

AGENDA
Business Meeting of the
BOARD OF DIRECTORS
Corvallis School District 509J

Meeting Details: Thursday, February 9, 2023, 6:30 PM in the Gymnasium at Lincoln Elementary School, 110 SE Alexander Avenue, Corvallis, OR 97333.

Oregon law allows public meetings to be held entirely online; therefore, we will NOT have seating available at the meeting site. If you would like to watch live-streaming of the School Board meeting, please navigate to the District's YouTube channel: <https://www.youtube.com/channel/UC9Jtpte5dmilZI9kySBJbVQ?> A recording of the meeting will also be posted to that channel.

- I. **CALL TO ORDER AND ROLL CALL (6:30 p.m.)***
- II. **EXECUTIVE SESSION (5:15-6:15 p.m.)* Note: this is not part of the public meeting. The Board will meet in Executive (closed) Session under ORS 192.660(2)(i) regarding the superintendent's performance evaluation.**
- III. **BOARD MEMBER REPORTS**
- IV. **OREGON SCHOOL BOARDS ASSOCIATION (OSBA) AND NATIONAL SCHOOL BOARDS ASSOCIATION (NSBA) UPDATES**

NSBA and OSBA reports

This report provides a summary of the ongoing activities at Oregon School Board Association and National School Board Association. This report

1. Summary of my appointments to OSBA and NSBA
 2. January 2023 OSBA Board Meeting summary
 3. January 2023 NSBA Board and meeting
 4. Presentation at NSBA Equity Institute
 5. Lobbying at the U.S. Senate and House
 - Main issues and priorities
 - Takeaways and feedback
 6. Noteworthy presentations from the equity symposium and advocacy institute
 7. Summary of takeaways and opportunities for follow up
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Summary of my appointments to OSBA and NSBA

I was recently elected by OSBA Board of directors as the president-elect. This starts a 3-year commitment to support school boards and school board members as part of OSBA board of directors executive team. This year as OSBA President-elect, and president in 2024, and immediate past-president in 2025.

I was also selected by NSBA to serve as one of the directors representing the Pacific Region which includes the five states of Alaska, Washington, Oregon, Nevada, and Utah. My committee assignments are to the Constitution and Bylaws committee and NSBA Audit Committee.

Charge of the NSBA Constitution and Bylaws Committee: As specified in the NSBA Constitution and Bylaws - Article V-Delegate Assembly, Section 10- Constitution and Bylaws Committee – There shall be a Constitution and Bylaws Committee composed of five members, one representative from each Region, from the Board of Directors, and a State Association Executive Director of a state association member in good standing of NSBA, who shall be a voting member of the Committee, to be appointed by the President. The Constitution and Bylaws Committee shall perform the duties assigned in this Constitution and Bylaws for amending the Constitution and Bylaws in addition to reviewing the Constitution and Bylaws and making recommendations to the Delegate Assembly

Charge of NSBA Audit Committee

The Audit Committee shall: • Assist the NSBA Board of Directors in ensuring that appropriate accounting policies and internal controls are established and followed; and • Encourage and facilitate communication among and between the NSBA Board of Directors, NSBA management staff, and external auditors.

In these reports, I will be sharing summaries of board meetings, state and national issues of relevance to our local community and district, events, and opportunities for engagement and advocacy for our board and district.

January 2023 OSBA Board Meeting Summary

The current summary was sent by OSBA regional directors to local school board members:

Board renews commitment to OSBA's 'Call for Equity'

Members of the OSBA Board of Directors renewed their commitment Saturday to the association's equity statement, which was originally adopted nearly a year earlier. Board members participated in a series of roundtable discussions over the weekend and discussed the "Call for Equity" and its commitments, which can be seen at <https://www.osba.org/About-OSBA/Article/call%20for%20equity.aspx>

Fundamentally, the statement posits that “all students are accepted as their authentic selves,” and that “student success will not be predicted or predetermined by race, ethnicity, family economics, location, gender, gender identity, sexual orientation, disability status, religion, culture or any other identity.”

Before beginning, Board members discussed their motivations for tackling the work. “I think the reason we’re here is because we believe in the value of public education,” said Vice President Chris Cronin (Grant ESD).

“We need to find a way to disrupt the inequities in public education,” added Secretary-Treasurer Bill Graupp (North Marion SD).

The weekend meeting was the first presided over by President Sonja McKenzie (Parkrose SD) and marked the first meeting for newly elected Board members Ashley Carson Cottingham (Salem-Keizer) and Kraig Albright (Dayton).

On Friday, the Board also appointed Tj Johnson (Gaston School Board) and Osvaldo Avila (Salem-Keizer School Board) to the Legislative Policy Committee for terms ending Dec. 31, 2023. The LPC helps set OSBA’s legislative agenda and acts as a communications bridge between members and Salem.

OSBA is also looking for candidates to fill vacancies on the OSBA Board for position 7 (Clackamas) and LPC for position 7 (Clackamas). Potential candidates, who must serve on a member board in the Clackamas region, should contact Jane Leonhardt at

jleonhardt@osba.org.

Executive Director Jim Green also discussed his mid-year report and the Board’s strategic goals for 2023-24. Notably, OSBA is searching for a deputy executive director after Melissa Goff resigned to become Gov. Kotek’s education adviser.

The Board unanimously adopted its goals for 2023-24. By consensus, the Board also moved forward a proposal to explore the formation of a LGBTQIA2S+ advisory committee to the Board. Board Member Katrina Doughty (Multnomah ESD) made the proposal and spoke on its behalf.

“This is real,” Doughty said. “There are queer, trans and gender-fluid teachers and staff who want to be supported and heard...(if) we have their backs, it will help all of us be stronger.”

In a couple of unrelated conversations, Board members discussed the importance of promoting and paying attention to student voices.

“There’s really a movement around the country to elevate student voice,” McKenzie said. With school board elections approaching this May, the Board also heard a report about Get on Board (www.getonboardoregon.org), OSBA’s campaign to raise public awareness about the vital work performed by Oregon school board members.

Alex Pulaski, OSBA’s communications director, outlined materials available on the campaign website, including informational flyers in English and Spanish. OSBA’s Board Development staff has also planned an upcoming free webinar for prospective candidates on the power of diversity ([Webinars – Get on Board \(getonboardoregon.org\)](#)).

January 2023 NSBA Board meeting

I joined the first in-person NSBA Board meeting in Washington, DC. The meeting was a day-long meeting prior to the Equity Symposium and Advocacy Institute. I was able to meet with board members from across the country and learn about issues they hear from their regions. A few highlights I learned from my colleagues:

- There are rural school districts where students fly to their schools.
- Many school districts across the nation are navigating a rapidly changing political environment in their states that include discussions on issues such as students human rights, discussions of parental rights school vouchers, proposed restrictions to curriculum and lessons plans. These issues highlight the need to empower educators and school board members to advocate for students and their educational needs.

NSBA Delegates Assembly will meet in April to consider a few proposals from the Constitution and Bylaws Committee. Among these proposals is a redefinition of NSBA's Purpose Statement and language that expands NSBA's services reach to include all local school districts in the nation including school districts that are located in States where the State Association is no longer in good standing with OSBA.

Presenting a workshop on school board redesign at NSBA Equity Institute

I co-presented a workshop with Melissa Goff, Education Advisor to Oregon Governor-Elect Tina Kotek. The following is the description of the workshop and some takeaways.



Post-COVID Board Redesign: Seizing Opportunity to Diversify Board Leadership

The last few years in school districts have exhausted many individual board members to the extent that many are not running for re-election. The 2019 and 2021 elections in Oregon saw the lowest percentages of members running for re-election in two decades. What is lost in institutional knowledge may be counterbalanced by a possible gain in new members who provide representation for historically underseen and underrepresented communities. When equity-centered leaders join our school boards, superintendents and their teams are able to support all students through meaningful re-examination and design of systems, including finance, human resources, facilities, and other operations, in addition to teaching and learning. Come learn how to encourage and support diverse perspectives on our school boards while also building an understanding of systemic redesigns that may quickly better benefit all students.



Takeaways:

- We surveyed Oregon School Board Members of Color Caucus, about 25% of the membership responded to the survey.
- Attendees found the findings of the survey results resonate with their experiences.
- Some strategies and best practices were shared with the attendees. Among these best practices are the diversity statement Corvallis School Board uses in its interim position appointment Process announcement that we share when we have a vacancy. We also shared some best practices that OSBA and the Caucus of Color use to help board members from diverse backgrounds to run, serve, and stay in their local school boards.
- We were encouraged by the response from the workshop. We would love to share this presentation with any local board or community partners who would like to learn about this topic.
- Noteworthy presentations from the equity symposium and advocacy institute

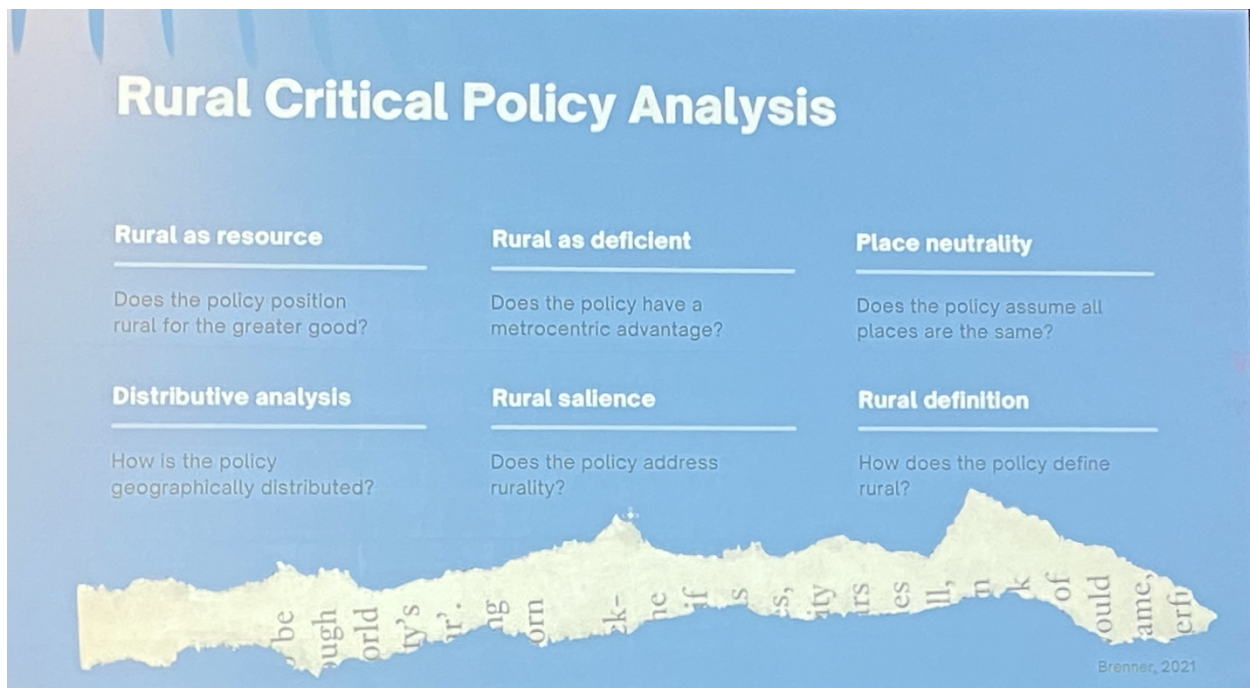
Highlight of other speakers and presentations

There were some great speakers during the Equity Symposium and Advocacy Institute. Among those:

