit of Happiness--That to secure these Rights, Governments are instituted among Men, deriving their just Powers from the Consent of the Governed."
- (8) Students discuss how and whether the actions of U.S. citizens and the local, state, and federal governments have achieved the ideals espoused in the founding documents.

(d) ~~(e)~~ Knowledge and skills.

- (1) History. The student understands how constitutional government, as developed in America and expressed in the Declaration of Independence, the Articles of Confederation, and the U.S. Constitution, has been influenced by ideas, people, and historical documents. The student is expected to:
  - (A) explain major political ideas in history, including the laws of nature and nature's God, unalienable rights, divine right of kings, social contract theory, and the rights of resistance to illegitimate government;
  - (B) identify major intellectual, philosophical, political, and religious traditions that informed the American founding, including Judeo-Christian (especially biblical law), English common law and constitutionalism, Enlightenment, and republicanism, as they address issues of liberty, rights, and responsibilities of individuals;
  - (C) identify the individuals whose principles of laws and government institutions informed the American founding documents, including those of Moses, William Blackstone, John Locke, and Charles de Montesquieu;
  - (D) identify the contributions of the political philosophies of the Founding Fathers, including John Adams, Alexander Hamilton, Thomas Jefferson, James Madison, John Jay, George Mason, Roger Sherman, and James Wilson, on the development of the U.S. government;
  - (E) analyze debates and compromises that impacted the creation of the founding documents; and
  - (F) identify significant individuals in the field of government and politics, including George Washington, Thomas Jefferson, John Marshall, Andrew Jackson, Abraham Lincoln, Theodore Roosevelt, Franklin D. Roosevelt, and Ronald Reagan.
- (2) History. The student understands the roles played by individuals, political parties, interest groups, and the media in the U.S. political system, past and present. The student is expected to:

- (A) describe the processes used by individuals, political parties, interest groups, or the media to affect public policy; and
  - (B) analyze the impact of political changes brought about by individuals, political parties, interest groups, or the media, past and present.
- (3) Geography. The student understands how geography can influence U.S. political districts and policies. The student is expected to:
- (A) explain how population shifts affect voting patterns;
  - (B) examine political boundaries to make inferences regarding the distribution of political power; and
  - (C) explain how political districts are crafted and how they are affected by Supreme Court decisions such as *Baker v. Carr*.
- (4) Economics. The student understands the roles played by local, state, and national governments in both the public and private sectors of the U.S. free enterprise system. The student is expected to:
- (A) explain how government fiscal, and regulatory policies influence the economy at the local, state, and national levels;
  - (B) compare the role of government in the U.S. free enterprise system and other economic systems; and
  - (C) explain how government taxation, expenditures, and regulation can influence the U.S. economy and impact private enterprise.
- (5) Economics. The student understands the relationship between U.S. government policies and the economy. The student is expected to:
- (A) analyze how economic and natural resources influence U.S. foreign policy; and
  - (B) describe the roles of the executive and legislative branches in setting international trade and fiscal policies.
- (6) Government. The student understands the American beliefs and principles reflected in the U.S. Constitution and why these are significant. The student is expected to:
- (A) explain the importance of a written constitution;
  - (B) explain how the federal government serves the purposes set forth in the Preamble to the U.S. Constitution;
  - (C) analyze how the Federalist Papers such as Number 10 and Number 51 explain the principles of the American constitutional system of government;
  - (D) evaluate constitutional provisions for limiting the role of government, including republicanism, checks and balances, federalism, separation of powers, popular sovereignty, and individual rights;
  - (E) describe the constitutionally prescribed procedures by which the U.S. Constitution can be changed and analyze the role of the amendment process in a constitutional government; and
  - (F) identify how the Declaration of Independence and the U.S. Constitution continue to shape American beliefs and principles in the United States today.
- (7) Government. The student understands the structure and functions of the government created by the U.S. Constitution. The student is expected to:
- (A) analyze the structure and functions of the legislative branch of government, including the bicameral structure of Congress, the role of committees, and the procedure for enacting laws;