- Freeman A. Hrabowski, III, Advocate for Science and Technology Education for African Americans. His work has placed a special emphasis on advancing the participation and performance of African American and other students underrepresented in STEM fields. OSBA hopes to invite Dr. Harbowski to present in an upcoming event in Oregon. Dr. Harbaowski keynote was about **Beating the Odds: Raising Academically Successful African American Males**

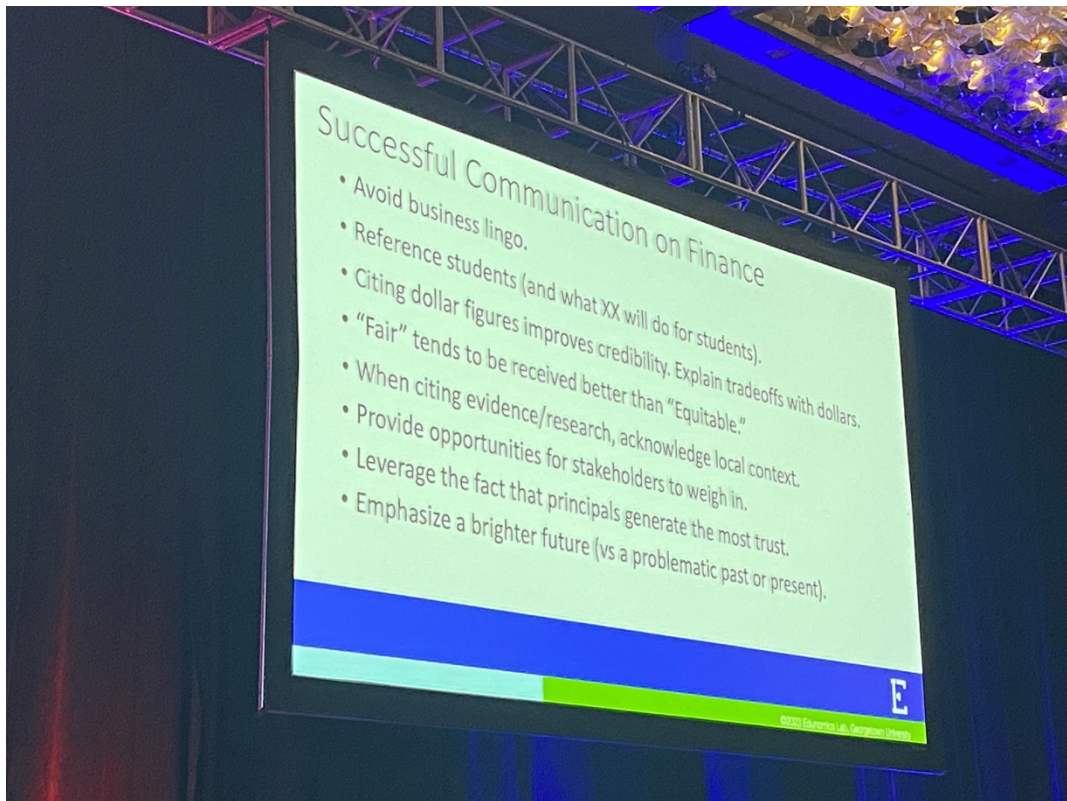


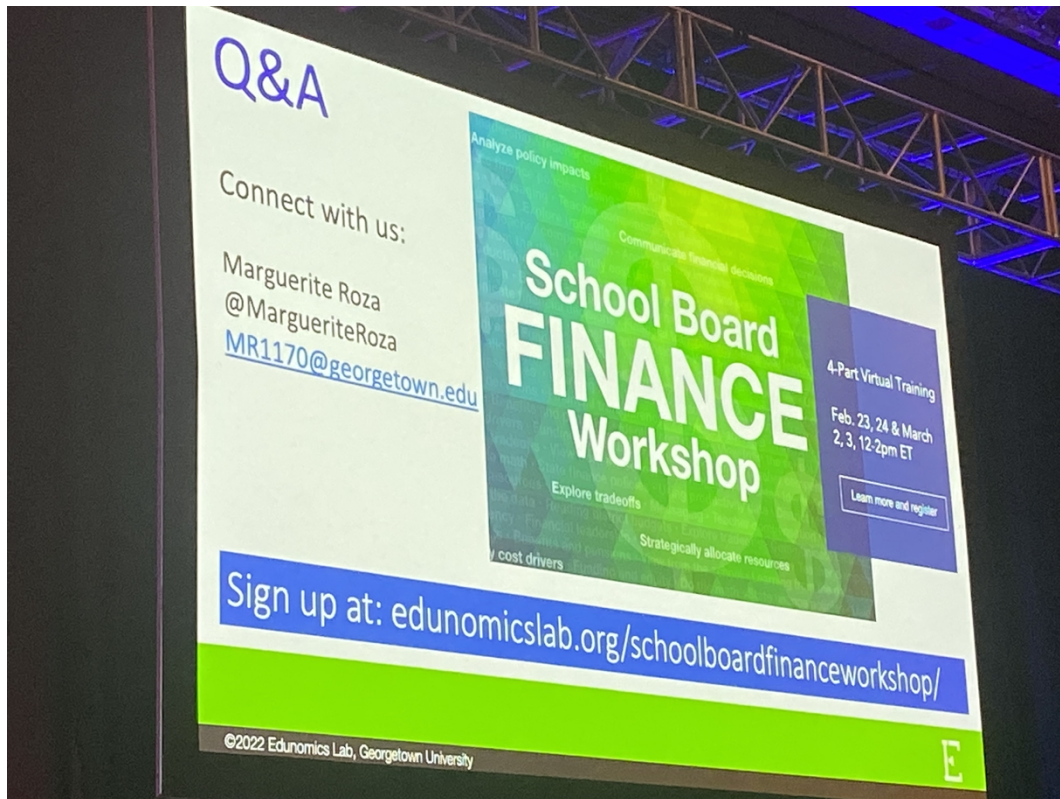
- Dr. Amy Price Azano, Founding Director, Virginia Tech Center for Rural Education. Dr. Azano spoke about her work on advocating for policies that considers the impact on rural communities. The following slide was presented a good sense that allows to ask good questions about how a policy impacts rural communities.



I found this is an interesting tool that school districts and state associations and agencies could consider in tandem with a racial equity lens to ensure that all students from all identities are positively impacted by policy proposals.

- Roberto J. Rodríguez, Assistant Secretary for Planning, Evaluation, and Policy Development at the U.S. Department of Education shared the educational policy priorities of the administration.
- Representative Robert C. “Bobby” Scott, Ranking Member, U.S. House Committee on Education and the Workforce Representative, Virginia’s 3rd Congressional District spoke to board members about topics under consideration in the legislative branch.
- Dr. Marguerite Roza @MargueriteRoza Research Professor at **Georgetown University** and Director @**EdunomicsLab** presented important highlights about the economic forecast that will impact education funding. She discussed national and state-specific drivers. She covered issues such as how sales taxes and state revenues impact states differently. She also highlighted how to successfully advocate for funding in education with community members and decision makers. Dr. Raza offers a workshop in School Board Finance. More details about it can be accessed from this link: <https://edunomicslab.org/schoolboardfinanceworkshop/>





Lobbying at the U.S. Senate and House

Main issues and priorities

The Oregon School Board members delegation joined their peers from across the nation in meeting with their elected representative at Capitol Hill. School Board members shared the the national federal priorities, among them:

- Ensuring that each classroom is staffed with a highly qualified teacher;
- Increasing broadband access and closing the homework gap;
- Providing support for historically disadvantaged students;
- Providing support for students with disabilities and mental health needs; and
- Addressing pandemic-related learning loss.

The Oregon School Board Members met with both U.S. Senators Wyden and Merkley, Members of Congress Rep. Blumenauer, Rep. Chavez-DeRemer, Rep. Hoyle, Rep. Bonamici, Rep. Bentz, and staff at Rep. Salinas office. Residents of Corvallis School District residing west of the Willamette River are represented by Congresswomen Val Hoyle and those residing east of the Willamette River are represented by Congresswomen Chavez-DeRemer. Members of Congress in the current 118th Congress (2023-2024) received their committee assignments earlier last week shortly before our meetings with members of Congress. During advocacy day meet with Senators Wyden and Merkley, Congresswomen Bonamici, Congresswomen Hoyle, and staff at Congresswomen's Salinas office.



Oregon school Board members shared accomplishments and progress from their districts and highlighted common priorities for Oregon schools which include advocating for learning recovery, mental health and behavioral health, continuing Covid-era funding, addressing staff shortage, and reauthorization of the Secure Rural Schools Act that expires in 2023. Oregon is the second largest recipient of funds from this act that provide funds to local Counties, Cities, School Districts that do not receive revenue from sustainable harvest of timber located in federal lands located in their jurisdictions.

Our meetings were very productive. Congresswomen Hoyle and Senators Wyden and Merkley encouraged us to share success stories and highlight opportunities for improvement. Among the priorities Senator Wyden highlighted is supporting progress in addressing behavioral and mental health in our communities. He also asked for school board members to share any information regarding school district-owned or developed housing for teachers. He expressed interest in learning about this phenomenon. He hopes that some action on housing production and affordability in Congress might spur from sharing more information about these opportunities and needs. This issues remains one of his biggest goals for this year. If you would like to share any information or stories about this subject, I will be happy to pass them on to the Senator's staff.

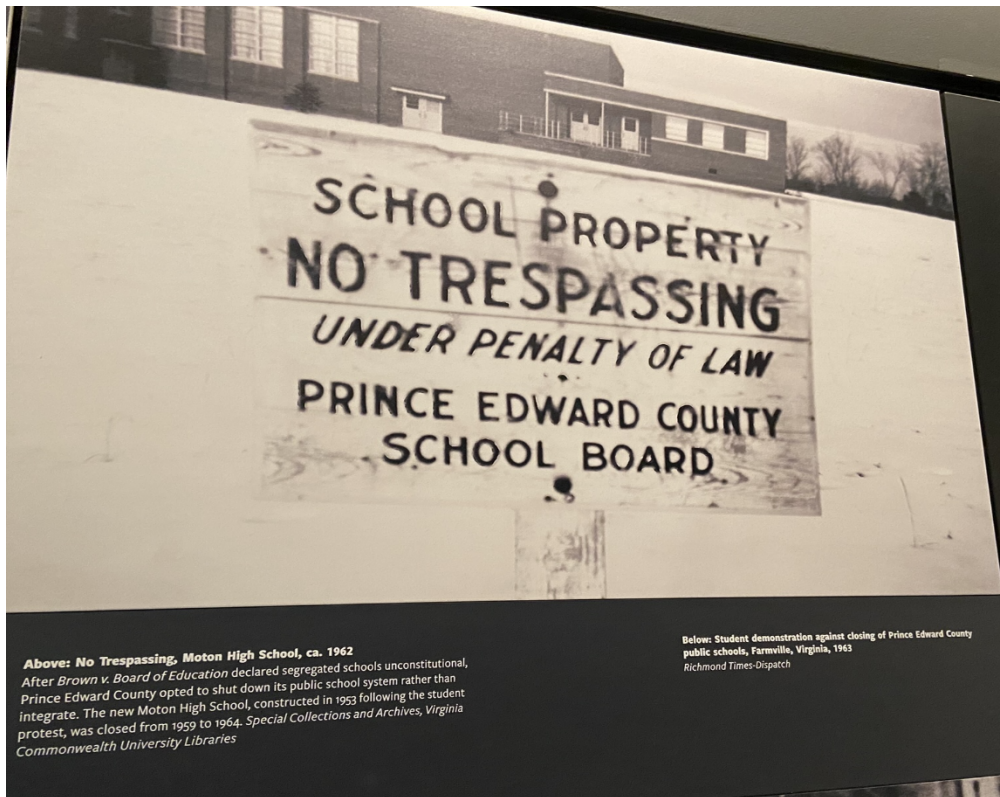


Takeaways and feedback

This was my first time to meet our elected officials at Capitol Hill. I am grateful for the support and feedback from community members, my colleagues at the school board, Superintendent Noss, and school board members from across the state. The feedback and stories they shared empowered me to advocate for Corvallis and Oregon students and their educators. During this visit I was able to share positive highlights from Corvallis and other Oregon's local districts. I was also able to advocate for systemic changes that are desperately needed to support Corvallis and Oregon's students.

In addition to attending board meetings, meeting with Members of Congress at Capital Hill, and attending and presenting at NSBA Equity Symposium and Advocacy Institute, I had time to visit the National Museum of African American History and Culture which is a Smithsonian Institution museum located on the National Mall in Washington, D.C. The visit was very informative and moving. I was reminded of the history of our country and the responsibility to actively work toward racial justice.

I want to share one takeaway that I found worthy of mentioning from my visit to the museum: Even when racially just laws are enacted or clarified such as Brown V. Board Education, local school boards continue to have the responsibility and the power of making important decisions that could impact racial equity. This photograph tells the story of when Brown v. Board of Education declared segregated schools unconstitutional, Prince Edward County decided to shut down its public school system instead of following the law and integrate.



Summary of possible follow up opportunities:

- Share the presentation and survey results regarding diversifying local school boards with community partners.
- Sign up for School Board Finance Workshop or suggest it as a workshop at an OSBA event.
- If you know any board members who qualify for OSBA Board for position 7 (Clackamas) and LPC for position 7 (Clackamas), encourage them to apply.
- Share the resources located in provided by Get on Board (www.getonboardoregon.org), OSBA's campaign, with community members who might be interested in serving in their school boards.
- Continue to share information, data, or stories with our members of Congress on any of the above priorities.
- Invite our members of Congress to visit programs on Career and Technical Learning, Addressing the housing crisis, behavioral and mental health.

Respectfully submitted,

Sami Al-Abdrabbuh, Ph.D.

Director - position #1 | Corvallis Board of Education

President-elect | Oregon School Board Association

Director - Pacific Region | National School Board Association (NSBA) Board of Directors

sami@corvallis.k12.or.us

V. SUPERINTENDENT'S REPORT



Corvallis

SCHOOL DISTRICT

Superintendent's Report

Shared with the Corvallis School Board during the February 9, 2023 meeting.

Release of Governor Kotek's Recommended Budget

Last week, Governor Kotek released her [proposed budget](#) for the 2023-25 biennium. I am encouraged by her prioritization of K-12 funding and other critical investments in early literacy, early learning, and summer learning for our K-12 students. The \$9.9 billion appropriation to the State School Fund (SSF) is an increase of \$400 million from the initial recommendation from the state budget office. Governor Kotek noted in her remarks to the press that the \$9.9 billion is a starting point for the discussion about K-12 funding during the Session.

This budget is an important framework to provide all students with consistent educational and mental health supports needed to recover from the pandemic's impacts, accelerate academically, and improve their well-being.

Corvallis Affordable Housing

A coalition of support has been growing to find additional avenues for affordable housing in Corvallis. You will hear one idea from the City of Corvallis this evening. In addition, I have been meeting with the Boys and Girls Club of Corvallis, Samaritan Health Services, Oregon State University, Old Mill Center for Children and Families, and additional non-profits in our community. I plan to continue to meet with this group and confirm support from the board that this work is important to our schools, families, and community.

Board Invitation to Tour Microshelter Construction

Following College Hill student school board representative Celia Frazier's report to the board on January 19, we've arranged for board members to be invited to tour the College Hill microshelters at Western View this Friday, February 10, from 10:15 - 11:45 am.

Art Exhibit at Benton County Kalapuya Building

At the end of April, Benton County's Kalapuya building will host the Corvallis School District all-levels art exhibit as part of their open house event. The exhibit will feature all the art class students in this exhibit with physical and digital pieces. For this event, we are exploring the possibility of students performing music, dance, or other artistic expressions.

This event is possible through the funds provided by the IMAGINE grant from the Corvallis Public Schools Foundation and the collaboration of Benton County. This grant will also support field trips for all the schools to visit the exhibit. Teachers will move the pieces to their schools in May for art night.

More information to come soon!

National School Counseling Week

National School Counseling Week is celebrated this week, February 6–10, 2023, to focus public attention on the unique contribution of professional school counselors. This week, we want to recognize our school counselors who, at every level, work to support students and their academic, social, and emotional needs. School counselors provide a unique perspective to the whole child.

Corvallis School District school counselors are a stabilizing force in each school community. There are currently 25 counselors that provide student support throughout the district, building relationships of trust and helping students navigate the process of change.

School counselors develop caring relationships with students and help connect students and their families to resources. Common needs in our schools include students and families seeking support to address school-based anxiety, family transitions including separation/divorce, bullying or conflict with other students, and problematic behavior patterns. Secondary school counselors also work with students with low school engagement and those who need guidance for post-secondary planning. Thank you to all of our dedicated counseling staff.

Bessie Coleman Renaming Celebration

On Thursday, February 16, from 4:00 pm to 5:00 pm, the Corvallis School District is hosting a community renaming celebration at Bessie Coleman Elementary. The event celebrates the school's renaming and a visit from Bessie Coleman's descendant, Gigi Coleman. Special guests at the event include members of the Linn Benton NAACP, Corvallis School District Equity Leadership Team Advisory (DELTA), Corvallis Public Schools Foundation, Evergreen Aviation Museum, and the Washington Museum of Flight.

U.S. Mint American Women Quarters™ Program Honors Bessie Coleman

In January, the United States Mint (Mint) began shipping the first coin in the 2023 [American Women Quarters™ \(AWQ\) Program](#). The annual program honors the achievements of women, demonstrating what can be possible with determination, perseverance, and the indomitable spirit of American women. The first coin of the 2023 American Women's Quarters™ Program honors the life and legacy of Bessie Coleman.

The Bessie Coleman quarters can be purchased on the [U.S. Mint website](#) and will go on sale on February 14, 2023.



UNITED STATES OF AMERICA · QUARTER DOLLAR
E PLURIBUS UNUM

BESSIE
CTC **COLEMAN** E
6.15.1921

VI. STUDENT REPRESENTATIVE REPORTS

VII. PUBLIC COMMENT (7:25 p.m.)*

NOTE: To indicate your desire to comment, please arrive several minutes before the meeting begins, and complete a request card; then, turn it into the Board Secretary before the meeting begins. See attached guidelines for providing input to the School Board.
Virtual option: Please contact kimberly.nelson@corvallis.k12.or.us by noon on the day of the Board Meeting to schedule public comment. Please include your name, address, the phone number you will call in from, and the topic of your public comment.



PROVIDING INPUT TO THE SCHOOL BOARD

(Revised 04-05-22)

The Corvallis School Board values the opinions and input of students, staff, parents, and community members. Comments may be provided during certain meetings, and via written correspondence, as outlined below.

Public Comment at School Board Meetings

This option is available when *Public Comment* is an item on the agenda. To offer comments:

- A. Complete all of the requested information on a “Comment Request” card, which can be found on a table near the entrance to the meeting room, and give it to the Board Secretary at the head table **before** the meeting begins. Your testimony may be delayed until all of the information is provided.
- B. When you provide public comment, your name, address, and comments are matters of public record; however, students and staff do not need to provide their addresses.
- C. Keep your comments within the specified time allotted, usually three minutes, to allow time for others to comment. Please be respectful of those who wish to provide comments after you.
- D. Direct your comments to the School Board. The Board Chair will refer questions or requests for action to staff for response at a later date.
- E. If you read from a prepared statement, you may choose to leave your written comments with the Board Secretary to post online with the informational packet of the meeting and to file with the official minutes of the meeting. Handouts are not required but should you wish to provide them, please bring 13 copies and give them to the Board Secretary to distribute.
- F. Speakers may offer objective criticism of District operations and programs but the Board will not hear complaints concerning individual District personnel.
 - Complaints shall be handled following the steps outlined in Board Policy KL and Administrative Regulation KL-AR, copies of which are available at meetings and online at <http://policy.osba.org/corvall/KL/index.asp>.
 - Complaints regarding budget, programs, or other District issues also should be handled by first following the steps outlined in policy KL.
- G. Undue interruption or other interference with the orderly conduct of Board business cannot be allowed.
 - Defamatory or abusive remarks are always out of order.
 - The Board Chair may terminate a speaker’s privilege of address if, after being called to order, the speaker persists in improper conduct or remarks.

Written Correspondence

Letters, emails, and other written materials submitted to the School Board are considered public record. They may be submitted via U.S. mail to: Corvallis School Board, 1555 SW 35th Street, Corvallis, OR 97333. Emails sent to: schoolboard@corvallis.k12.or.us, will reach all Board members as a group as well as the following District staff: Superintendent, Assistant Superintendent, Human Resources Director, Finance and Operations Director, Communications Coordinator, and Executive Assistant to the Superintendent and Board of Directors (also known as Board Secretary).

Telephone Calls

Vincent Adams	541-240-4055	Terese Jones	541-230-1673
Sami Al-Abdrabbuh	541-283-6611	Shauna Tominey	541-829-3411
Tina Baker	541-223-1997	Luhui Whitebear	541-632-3568
Sarah Finger McDonald	541-908-3756		

VIII. PROPERTY TAX EXEMPTIONS - HOUSING REPORT (7:45 p.m.)*



TO: 509 J Corvallis School Board
FROM: Brigetta Olson, City of Corvallis Housing and Neighborhood Services Manager
DATE: February 1, 2023
SUBJECT: Multi-Unit Property Tax Exemption (MUPTE) and Low Income Rental Housing Property Tax Exemption (LIRPTE)

Action Requested:

City Staff recommends the 509 J Corvallis School Board consider the Multi-Unit Property Tax Exemption (MUPTE) and Low Income Rental Housing Property Tax Exemption (LIRPTE) to increase housing supply in Corvallis. The exemptions would be approved only on a project by project basis. There would not be an outright exemption on any new development.

Discussion:

Property tax exemption programs

Corvallis is the most rent-burdened city in the state and needs a diversity of housing types to support the growing community. To support the development of additional housing, the City needs more tools in its toolbox. Property tax exemption programs are housing development tools, recommended by the Housing Development Task Force (HDTF) and the Housing Operational Committee. The City of Corvallis is considering the implementation of tax incentive programs including the Low Income Rental Housing Property Tax Exemption (LIRPTE) Program for nonprofits and for-project organizations, and the Multi-Unit Property Tax Exemption (MUPTE) Program. The information in this packet will provide additional technical details about these exemptions.

If these property tax exemptions are approved, they will not be “by right” but will serve as a tool that can be utilized on a **case-by-case basis**. If the project meets the necessary criteria **and** if the City Council agrees to approve the project’s application, then the application will be considered by other taxing districts such as the school district. If the project is approved by 51% of the taxing districts, a tax exemption would be granted.

The basic idea of a tax exemption program is to offer full or partial exemptions of property taxes for a determined time period in order to enable housing developments or certain aspects of a development (i.e. Affordable & low-income housing, energy efficiency features, etc.) that would not otherwise be financially feasible.

Why are property tax exemptions offered?