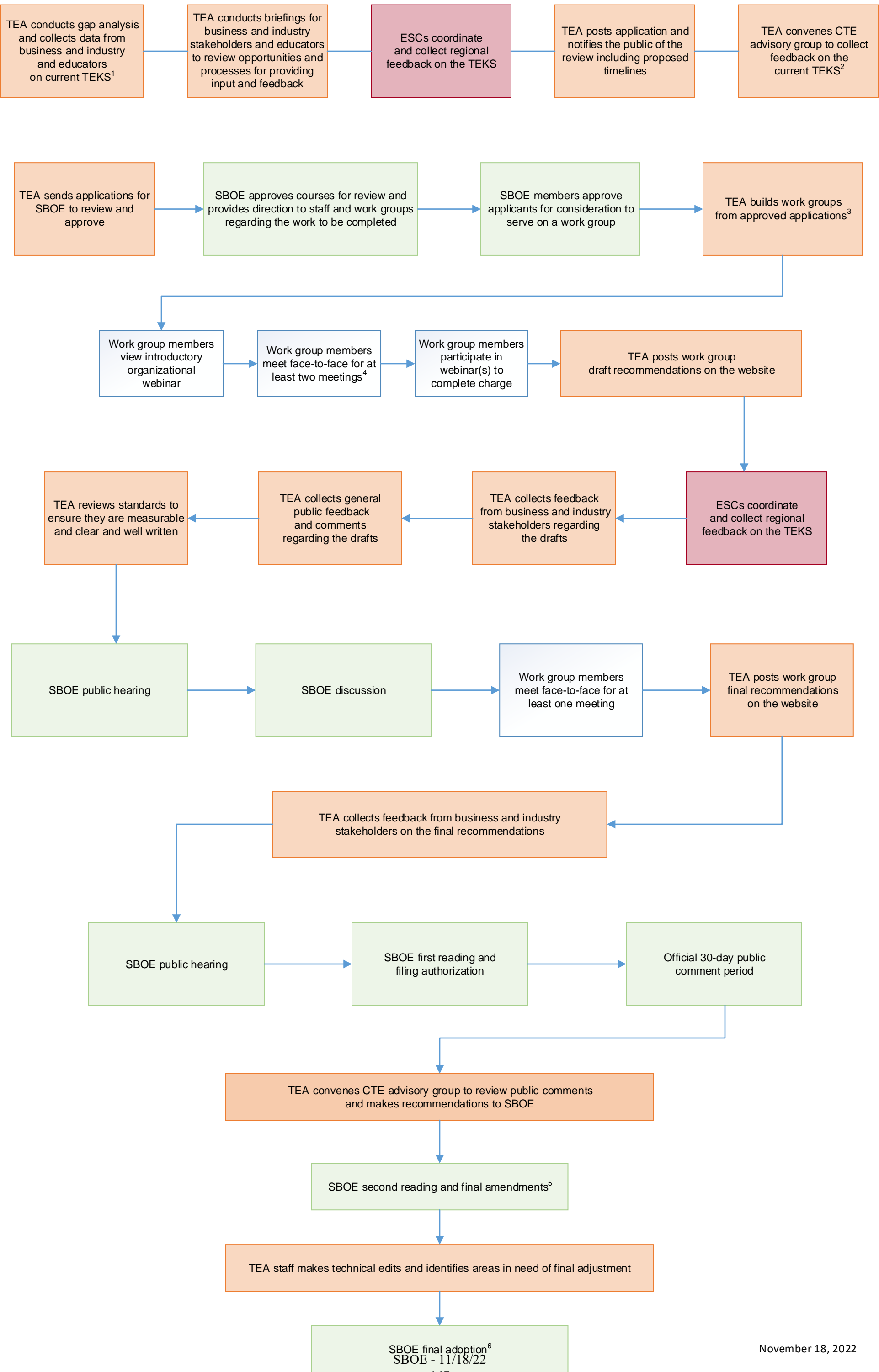
- (B) analyze the structure and functions of the executive branch of government, including the constitutional powers of the president, the growth of presidential power, and the role of the Cabinet and executive departments;
  - (C) analyze the structure and functions of the judicial branch of government, including the federal court system, types of jurisdiction, and judicial review;
  - (D) identify the purpose of selected independent executive agencies, including the National Aeronautics and Space Administration (NASA), and regulatory commissions, including the Environmental Protection Agency (EPA), Occupational Safety and Health Administration (OSHA), Food and Drug Administration (FDA), and Federal Communications Commission (FCC);
  - (E) explain how provisions of the U.S. Constitution provide for checks and balances among the three branches of government;
  - (F) analyze selected issues raised by judicial activism and judicial restraint;
  - (G) explain the major responsibilities of the federal government for domestic and foreign policy such as national defense; and
  - (H) compare the structures, functions, and processes of national, state, and local governments in the U.S. federal system.
- (8) Government. The student understands the concept of federalism. The student is expected to:
- (A) explain why the Founding Fathers created a distinctly new form of federalism and adopted a federal system of government instead of a unitary system;
  - (B) categorize government powers as national, state, or shared;
  - (C) analyze historical and contemporary conflicts over the respective roles of national and state governments; and
  - (D) explain how the U.S. Constitution limits the power of national and state governments.
- (9) Government. The student understands the processes for filling public offices in the U.S. system of government. The student is expected to:
- (A) identify different methods of filling public offices, including elected and appointed offices at the local, state, and national levels;
  - (B) explain the process of electing the president of the United States and analyze the Electoral College; and
  - (C) analyze the impact of the passage of the 17th Amendment.
- (10) Government. The student understands the role of political parties in the U.S. system of government. The student is expected to:
- (A) analyze the functions of political parties and their role in the electoral process at local, state, and national levels; and
  - (B) explain the two-party system and evaluate the role of third parties in the United States.
- (11) Government. The student understands the similarities and differences that exist among the U.S. system of government and other political systems. The student is expected to:
- (A) compare the U.S. constitutional republic to historical and contemporary forms of government such as monarchy, a classical republic, authoritarian, socialist, direct democracy, theocracy, tribal, and other republics; and
  - (B) analyze advantages and disadvantages of presidential and parliamentary systems of government.