Property tax exemptions offer the following opportunities for future developments:

- Enable development on sites that would not otherwise be financially feasible due to extraordinary site costs such as environmental cleanup, demolition, replace aged infrastructure, etc.
- Allow rent or operating cost reduction for identified community priorities such as affordable housing that would not be otherwise financially feasible
- Incentivize the inclusion of extraordinary cost of building elements that further public priorities such as greenhouse gas reduction, seismic upgrade, historic preservation, complex ADA compliance, structured parking, etc. that would not be otherwise feasible

Property tax exemptions will be carefully evaluated and monitored and ultimately serve the public interest. Under existing state law there are several property tax exemption programs that cities may put in place to provide incentives for the development of specific housing types.

Types of Property Tax Exemptions

Below are the three property tax exemptions that City staff recommend be moved forward for consideration. The Corvallis City Council held two Work Sessions on December 16, 2022 and January 19, 2023 to consider these exemptions, and may adopt them in early 2023.

Low Income Rental Housing Property Tax Exemption (LIRPTE) Program

The Low Income Rental Housing Property Tax Exemption (LIRPTE) Program provides an exemption for low income rental properties. This tool could be used to demonstrate local support for projects being submitted to the state for Low Income Housing Tax Credits and other assistance allocated by the Oregon Housing and Community Services Department.

In 1985, the Oregon legislature authorized a property tax exemption for low-income housing held by charitable, nonprofit organizations (ORS 307.540). Under the nonprofit exemption, an annual exemption application must be submitted to the city for review. If approved, a 100% exemption can be authorized, to be in effect as long as the criteria is met by applicant. A renewal application must be submitted every year in order to maintain exemption.

In addition, in 1989, the legislature authorized a property tax exemption for low-income designated housing held by for-profit developers (ORS 307.515). Under the for-profit exemption, annual application isn't required, but an annual report of compliance will be. The for-profit exemption can extend for twenty (20) years if compliance is maintained and can be renewed if the City approves. The HDTF did not include the for-profit exemption in their recommendations, but staff recommend including this exemption for consideration as for-profit developers often have the capacity to provide more affordable housing than non-profits can provide alone.

These tax exemptions will benefit low-income renters by alleviating the property tax burden on those agencies that provide this housing opportunity. Properties must provide housing opportunity limited at sixty (60) percent of the area median income (AMI) or less or averaged at 60% AMI for nonprofits.

Affordable housing projects already in existence will **not** be eligible for LIRPTE as the focus of this exemption would be to increase housing in Corvallis. Staff is recommending that projects located within the bounds of the Urban Renewal district would not qualify.

The Multi-Unit Property Tax Exemption (MUPTE) Program

The MUPTE program is a state-enabled program designed to be an incentive for construction and redevelopment of residential properties in city centers and along mixed-use commercial areas. This tool offers a property tax exemption on a new structure or the incremental change in the after-rehabilitation property value of a building for a maximum of 10 years. The MUPTE can shift a proposed housing development to being financially feasible. The exemption only applies to the structure meeting the criteria for the program and therefore the physical land itself still continues to generate taxes during the exemption period.

The MUPTE exemption was passed by the Oregon legislature in 1975 to incentivize and encourage the development of affordable housing by for-profit developers. It was initially created to promote density in urban cores, but later expanded to also promote multi-unit housing (ORS 307.600). For this exemption to apply, the property must include at least two units (City of Corvallis recommends 4) and the exemption is limited to up to ten (10) years. The proposed project will also be reviewed by an independent outside financial consultant who will evaluate the project's financial pro-forma to help determine need of exemption.

By adopting these tools, this community would be joining a multitude of other Oregon cities and counties that have already implemented these property tax exemptions to increase housing supply. Staff recommend that projects located within the bounds of the Urban Renewal district not qualify for this exemption program as the Urban Renewal District can accomplish many similar impacts.

City Staff recommend this tool be allowed in the following areas in the City of Corvallis.

- Commercial Mixed Use 2 and 3.
- a portion of the CMU-1 Zone that is located north of Monroe Avenue, East of 26th Street, South of Van Buren Avenue and West of 14th Street
- RMU-20 (Note: Areas zoned RS – 20 may also be rezoned to RMU – 20)

Although projects under this tax exemption are not required to include affordable housing, the program does allow cities to require that projects that do not include affordable housing will provide a fee towards the construction of affordable housing elsewhere. City Staff is recommending that Corvallis include an affordable housing fee requirement if MUPTE is adopted.

Multi-Unit Property Tax Exemption Public Benefits

Criteria below will be used by City staff to evaluate future developments that are applying for the MUPTE tax exemptions. Staff have reached out to other municipalities to better understand the public benefits offered and are making a recommendation to include the following public benefit categories:

- Additional Support for Affordable Housing
- Abandoned, vacant or underdeveloped properties

- Public Infrastructure
- Placemaking or Active Public Spaces
- High Quality Urban Design/ Special Architectural Features
- Sustainable Building and Climate Mindfulness
- Local Labor, Materials, or Ownership
- Economic Opportunities
- Economic Catalytic Effect
- Retrofitting existing buildings
- Connectivity Improvements

These guidelines will serve as points of evaluation on applications submitted for projects seeking the MUPTE exemption. Staff recommend that developers must have at least one substantial public benefit or three benefits, along with a demonstrated financial need, approval of 51% of the taxing districts to receive the exemption.

By adopting these tools, Corvallis would be joining a multitude of other Oregon cities that have already implemented these policies to increase housing in their own communities.

Agreement with other taxing districts

In order to qualify for exemptions, there is a requirement that at least 51% of the taxing districts must agree on each individual project. For each project that applies for MUPTE/ LIRPTE, there will be an initial screening and multiple review levels before the project is deemed viable and in compliance with the program’s parameters. After that step, there will still need to be support from taxing authorities (including Corvallis) that total 51% of the taxing capacity before the resolution granting the exemption can be approved.

Division of the Taxing Districts:

- 46.2%- Schools (includes LBCC and Corvallis School District)
 - 88% 509J
 - 7.5% LBCC
 - 4.5% Linn Benton Lincoln ESD
- 32.5%- City of Corvallis
- 16.2%- Benton County
- 5.1%- Special Districts (911, Extension, Library, Soil & Water)

Staff has had initial conversations with leadership at the Corvallis School District and Benton County. During the month of January and early February, City staff will connect with taxing districts to discuss these possible exemption programs.

Process to review and approve applications:

When a project comes forward seeking MUPTE or LIRPTE funding, the sequence of events would be similar to the following:

1. Application will be filed with the City Manager (delegated to the Housing and Neighborhood Services Division - HNS) along with the application fee.
2. Application will be reviewed by HNS staff for initial screening to ensure all requirements have been met, and to determine if the application complies with existing policy direction and applicable standards.
3. If #2 is satisfied then the project is reviewed by an independent outside professional financial consultant who will review the project's financial pro-forma, the cost of which is covered by the applicant's application fee.
4. If #3 is satisfied then the project would come to the City Council at a regular business meeting.
5. If Council recommends moving forward, City staff will reach out to other taxing districts such as Benton County/509J.
6. The Council will review staff's findings regarding the recommendations of the other taxing districts, and if approved, adopt a resolution stating so and granting the property tax exemption. Depending on how the project came before the Council, the Council action could be the final approval or could be conditional if additional taxing authority approvals were needed to cross the 51% threshold. Of course, the Council is under no obligation to provide the benefit to any applicant and can adopt a resolution disapproving the application and denying the application.

For approval or denial of applications, the statute, [ORS 307.621](#) merely dictates the timeline and process for approving or denying applications (no longer than 135 days between submission of application and brought to Council for approval or disapproval). If the application is brought to Council but Council fails to approve or disapprove within 180 days from the date it was filed, the application shall be deemed approved and processed.

[ORS 307.618](#) outlines some requirements for approving applications for MUPTE projects such as the application must describe the property, explain grounds for requesting the exemption, and be verified by oath and affirmation. The application must be made on or before February 1 of the first assessment year for which they are requesting the exemption and the application fee must be submitted with the application. The public benefit elements must be outlined in the application, the description of the project must prove that it will be in conformance with all local plans and planning regulations, etc. If being utilized in part as affordable housing for low income households, it must be described in the application how this project would not be possible without the exemption.

There is also a process for terminating the exemptions if found to be out of compliance which is detailed in [ORS 307.621](#) and [624](#). Monitoring for compliance will be conducted by the Housing

and Neighborhood Services Division at the City and is in alignment with other HUD compliance activities the Housing Division participates in, on an annual basis.

Budget Impact:

There is no budget impact for the creation of these programs.

When projects come forward, there will be budget impacts that are unknown at present, but will be discussed with each application put before the Council.

For the LIRPTE program, there could be long term property tax revenue lost, but an important public benefit gained. For-profit owners of LIRPTE projects receive the benefit for 20 years. Nonprofit owners of LIRPTE projects are eligible for an annual renewal.

The MUPTE program will incentivize future development and the taxing districts will still see the base tax, prior to development (property tax will still be continuously assessed and paid on the land and any development on the land that isn't a part of the MUPTE tax exemption). The increased value of the development will be fully realized at year 11.

The MUPTE program also has the flexibility of tailoring the exemption to the project. The exemption can be given *up* to 10 years, but it can be awarded for fewer years and the exemption does not have to grant a 100% tax exemption.

Attachments:

Attachment A: MUPTE and LIRPTE FAQ

Attachment B: Overview Table of Tax Exemption Programs

Attachment C: MUPTE DRAFT Ordinance

Attachment D: LIRPTE DRAFT Ordinance



**Community Development Department
Housing and Neighborhood Services Division**

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Who is eligible for these Property Tax Exemptions?

These property tax exemption programs are a tool that would be used by developers to increase housing supply in our community. Single family properties **would not** be eligible to receive these exemptions.

What is the Multi-Unit Property Tax Exemption (MUPTE)?

It is a state-enabled program designed to be an incentive of redevelopment of residential properties in city centers and along transit corridors. In Corvallis, the City is considering utilizing the MUPTE the new Commercial Mixed Use zones CMU-1 (The portion of the CMU-1 Zone that is located north of Monroe Avenue, East of 26th Street, South of Van Buren Avenue and West of 14th Street), CMU-2, and CMU-3 as well as RMU-20 (Areas zoned RS – 20 may also be rezoned to RMU – 20). MUPTE allows new multi-family units (2 or more units) to avoid property taxes on the value of new residential construction for up to 10 years. The property continues to pay taxes on the land value and any commercial portion of the property.

How does MUPTE support multi-unit residential development?

The intent of MUPTE is to lower operating costs in the early years of a housing development so that it becomes financially feasible. In a housing market like Corvallis, market rents are similar to larger metropolitan areas, and the cost of construction is just as high. Developing housing in the downtown core is expensive and often new residential development does not ‘pencil out’, so new residences in the downtown core do not get built. It is more expensive to build downtown than on undeveloped sites on the edge of town, because it is more complicated to build in an existing neighborhood where there is less elbow room to store construction materials.

How does the City determine if a housing project can receive a MUPTE?

In order to receive MUPTE, a developer must show the expected costs and revenues (a pro forma analysis) and their expected return on investment. City staff / consultants review the analysis, compare the rents, construction costs, and other factors to current market conditions. The tax exemption is only given to projects that show their development does not pencil out *but for* the exemption. When applications come forward, staff will initially review, then there will be an independent third party financial review for each application, a consultation with the taxing districts if it passes the first levels of scrutiny, and then final Council approval.

Why should the City of Corvallis support dense housing in the Commercial Mixed Use zones?

The City’s 20-year growth management plan, known as Imagine Corvallis 2040, shows that Corvallis must redevelop land inside our urban growth boundary if we do not want to expand the boundary. The expected demand for housing inside the existing boundary will need to be built somewhere. By encouraging growth in the Commercial Mixed Use areas, we can reduce development pressure on farmland at the edges of the community.

A high priority action item within the *Corvallis Climate and Energy Action Plan* is to increase

density around the urban core and along high-capacity transit corridors. National data shows that individuals living in city centers drive, on average, fewer miles than individuals in other parts of a community. Downtown is walkable, has good access to transit, and offers goods and services for residents' daily needs. More residents in the downtown will result in lower per capita carbon emissions and other automobile emissions (including carbon monoxide, nitrogen oxides, sulfur oxide, and particulate matter).

Housing in the downtown core also positively affects the economic activity in the city center. For example, new residents in the downtown support local businesses because they increase demand for nearby goods and services. Also, an occupied building creates an active use, which enhances the overall vibrancy of the downtown.

Can MUPTE support affordable housing?

To understand if MUPTE would be a useful tool for affordable housing, one should understand how affordable housing is developed.

There are other tools the City of Corvallis is considering adopting to support the development of affordable (subsidized) housing, including the LIRPTE (Low Income Rental Housing Property Tax Exemption) program. Like MUPTE, it offers a property tax exemption for the value of the new housing construction, but over a 20-year period.

Over the past several decades, the City has invested in hundreds of units of affordable housing created through partnering with agencies such as DevNW and Corvallis Housing First. These units are only available to individuals and families typically earning less than 60% of area median income, and the below-market rents typically apply to 100% of the units.

There are currently 338 units of affordable housing that will be coming online in the next several years.

To compare MUPTE to existing affordable tools, consider a new apartment complex with 300 units. If 30% are rent-restricted, there will be 90 affordable units. They will maintain affordable rents for 10 years, creating 900 unit-years of affordable housing.

Compare that to a new affordable housing development with 90 units. Those units must maintain their affordable rents for 50 years, so the 90 new units would create 4,500 unit-years. Over the long term, existing affordable housing tools create many more units of affordable housing. Not only do the rents remain affordable for a 50-year period, residents typically receive support services related to job skills, employment opportunities, and health.

Does MUPTE cause the City to reduce its tax revenue?

The exemption has the ability to make a project financially feasible. If it is not financially feasible, it does not get built, so the City and other taxing jurisdictions never gain the tax revenue. With the exemption, they get the tax revenue after 10 years while still collecting tax revenue for any part of the property not included in the development project. The exemption can make a housing development financially feasible, and the City grows its tax base in the long term. Because MUPTE encourages development in the downtown core, the City is able to more efficiently provide services than in less dense parts of the community. Dense development requires less pavement, less sewer line, and less water line than in low density areas. The City generates more tax revenue per acre and spends less per acre.

How effective has MUPTE been in other communities?

In Eugene, since 1978, the program has supported the development of about 1,500 units in the city center. No housing has been built in the downtown core without MUPTE or some other property tax exemption for at least two decades. MUPTE has been essential to building density in the core.

In Salem, since their implementation of the program in 2012, 706 units have been built in their designated core area.

Will MUPTE be approved for all areas of Corvallis?

At this time, staff are recommending that MUPTE not be eligible as an option in South Corvallis' Urban Renewal District.

What is the Low Income Rental Housing Property Tax Exemption (LIRPTE)

It is a state-enabled program designed to be an incentive of redevelopment of residential properties for affordable housing. In Corvallis, the City is considering utilizing the LIRPTE throughout the city. LIRPTE allows affordable housing units (4 or more units) to avoid property taxes on the value of new residential construction for up to 20 years if the developer is a for-profit organization and indefinitely if the developer is a nonprofit organization, provided that they apply for the exemption every year and the criteria is met. A for-profit organization would apply once and if approved, receive the exemption for 20 years, though reporting would be required every year to ensure all criteria was being continuously met. The property continues to pay taxes on the land value and any commercial portion of the property that is not a part of the development.

Non-Profit Low Income Rental Housing Property Tax Exemption	For-Profit Low Income Rental Housing Property Tax Exemption
STATE STATUTE	STATE STATUTE
ORS 307.540	ORS 307.515
WHAT IT IS:	WHAT IT IS:
A local option property tax exemption incentivizing nonprofit corporations to develop affordable housing opportunities by assisting them in making those development financially feasible	A local option property tax exemption incentivizing for-profit developers to build affordable housing opportunities by assisting them in making those developments financially feasible.
AMI REQUIREMENTS:	AMI REQUIREMENTS:
AMI: 60% the first year, local government may choose to allow eligible income rise to 80% after first year of occupancy	AMI: Limited to persons at 60% AMI with no increase after the first year of occupancy.
WHAT QUALIFIES:	WHAT QUALIFIES:
Can be existing housing, new construction or land held for development.	For-Profit: Housing must be constructed after the city adopts the authorizing ordinance to be eligible. Non-Profit: Housing can be existing housing, not just new construction. For both, land being held for development is eligible.
CAN BE OWNED BY:	CAN BE OWNED BY:
Must be owned by 501(c)(3) or (4) charitable corporation. Includes tax credit partnerships.	Owners can be anyone as long as the rents charged reflect the property tax exemptions savings.
# OF REQUIRED UNITS:	# OF REQUIRED UNITS:
No required minimum units in statute	No required minimum units in statute
LENGTH OF EXEMPTION:	LENGTH OF EXEMPTION:
Length of Exemption: No limit as long as exemption criteria is met.	Length of Exemption: 20 years, though it can be renewed.
APPLICATION AND RENEWAL:	APPLICATION AND RENEWAL:
Application and Renewal: Annual application is required but no limit on length of exemption if criteria is met.	Application and Renewal: Initial application required, but not thereafter (although local government should monitor compliance) Limited to 20 years, although can be renewed.
ADDITIONS:	ADDITIONS:
Local government can (and often does) add additional criteria that are not inconsistent with the state-mandated criteria for exemption.	Local government can (and often does) add additional criteria that are not inconsistent with the state-mandated criteria for exemption.
OREGON CITIES USING EXEMPTION:	OREGON CITIES USING EXEMPTION:
Other Oregon Cities Utilizing This Exemption: Bend (2022), Eugene (2011), Salem (2018), Albany (2014), Portland (2016), Beaverton (2013), Forest Grove (2018), Cornelius (2015), Tigard (2019), Wilsonville (2012)	Other Oregon Cities Utilizing This Exemption: Bend (2003), Eugene (2011), Springfield (2018), Deschutes County (2016), Wilsonville (2012)

Multi-Unit Property Tax Exemption
STATE STATUTE
ORS 307.600
WHAT IT IS:
A local option property tax exemption incentivizing for-profit developers to build market rate housing while supporting the development of affordable housing opportunities by assisting them in making those developments financially feasible. Initially created to promote density in urban cores, later expanded to also promote multiple-unit housing promoting transit. Not tied to creation of affordable housing, although a city may choose to use it for affordable housing as other Oregon cities do. (Portland and Eugene).
AMI REQUIREMENTS:
Subject to a "low income housing assistance contract": Either offering units at lower AMI or paying a fee that will contribute to the development of affordable housing in Corvallis.
WHAT QUALIFIES:
Multiple-unit redevelopment housing projects with two or more units that are newly constructed, additions to existing multi-unit housing, or structures converted in whole or in part from other use to dwelling units are eligible for MUPTE. The exemption is for 10 successive years and may include parking constructed as part of the multiple-unit housing construction addition or conversion, commercial property to the extent that the commercial property is a required design or public land benefit element of a multiple-unit housing construction, addition or conversion. In the case of a structure to which stories or other improvements are added or a structure that is converted in whole or in part from other use to dwelling unit, only the increase in value attributable to the addition or conversion may be exempt from taxation (ORS 307.612)
CAN BE OWNED BY:
No restrictions on who can own it.
OF REQUIRED UNITS:
Must be at least 2 units.
LENGTH OF EXEMPTION:
Length of Exemption: Up to 10 years, exemption is for improvements/construction/housing only.
APPLICATION AND RENEWAL:
Application and Renewal: Initial application required. Not eligible for renewal.
ADDITIONS:
Local government can (and often does) add additional criteria that are not inconsistent with the state-mandated criteria for exemption.
OREGON CITIES USING EXEMPTION:
Other Oregon Cities Utilizing This Exemption: Bend (2022), Eugene (2015), Salem (2012), Portland (2012), Beaverton (2021), Cottage Grove (2019), Newport (2018)

ORDINANCE 2023-__

AN ORDINANCE RELATING TO A MULTIPLE-UNIT PROPERTY TAX EXEMPTION ENACTING NEW MUNICIPAL CODE CHAPTER __, “MULTIPLE-UNIT PROPERTY TAX EXEMPTION”

THE CITY OF CORVALLIS ORDAINS AS FOLLOWS:

Section 1. Municipal Code Section [REDACTED] is hereby enacted as fully set out in Exhibit A to this Ordinance, which is attached and incorporated as part of this ordinance.

MULTIPLE-UNIT PROPERTY TAX EXEMPTION (MUPTE)

1) The provisions of ORS [307.600 to 307.637](#) enable cities to grant local property tax exemptions for multiple-unit housing located in areas designated by the city. There is a need and demand for better housing at rental rates or sale prices accessible to a broad range of the general public in the core and transit oriented areas which is not likely to be produced without this incentive. This incentive is intended to:

- (a) Stimulate the construction of transit supportive multiple-unit housing in the city’s designated areas to improve the balance between the residential and commercial nature of those areas, and to ensure full-time use of the areas as places where citizens of the community have an opportunity to live as well as work;
- (b) Encourage the development of vacant or under-utilized sites in city’s designated areas, rather than sites where sound or re-habitable multiple-unit housing exists;
- (c) Encourage the development of multiple-unit housing, with or without parking, in structures that include ground level commercial space;
- (d) Encourage the development of multiple-unit housing, with or without parking, on sites with existing single-story commercial structures;
- (e) Encourage the development of multiple-unit housing, with or without parking, on existing surface parking lots; and
- (f) Preserve existing publicly assisted housing that is affordable to low income persons by providing the incentives authorized in [ORS 307.600 to 307.637](#) to existing multiple-unit housing that is subject to a low income housing assistance contract with an agency or subdivision of this state or the United States.

(2) The provisions of ORS [307.600 to 307.637](#) are hereby adopted as the city’s multiple-unit housing property tax exemption program.

(3) Applications for property tax exemption hereunder shall be filed with the city manager and shall be accompanied by an application fee.

(4) Following receipt of a completed application, the city manager shall retain an independent, outside consultant to review the project’s financial pro-forma, with the costs of that review to be paid for by the applicant. The consultant shall make a recommendation to staff regarding the financial feasibility and financial need of the proposed project. Based on the financial analysis provided by the consultant and an evaluation of the public benefits and other requirements, staff will determine whether the application

meets the criteria for the MUPTE program, and provide any other comments about the project's financial projections. Staff will also coordinate with other taxing districts to gain their support and approval. After the city manager receives staff's recommendation and comments, but in no event later than 135 days following submission of the application, the city manager shall provide the Council with the city manager's recommendation on the application, and shall provide to the Council the independent consultant's conclusions.

(5) Upon receipt of the city manager's written recommendation on an application, the Council shall consider the application, the city manager's written recommendation, and any written comments submitted on the application. If the Council fails to act on an application within 180 days from the date it was filed, the application shall be deemed approved and processed thereafter in accordance with subsection (10) of this section. [[ORS 307.621](#)]

(6) At the meeting at which the city manager's recommendation on an application is considered, or at a subsequent meeting, the Council shall adopt a resolution approving the application and granting the property tax exemption, or adopt a resolution disapproving the application and denying the property tax exemption.