- (12) Citizenship. The student understands the rights that are protected and secured by the U.S. Constitution and Bill of Rights. The student is expected to:
- (A) explain the roles of limited government and the rule of law in the protection of individual rights;
  - (B) identify and define the unalienable rights;
  - (C) identify the freedoms and rights protected and secured by each amendment in the Bill of Rights;
  - (D) analyze the reasons the Founding Fathers protected religious freedom in America and guaranteed its free exercise by saying that "Congress shall make no law respecting an establishment of religion, or prohibiting the free exercise thereof," and compare this to the concept of separation of church and state;
  - (E) analyze U.S. Supreme Court interpretations of rights guaranteed by the U.S. Constitution in selected cases, including *Engel v. Vitale*, *Schenck v. United States*, *Texas v. Johnson*, *Miranda v. Arizona*, *Gideon v. Wainwright*, *Mapp v. Ohio*, and *Roe v. Wade*;
  - (F) explain the importance of due process rights to the protection of individual rights and in limiting the powers of government; and
  - (G) recall the conditions that produced the 14th Amendment and describe subsequent efforts to selectively extend some of the Bill of Rights to the states through U.S. Supreme Court rulings and analyze the impact on the scope of fundamental rights and federalism.
- (13) Citizenship. The student understands the difference between personal and civic responsibilities. The student is expected to:
- (A) describe scenarios where good citizenship may require the subordination of personal desire for the sake of the public good;
  - (B) explain the responsibilities, duties, and obligations of citizenship such as being well informed about civic affairs, serving in the military, voting, serving on a jury, observing the laws, paying taxes, and serving the public good; and
  - (C) describe the voter registration process and the criteria for voting in elections.
- (14) Citizenship. The student understands the importance of voluntary individual participation in the U.S. constitutional republic. The student is expected to:
- (A) analyze the effectiveness of various methods of participation in the political process at local, state, and national levels;
  - (B) analyze historical and contemporary examples of citizen movements to bring about political change or to maintain continuity; and
  - (C) describe the factors that influence an individual's political attitudes and actions.
- (15) Citizenship. The student understands the importance of the expression of different points of view in a constitutional republic. The student is expected to:
- (A) analyze different points of view of political parties and interest groups such as the League of United Latin American Citizens (LULAC), the National Rifle Association (NRA), and the National Association for the Advancement of Colored People (NAACP) on important contemporary issues; and
  - (B) analyze the importance of the First Amendment rights of petition, assembly, speech, and press and the Second Amendment right to keep and bear arms.
- (16) Culture. The student understands the relationship between government policies and the culture of the United States. The student is expected to:

- (A) evaluate a U.S. government policy or court decision that has affected a particular racial, ethnic, or religious group, including [such as] the Civil Rights Act of 1964 and the U.S. Supreme Court cases of Hernandez v. Texas and Grutter v. Bollinger; and
  - (B) explain changes in American culture brought about by government policies such as voting rights, the Servicemen's Readjustment Act of 1944 (GI Bill of Rights), the Immigration and Nationality Act of 1965, the Immigration Reform and Control Act of 1986, affirmative action, and racial integration.
- (17) Science, technology, and society. The student understands the role the government plays in developing policies and establishing conditions that influence scientific discoveries and technological innovations. The student is expected to:
- (A) explain how U.S. constitutional protections such as patents have fostered competition and entrepreneurship; and
  - (B) identify examples of government-assisted research that, when shared with the private sector, have resulted in improved consumer products such as computer and communication technologies.
- (18) Science, technology, and society. The student understands the impact of advances in science and technology on government. The student is expected to:
- (A) describe the potential impact of recent scientific discoveries and technological innovations on government policy; and
  - (B) evaluate the impact of the Internet and other electronic information on the political process.
- (19) Social studies skills. The student applies critical-thinking skills to organize and use information acquired through established research methodologies from a variety of valid sources, including technology. The student is expected to:
- (A) analyze information by sequencing, categorizing, identifying cause-and-effect relationships, comparing, contrasting, finding the main idea, summarizing, making generalizations and predictions, and drawing inferences and conclusions;
  - (B) create a product on a contemporary government issue or topic using critical methods of inquiry;
  - (C) analyze and defend a point of view on a current political issue;
  - (D) analyze and evaluate a variety of historical and contemporary sources for [the] validity of information, arguments, [and] counterarguments, credibility, accuracy, [from primary and secondary sources for] bias, propaganda, point of view, and frame of reference; [and]
  - (E) evaluate government data using charts, tables, graphs, and maps ; and [:]
  - (F) formulate and communicate visually, orally, or in writing a claim supported by evidence and reasoning for an intended audience and purpose.
- (20) Social studies skills. The student communicates in written, oral, and visual forms. The student is expected to:
- (A) use social studies terminology correctly; [and]
  - (B) create written, oral, and visual presentations of social studies information using effective communication skills, including proper citations and avoiding plagiarism ; and [:]
  - (C) apply foundational language skills to engage in civil discourse about social studies topics, including those with multiple perspectives.
- (21) Social studies skills. The student uses problem-solving and decision-making skills, working independently and with others. The student is expected to :

- (A) explain governmental and democratic processes such as voting, due process, and caucuses using simulations and models; and
- (B) use problem-solving and decision-making processes to identify a problem, gather information, list and consider options, consider advantages and disadvantages, choose and implement a solution, and evaluate the effectiveness of the solution.

## TEKS Review and Revision Process for Career and Technical Education



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1 TEA will collect information and engage subject matter experts to develop a job skills analysis between the TEKS and the necessary job skills within programs of study. This gap analysis will identify course standards that should be added and deleted in order to better prepare students for postsecondary opportunities.

2 TEA will identify an advisory board of CTE educators and administrators with demonstrated experience in the program(s) of study under review. The advisory board will provide feedback during the review and revision of the CTE TEKS. SBOE members may identify individuals to serve on the advisory board and will have an opportunity to review and approve or deny advisory board members. If a recommended advisory board member is not denied by SBOE members within the determined deadline, the advisory board member will be considered approved.

3 CTE TEKS work groups will be instructed to do the following:

- Review the gap analysis and feedback from various stakeholders
- Ensure the College and Career Readiness Standards (CCRS) are adequately addressed in the TEKS
- Ensure revisions are in compliance with all relevant statutes
- Provide written justifications for all suggested revisions
- Track all revisions to show what has been changed
- Ensure that student expectations are content driven and clearly measurable
- Carefully consider the amount of time necessary for students to develop mastery of the content and ensure that all student expectations reasonably can be taught within the amount of time typically allotted for the subject or course prior to the end of the school year
- Leave any and all official documents with TEA staff

CTE TEKS work groups may be instructed to do the following:

- Use the current CTE TEKS as the foundation document

4 CTE TEKS work groups will include educators, parents, business and industry leaders, and employers [TEC, 28.002(c)] and will include representation from all SBOE members to the extent possible.

5 A member wishing to amend any Texas Essential Knowledge and Skills (TEKS) being considered by the board for second reading and final adoption shall submit the amendment in writing to the staff no later than noon on the day prior to the final vote on the adoption of the TEKS. All amendments shall be made available to the public to the extent possible. This rule may be suspended by a two-thirds vote.

6 The SBOE must specify an implementation date.