(7) The Council shall review the application and a resolution will be adopted either approving or denying it. The resolution approving the exemption shall set forth any specific conditions of approval. The exemption may not include the land or any improvements not a part of the multiple-unit housing. The exemption may include parking constructed as part of the multiple-unit housing construction, addition or conversion, and commercial property to the extent that the commercial property is a required design or public benefit element of a multiple-unit housing construction, addition or conversion approved by the city. In the case of a structure to which stories or other improvements are added or a structure that is converted in whole or in part from other use to dwelling units, only the increase in value attributable to the addition or conversion may be exempt from taxation.

(8) If the Council determines that one or more of the criteria in this code are not met, the Council shall deny the application. The resolution denying an application shall set forth the specific reasons for denial.

(9) The city manager shall forward to the applicant a copy of the resolution adopted by the Council within 10 days from the date the Council acts on the application. In addition, following approval, the city manager shall file with the county assessor a copy of the resolution approving or denying an application.

(10) With respect to an application deemed approved through inaction of the Council under subsection (5) of this section, following the expiration of the 180 day period, the city manager shall file with the county assessor an administrative order containing the same findings and information as required to be set forth in a resolution approving an application and forward a copy thereof to the applicant.

(11) In the case of a structure to which stories or other improvements are added or a structure that is converted in whole or in part from other use to dwelling units, only the increase in value attributable to the addition or conversion may be exempt from taxation.

(12) Review of each application will be completed by City staff and an independent, outside consultant.

(a) The review process shall consist of:

1. Reviewing project applications, including compliance with the criteria contained in ordinance per [ORS 307.600 to 307.637](#) and the independent outside consultant's review of the pro forma as described in subsection (4);

2. Midway through construction, upon completion of construction, and during the tax exemption period, City staff will review an approved project's compliance with the requirements of this code, and the resolution approving the tax exemption; and
3. Assist the city manager in preparing annual reports to the Council on the progress that will also include information about the program volume cap and review of the documentation required in this code.

Multiple-Unit Housing – Threshold Criteria and Public Benefits.

This section was recently amended by Ordinance No. XXX, codified in December XXX.

(1) Boundaries.

(a) Sections _____ of this code shall initially apply only to the property that is:

1. CMU-1 – The portion of the CMU-1 Zone that is located north of Monroe Avenue, East of 26th Street, South of Van Buren Avenue and West of 14th Street.
2. CMU-2
3. CMU-3
4. RMU-20 (Note: Areas zoned RS – 20 may also be rezoned to RMU – 20)

(b) The Council may expand the boundaries covered by section (a) of this code to include additional areas upon City Council's approval of:

1. Amendments to this code that require a percentage of the units in an approved tax exemption project must be affordable housing which is defined as renters earning sixty (60) percent or below the area median income as defined by the Department of Housing and Urban Development. Or, the developer must make a commensurate "in-lieu of" payment to the city that is based on affordable housing rental rates, and that those payments shall be used to facilitate or develop affordable housing; and
2. Refinement plan policies that specifically provide for multiple-family and mixed use projects within that area, and that those policies are acknowledged pursuant to ORS 197.625.

The areas that the Council may approve pursuant to this subsection are:

(2) Criteria for Approval. No exemption may be approved under this code unless all of the following criteria are met:

- (a) Eligible Project Types. The project will provide multiple-unit housing of four or more new units through new construction, an addition to an existing structure, or a conversion of a structure from another use to dwelling units.
- (b) Project Need. The proposal could not financially be built "but for" the tax exemption. The burden is on the applicant to demonstrate that absent the exemption, the project would not be financially viable.
- (c) Affordability Levels
 1. The applicant has proposed that at least 15% of project's units to be affordable for households earning 80% of the average median income in Corvallis. OR;

2. The applicant agrees that 10% of the total property tax exemption will annually be paid to a fund for the future development of affordable housing.

(d) Unit Type and Size

1. Each application must include a breakdown of the number of units by each type (studio, 1 bedroom, 2 bedroom, 3 bedroom, 4 bedroom)

2. The application must also include the square footage of each unit type and note which units will be affordable (if applicable).

(e) Timeframe of Affordability

1. If the applicant is proposing a project utilizing affordability as the claimed public benefit, the applicant must agree to a minimum of 30 years of affordability and they must provide a detailed description of how they will maintain that level of affordability for twenty years after the tax exemption period has ended.

(f) Ratio

1. The applicant must state in the application the ratio of proposed public funds, private funds and the percentage of funding the multiple-unit property tax exemption (MUPTE) investment would represent.

(g) Gap

1. The applicant must state in the application what the fiscal need is in order to make this project feasible.

(h) Strength of Partner

1. In the application, the applicant must include a detailed description verifying that they have the legal and financial capacity to complete the project.

2. In the application, the applicant must provide proof that they have prior project experience that is comparable in scale to the proposed project or partnerships with other entities that have the relevant experience.

(i) First Floor must be Non-Residential

1. In order to qualify for the multiple-unit property tax exemption (MUPTE) program, an applicant must describe what uses the first floor of the development will be utilized for.

A further requirement for any application seeking approval for the multiple-unit property tax exemption (MUPTE) program must provide either one substantial public benefit, or at least three (3) sizeable public benefits from (j) to (t) in this section.

(j) Additional Support for Affordable Housing

1. The applicant must include in their application a detailed plan of how they will be giving additional support for affordable housing in the area either through a substantial increase in the fee for development being paid or in the number of affordable units being developed.

- (k) Abandoned, Vacant, or Underdeveloped Properties
 - 1. The applicant must include in their application a detailed description of how this project will be remediating a severely blighted building or property.
 - a. A project is characterized as blight due to obsolescence, deterioration, dilapidation, shifting of uses, or presence of brownfields.
- (l) Public Infrastructure
 - 1. The project may also advance priority public infrastructure projects as identified in the City of Corvallis' master plans, Capital Improvement Plan (CIP), or Strategic Operational Plan (SOP), with an investment of at least \$100,000.
- (m) Placemaking or Active Public Spaces
 - 1. The project provides amenities beyond City standards such as shared community space, public plazas, green space as the centerpiece of the development, active frontage, art, wayfinding, pedestrian-oriented design features, common meeting rooms, or spaces meant for people to spend ample time and build community.
- (n) High Quality Urban Design/ Special Architectural Features
 - 1. The development provides high quality landscaping and architecture and/or other elements beyond what the City of Corvallis currently requires.
 - 2. The development may include special architectural features; use of extraordinary materials or restoration of missing historic features based on photographic or physical evidence
- (o) Sustainable Building and Climate Mindfulness
 - 1. The development is built using sustainable practices such as LEED, Earth Advantage, Oregon's Reach Code or similar green building program (with staff approval), or goes above and beyond building codes for energy efficiency and sustainability, alternative energy, green captures, etc. can also be considered.
- (p) Local Labor, Materials, or Ownership
 - 1. Significant components of the project will be locally sourced/ utilized.
- (q) Economic Opportunities
 - 1. The project will work with contractors and/or companies that are owned by disadvantaged, minority women, or service disabled individuals, or an emerging small business.
- (r) Economic Catalytic Effect
 - 1. The project will include spaces that have an economic catalytic effect that will be of bigger benefit to the community than a small set of individuals.
- (s) Retrofitting Existing Buildings

1. The project will involve retrofitting an existing building with seismic upgrades, ADA improvements above and beyond code, sprinkler installations, or improving a designated historic building.

(t) Connectivity Improvements

1. The project will include additional non-required connectivity developments including paths, roads, etc.

(3) Additional and On-Going Obligations of Project Approved for Exemption.

(a) Following approval of an exemption under this code, the city manager shall monitor the development of the project to ensure that the project complies with the requirements of this code, including the provision related to affordable housing, the administrative rules adopted pursuant to this code, and any other conditions of approval of the exemption.

(b) During the exemption period, the project's owner must annually submit documentation to evaluate compliance with affordable housing requirements, unless the project's owner is paying the equivalent affordable housing fee or is exempt pursuant to terms of the exemption.

Multiple-Unit Housing – Termination of Approval, Review.

(1) Except as provided in subsection (8) of this section, after a resolution approving an application has been filed, if the city manager finds that:

(a) Construction of multiple-unit housing was not completed within the time specified in the resolution, and no extensions as provided in subsection (5) hereof have been granted, or

(b) The applicant, developer or other owner of the project has failed to comply with the provisions of ORS 307.600 to 307.637 or the provisions of this code or administrative rules adopted thereunder, or

(c) The applicant, developer or other owner of the project has failed to comply with any conditions imposed in the resolution approving the application and the city manager has not determined in writing that project design deviations provide the same or greater degree of adherence to the design principles that Council approved for the project, or

(d) Construction of multiple-unit housing was not completed on or before January 1, 2032, or

(e) In the event units within the development are sold individually, a unit owner fails to comply with applicable requirements described in paragraphs (b) or (c) of this section, the city manager shall notify the Council; the owner of the property, at the owner's last known address; and any known lender, at the lender's last known address, of the manager's intention to recommend to the Council that the exemption be terminated. The notice shall clearly state the reasons for the proposed termination, and shall require the owner to appear before the Council, at a time specified in the notice, which shall not be less than 20 days from the date the notice was mailed, to show cause, if any exists, why the exemption should not be terminated.

(2) If the owner fails to appear and show cause why the exemption should not be terminated, the city shall further notify every known lender of the owner's failure to appear and shall allow the lender a period of not less than 30 days, beginning with the date that the notice of failure to appear and show cause is

mailed to the lender, to cure any noncompliance or to provide adequate assurance that the noncompliance will be remedied.

(3) If the owner fails to appear before the Council at the time specified in the notice, or if the owner appears and fails to show cause why the exemption should not be terminated, and a lender fails to cure or give adequate assurance that any noncompliance will be cured, the Council shall adopt a resolution terminating the exemption, which shall contain its findings in support thereof. Copies of the resolution shall be filed with the county assessor and mailed to the property owner, at the owner's last known address, and to any lender at the lender's last-known address, within 10 days from the date adopted. If a determination is made that the exemption should continue as previously granted, the Council shall enter written findings of record in support of the continued exemption and forward a copy thereof to the property owner and to any lender within 10 days from the date of the hearing.

(4) All reviews of Council action in denying, approving, or terminating an application shall be governed by the procedures set forth in ORS 34.010 to 34.100, and correction of assessments and tax rolls and the evaluation of the property shall be in conformity with ORS 307.687. The Council's action on an exemption shall not be a land use decision for purposes of administrative review.

(5) If construction, addition, or conversion of multiple-unit housing is not completed by January 1, 2032, upon receipt of a request from the property owner, the Council may, by resolution, extend the deadline for completion of construction of multiple-unit housing for a period not to exceed 12 consecutive months, if it finds the failure to complete construction by the time specified in the resolution was due to circumstances beyond the control of the owner, and that the owner had been and could reasonably be expected to act in good faith and with due diligence.

(6) In any event, no multiple-unit housing granted an exemption by the Council may be exempt from ad valorem taxation for more than 10 successive years. The first year of exemption is the assessment year beginning January 1 immediately following the calendar year in which construction, addition or conversion is completed, determined by that stage in the construction process when, pursuant to ORS 307.330 the improvement would have gone on the tax rolls in the absence of the exemption. The exemption may not include the land, nor any improvements located thereon that are not a part of the multiple-unit housing but may include commercial use of a portion of the structure and parking constructed as part of the multiple-unit housing construction, addition or conversion, and is in addition to any other exemption provided by law. However, no property may be exempt beyond 100 percent of its real market value.

(7) Any exemption granted by the Council shall terminate immediately, without right of notice or appeal, in the event the county assessor determines that a change of use to other than residential or residential with commercial uses of a portion of the structure, or housing has occurred for the multiple-use housing, or portion thereof, or if a low income housing assistance contract with an agency or subdivision of this state or the United States is breached or terminated prematurely, or a declaration as defined in ORS 100.005(12) is presented to the county assessor or tax collector for approval in connection therewith. Termination shall be in accordance with the provisions of ORS 307.627.

(8) Notwithstanding subsections (1) through (7) of this section, if applicant, developer or other owner of the project has failed to comply with the requirements of ORS 307.600 through 307.637, sections 2.945 through 2.947 of this code or the administrative rules adopted thereunder, or a resolution adopted pursuant subsection (7) of section 2.945 of this code, in lieu of subsections (1) through (7) of this section, the city manager may impose penalties as set forth in section 2.1995 of this code. Each day in which a violation is caused or permitted to exist constitutes a separate violation. Failure to pay an administrative

penalty authorized by this subsection shall be grounds for terminating the exemption under subsections (1) through (3) of this section.

Section 2. **Effective date. [OPTIONAL]** The general welfare of the public will be promoted if this ordinance takes effect on **MONTH DAY, 2023**.

Section 3. Because the Multiple-Unit Property Tax Exemptions is a necessary tool for the development of housing for the people of the City of Corvallis. This ordinance shall be effective upon its passage by the Council.

Section 4. No other provision in the Municipal Code is amended by this ordinance. **[RENUMBER THIS SECTION IF YOU DELETE SECTIONS 2 AND 3 ABOVE]**

PASSED by the City Council this _____ day of _____, 2023

APPROVED by the Mayor this _____ day of _____, 2023

EFFECTIVE this _____ day of _____, 2023

Mayor

ATTEST:

City Recorder

ORDINANCE 2023-__

AN ORDINANCE RELATING TO A LOW-INCOME RENTAL HOUSING PROPERTY TAX EXEMPTION ENACTING NEW MUNICIPAL CODE CHAPTER __, “LOW-INCOME RENTAL HOUSING PROPERTY TAX EXEMPTION”

THE CITY OF CORVALLIS ORDAINS AS FOLLOWS:

Section 1. Municipal Code Section [REDACTED] is hereby enacted as fully set out in Exhibit A to this Ordinance, which is attached and incorporated as part of this ordinance.

Chapter XXX (CET is Chapter 8.16)

LOW-INCOME RENTAL HOUSING PROPERTY TAX EXEMPTION (LIRPTE)

Definitions.

- 1) AMI or area median income means the area median income as determined by the State Housing Council based on information from the United States Department of Housing and Urban Development.
- 2) City Manager means the City Manager of the City of Corvallis, or the City Manager’s designee.
- 3) Low-income person or persons means the following:
 - (a) Income at or below 60 percent of the area median income as determined by the Oregon Housing Stability Council based on information from the United States Department of Housing and Urban Development;
 - (b) For the initial year that persons occupy property for which an application for exemption is filed under ORS 307.521, income at or below 60 percent of the area median income as determined by the Oregon Housing Stability Council based on information from the United States Department of Housing and Urban Development. If the owner is a for-profit entity, the income level must remain at or below 60 percent of the area median income. If the owner is nonprofit entity, during the second year of occupancy, the income level of eligible renters may rise (with City staff approval), to at or below 80 percent of the area median income as determined by the Oregon Housing Stability Council based on information from the United States Department of Housing and Urban Development; or
 - (c) For housing units on property that is awarded tax credits through the Federal low-income housing tax credit program and is a qualified low-income housing project meeting the requirements of 26 U.S.C. 42(g)(1)(C), income at or below 80 percent of the area median income as determined by the Oregon Housing Stability Council based on information from the United States Department of Housing and Urban Development, provided the average area median income of all housing units on the property is at or below 60 percent of the area median income as determined by the Oregon Housing Stability Council based on information.
- 4) Qualified rental housing means a property or portion of a property that is offered for rent solely as a residence for low-income persons.

Criteria for Tax Exemption.

1) Properties or portions of properties meeting the following criteria shall be eligible for property tax exemption as provided in [ORS 307.515 through 307.537](#) (for profit owners) and [ORS 307.540 through 307.548](#). Eligible properties must be:

- (a) Located within the limits of the City of Corvallis;
- (b) Multifamily projects containing four or more units;
- (c) Offered for rent, or held for the purpose of developing qualified rental housing; and
- (d) If occupied, occupied solely by low-income persons. Property will be deemed to be occupied by low-income persons if it is made available and reserved exclusively for low-income persons and has been occupied by a low-income person within the last six months. Only that portion of the real property and improvements located thereon that is occupied by low-income persons shall be eligible property.

2) The required rent payments must reflect the full value of the tax exemption;

3) Per statute [ORS 307.517\(e\)](#), projects owned by for-profit entities are restricted to new construction as housing units on the property are required to have been constructed after the provisions for this exemption were adopted by the City. This is not required under [ORS 307.541](#) for projects owned by a nonprofit entity however, Council has determined the exemption will only be available for new construction.

4) The application for tax exemption under this ordinance must have been filed before July 1, 2030.

5) The tax exemption on the property must be approved by the City Council in accordance with the provisions of [ORS 307.515-535](#) for for-profit entities, [ORS 307.540-548](#) for nonprofit entities, and this ordinance.

6) For the purposes of this tax exemption, a person that has only a leasehold interest in property is deemed to be a purchaser of that property if:

- (a) The person is obligated under the terms of the lease to pay the ad valorem taxes on the real and personal property used in this activity on that property; or

7) The rent payable has been established to reflect the savings resulting from the exemption from taxation.

Application for Exemption.

1) Persons seeking tax exemption for eligible property must submit an application to the City Manager on a form provided by the City of Corvallis and pay the fee established by the City Council as set forth in the City of Corvallis fee resolution. The application shall contain the following information:

- (a) The applicant's name, address, and telephone number;
- (b) A legal description of the property for which the exemption is requested;
- (c) If only a portion of the property is eligible, a description of the eligible portion of the property for which the exemption is requested, including the number of affordable housing units;

- (d) A description of the purpose of the project and whether all or a portion of the property is being used for that purpose;
 - (e) A certification of income levels of low-income occupants;
 - (f) A description of how the tax exemption will benefit project residents;
 - (g) A description of the plans for development of the property if the property is being held for future qualified rental housing development;
 - (h) A list of secured lien-holds with addresses of the lienholders; and
 - (i) Such other information as requested by the City of Corvallis.
- 2) The applicant shall verify the information in the application by oath or affirmation.
 - 3) An application which does not contain all the information required by this section and/or is not accompanied by payment of the proper fees shall be returned. Any application returned for these reasons shall be deemed not to have been filed.
 - 4) Applications must be filed on or before December 1 of the calendar year immediately preceding the first assessment year for which exemption is requested and shall be accompanied by the application fee required by the City. However, if the property is acquired after November 1, the application shall be made within 30 days after the acquisition. [[ORS 307.523](#)]

Review of Application.

- 1) The City Manager will process each complete application and make a written recommendation to the City Council in sufficient time to allow the Council to take final action within 30 days of the filing of the application. [[ORS 307.547](#)] Upon receipt of the City Manager's recommendation for approval or denial, the Council will consider the application and determine if the applicant qualifies for the exemption. Within 30 days of the filing of the application, the Council must adopt a resolution approving or denying the application.
- 2) Council will review the staff's findings and recommendations and determine whether or not to grant the exemption. Staff will also coordinate with other taxing districts to gain their support and approval. If there is the support of 51% of the taxing districts and Council approves the exemption, a resolution will be adopted containing the owner's name and address, a description of the housing unit, either the legal description of the property or the county assessor's property account number, any specific conditions upon which the approval of the application is based and if only a portion of the property is approved, a description of the portion that is approved. [[ORS 307.527](#)]
- 3) A resolution approving an application must contain findings on the criteria for approval and must certify to the Benton County tax assessor that all or a portion of the property for which the application was made is exempt from the ad valorem property tax levy of the City of Corvallis.
- 4) If the application is denied, the City shall state in writing the reasons for denial and send the notice of denial to the applicant within 10 days after the denial. The notice shall inform the applicant of the right to appeal under [[ORS 307.533](#)].

5) Following approval, the City shall file with the Benton County assessor and send to the applicant a copy of the resolution approving or denying the application. If the application is approved, the copy shall contain or be accompanied by a notice explaining the grounds for possible termination of the exemption prior to the end of the exemption period or thereafter, and the effects of termination. In addition, the City shall file with the county assessor a document listing the same information otherwise required to be in a resolution as to each application deemed approved.

Property Tax Exemption.

- 1) Except as provided in subsection (B) of this section, the exemptions granted under this chapter apply only to the tax levy of the City.
- 2) The exemption granted under this chapter applies to the tax levy of all taxing districts in which property certified for exemption is located if, upon request, the rates of taxation of such taxing districts whose governing boards agree to the policy of exemption under [ORS 307.515 through 307.523](#), when combined with the rate of taxation of the City, equal 51 percent or more of the total combined rate of taxation on the property granted exemption.
- 3) Property tax exemptions approved under this chapter will be for a period of 20 years. For example, in the event that an exemption is initially approved for an undeveloped parcel and later the exemption was extended to include subsequent construction, the total duration of the exemption may not be increased but will continue to run for a maximum of 20 years from the initial approval. Nothing in this chapter prevents a subsequent, new application for an additional 20-year exemption from being submitted after the first exemption term is completed.
- 4) Applications for property tax exemption under this policy are eligible for property tax exemptions for tax years beginning on or after July 1, 2024.
- 5) The exemption provided for in this chapter is in addition to any other exemption provided by law.
- 6) The approved zoning area for this exemption is limited to the city limits and this exemption is not eligible in Urban Renewal or other Tax Increment Financing (TIF) districts.

Termination.

1) Termination of tax exemption will be accomplished under the conditions and pursuant to the procedures and subject to the remedies contained in [ORS 307.515 through 307.537](#) for a project owned by a for-profit entity and ORS [307.540 through 307.548](#) for a project owned by a nonprofit entity.

Regulatory Power.

1) The City Manager may issue rules necessary for the implementation of this policy.

Section 2. **Effective date. [OPTIONAL]** The general welfare of the public will be promoted if this ordinance takes effect on **MONTH DAY, 2023**.

Section 3. Because the Low Income Rental Property Tax Exemptions is a necessary tool for the development of housing for the people of the City of Corvallis. This ordinance shall be effective upon its passage by the Council.

Section 4. No other provision in the Municipal Code is amended by this ordinance. **RENUNBER THIS SECTION IF YOU DELETE SECTIONS 2 AND 3 ABOVE**

PASSED by the City Council this _____ day of _____, 2023

APPROVED by the Mayor this _____ day of _____, 2023

EFFECTIVE this _____ day of _____, 2023

Mayor

ATTEST:

City Recorder

Property Tax Exemption Programs

CREATING TOOLS TO INCREASE HOUSING OPPORTUNITIES IN CORVALLIS



-
- Low Income Housing Property Tax Exemption (LIHPTE)
 - Multi-Unit Property Tax Exemption (MUPTE)



Pickford Leonard Apartments

Where Corvallis is Today:

Rent Burden

- Corvallis is Oregon's **#1** most severely rent burdened community.
- Approximately **37.1%** of renting households in Corvallis spend more than **50%** of their monthly income towards the costs of renting a home.

Source: Oregon Housing & Community Services

What are Tax Exemptions?

- Legislatively-approved program that relieves qualified individuals or organizations from all of part of their property tax.
- Relief is applied for by organizations and reviewed on a case-by-case basis
- If program criteria is met and review approves the application, property tax exemption is granted for specified amount of time.



Lancaster Bridge Apartments

Why Tax Exemptions?

- Listed as a goal in the Strategic Operational Plan (SOP)
 - P-5(a)- *“The City engages the community in proactively planning for managed growth to achieve compact, resource efficient development that provides for a range of housing options.”*
 - P-8(G)- *“The City leverages community development resources to prioritize housing affordability (...) and fair housing issues (by) evaluating property tax incentives for affordable housing.”*
- Recommended by the Housing Development Task Force.
 - Nonprofit LIHPTE and MUPTE
- Has been requested by developers as a means to increase housing supply.

Why Tax Exemptions?

Basic Idea:

- Offer property tax exemptions for affordable housing and multi-unit dwellings.
- These exemptions would encourage housing developments that otherwise would not be built.
- This is not a new idea. Legislature passed provisions as early as 1975.

Tax Exemption Programs:

- Are a direct subsidy to development and therefore should be evaluated by return on investment & public benefit provided
- If adopted, could have near-term impacts to City and other taxing district revenue, but also long-term tax revenue increases.
- Should be considered carefully in Urban Renewal/Tax Increment Finance (TIF) areas

Current Breakdown of Property Tax Dollar



46.2%
Schools

(including LBCC and Corvallis School District)

32.5%
City of Corvallis

16.2%
Benton Co.

5.1%
Special Districts
(911, Extension, Library, & Soil and Water)

Oregon Cities Already Utilizing These Programs

(LIRPTE) Non-Profit- 307.540	(LIRPTE) For-Profit-307.515	(MUPTE)-307.600
Bend (2022)	Bend (2003)	Bend (2022)
Eugene (2011)	Eugene (1990)	Eugene (2015)
Salem (2018)	Springfield (2018)	Salem (2012)
Albany (2014)	Deschutes County (2016)	Portland (2012)
Portland (2016)	Wilsonville (2012)	Beaverton (2021)
Beaverton (2013)		Cottage Grove (2019)
Forest Grove (2018)		Newport (2018)
Cornelius (2015)		
Tigard (2019)		
Wilsonville (2012)		

Low-Income Housing Property Tax Exemption (LIRPTE) for Nonprofits



- 100% Property Tax Exemption with no time limit as long as criteria is met.
- If approved, the units are limited to renters at 60% AMI or less, local government may choose to allow eligible income to rise to 80% AMI after first year of occupancy.
- Can be existing housing or new development or land held for development-
-staff recommend only for future development
- Annual application, but no limit on length of exemption
- Local government can (and often does) add additional criteria as long as its not inconsistent with the rest of the statute.

Low-Income Housing Property Tax Exemption (LIRPTE) for For-Profits (ORS 307.515)

- Limited to persons at 60% AMI with no increase after the first year of occupancy.
- For-Profits: Only new construction and land being held for development
- No minimum # of units in the statute
- Exemption for 20 years, though it can be renewed
- Local government can (and often does) add additional criteria as long as its not inconsistent with the rest of the statute.

2023 Corvallis Median Income Figures from HUD

Family Size	1	2	3	4	5	6	7	8
100% AMI	\$ 66,600	\$ 76,100	\$ 85,600	\$ 95,100	\$ 102,800	\$ 110,400	\$ 118,000	\$ 125,600
80% (Low Income)	\$ 53,250	\$ 60,850	\$ 68,450	\$ 76,050	\$ 82,150	\$ 88,250	\$ 94,350	\$ 100,400
60% (Low Income)	\$ 39,960	\$ 45,660	\$ 51,360	\$ 57,060	\$ 61,680	\$ 66,240	\$ 70,800	\$ 75,360
50% (Very Low Income)	\$ 33,300	\$ 38,050	\$ 42,800	\$ 47,550	\$ 51,400	\$ 55,200	\$ 59,000	\$ 62,800
30% (Extremely Low Income)	\$ 20,000	\$ 22,850	\$ 25,700	\$ 28,550	\$ 30,850	\$ 33,150	\$ 35,450	\$ 37,700



Low-Income Housing Property Tax Exemption (LIRPTE) Success Stories

- Since its enactment in 1990, 1600 Affordable Housing units have been built in Eugene.
- Currently, Salem has 395 Affordable Housing units enrolled in their program including 180 new units, 11 units in pre-development, and 204 units redesigned to be Affordable Housing units.

Seavey Meadows Apartments



Multiple-Unit Property Tax Exemption (MUPTE) (ORS 307.600)

- New construction, existing, or land held for development are all eligible
- Must be at least two (4) units
- Exemption for up to 10 years, (less can be granted) as long as application is approved.
- Local government can (and often does) add additional criteria as long as its not inconsistent with the rest of the statute.
- Subject to a “low income housing assistance contract”
 - An agreement between a public agency and a property owner that results in the production, rehabilitation, establishment or preservation of housing affordable to those with a defined level of household income.
 - OR Pay-In to support future affordable housing development (E.g. 10% of total exemption)

Multiple-Unit Property Tax Exemption (MUPTE) (ORS 307.600)- public benefits

- Abandoned, vacant or underdeveloped, properties
- Public Infrastructure
- Placemaking or Active Public Spaces
- High Quality Urban Design/ Special Architectural Features
- Sustainable Building and Climate Mindfulness
- Local Labor, Materials, or Ownership
- Economic Opportunities
- Economic Catalytic Effect
- Retrofitting existing buildings
- Connectivity Improvements

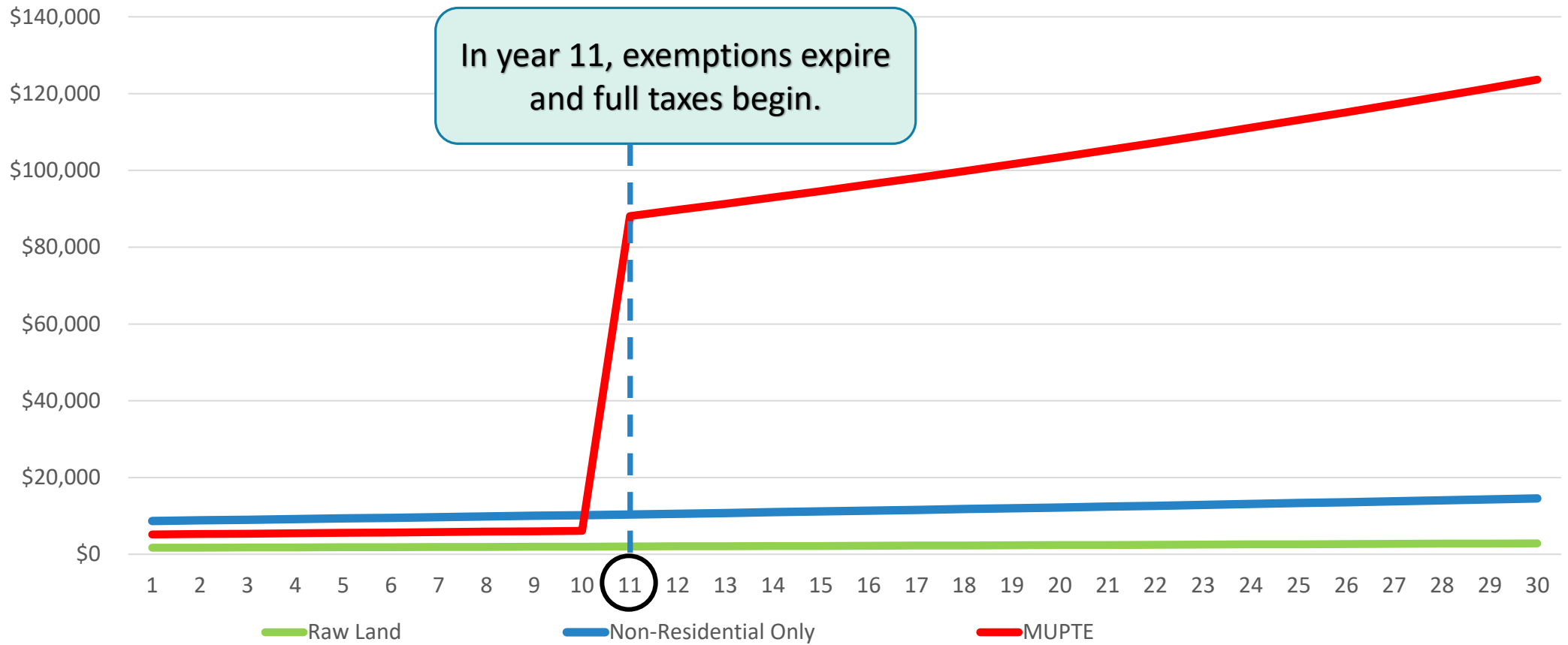
Multiple-Unit Property Tax Exemption (MUPTE) Success Stories

- Eugene's MUPTE was restructured in 2015
 - They have a stringent 7 Core Benefits structure in order to approve a project
 - 381 units have been approved in the program since 2015.
 - Developing the riverfront to rejuvenate existing structures that allow for additional housing types
 - Community benefits and increasing funding towards future affordable housing developments.
 - Bend just recently adopted MUPTE as well.

30 Year Annual Tax Revenue with MUPTE

Example Property Type	Average Assessed Value	Average # of Units	Current Yearly Property Tax	Approx. With MUPTE (adding 80 units) after 10 years
CMU-3 (Ex. Downtown) (Current One Story Comm. Lot)	\$452,984	-	\$8,700	\$88,112
CMU-3 (Ex. Downtown) (Current Empty Lot)	\$89,285	-	\$1,715	\$88,112

30 Year Annual Tax Revenue with MUPTE



Example of Tax Revenue Impacts Across Districts

CMU-3 (Ex. Downtown) (Current Empty Lot)	\$89,285	-	\$1,715	\$88,112
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Description	%	Tax Revenues Before MUPTE	Tax Revenues After MUPTE
Corvallis School District including LBCC	46.2%	\$792.33	\$40,707.74
City of Corvallis	32.5%	\$557.38	\$28,636.40
Benton County	16.2%	\$277.83	\$14,274.14
Special Taxing Districts (911, Extension, Library, Soil & Water)	5.1%	\$87.47	\$4,493.71

Thank you!

IX. LBL ESD LOCAL SERVICE PLAN - SECOND READ (8:30 p.m.)*



Corvallis

SCHOOL DISTRICT

Prepared for: Corvallis School Board
Prepared by: Ryan Noss, Superintendent
Meeting Date: February 9, 2023

Affirm Linn Benton Lincoln Education Service District Local Service Plan 2023-2025 – Second Read ACTION REQUESTED

Background

The Board received information about this request at its January 26, 2023 meeting.

At least 90% of the annual State School Fund (SSF), Property Tax and other qualifying resources allocated to the Linn Benton Lincoln Education Service District (LBL ESD) will be expended on resolution services and are outlined in a Local Service Plan (LSP). Service decisions are made by the member district superintendents for a two-year period. The 2023-2025 LSP, attached, was adopted by the LBL ESD Board of Directors on January 18, 2023. Under Oregon Law, each component school district board must affirm the resolution for the Local Service Plan by March 1 annually.

Involvement

Superintendents of the member districts of the LBL ESD.

Cost Impact

Costs will be factored into the annual budget.

ACTION REQUESTED

Affirm Linn Benton Lincoln Education Service District Local Service Plan 2023-25.

MOTION REQUESTED

“I move to affirm the 2023-2025 Linn Benton Lincoln Education Service District Local Service Plan.”



Linn Benton Lincoln ESD

Local
Service
Plan

2023-2025

905 4th Avenue
Albany, OR 97321
www.lblesd.k12.or.us
541-812-2600

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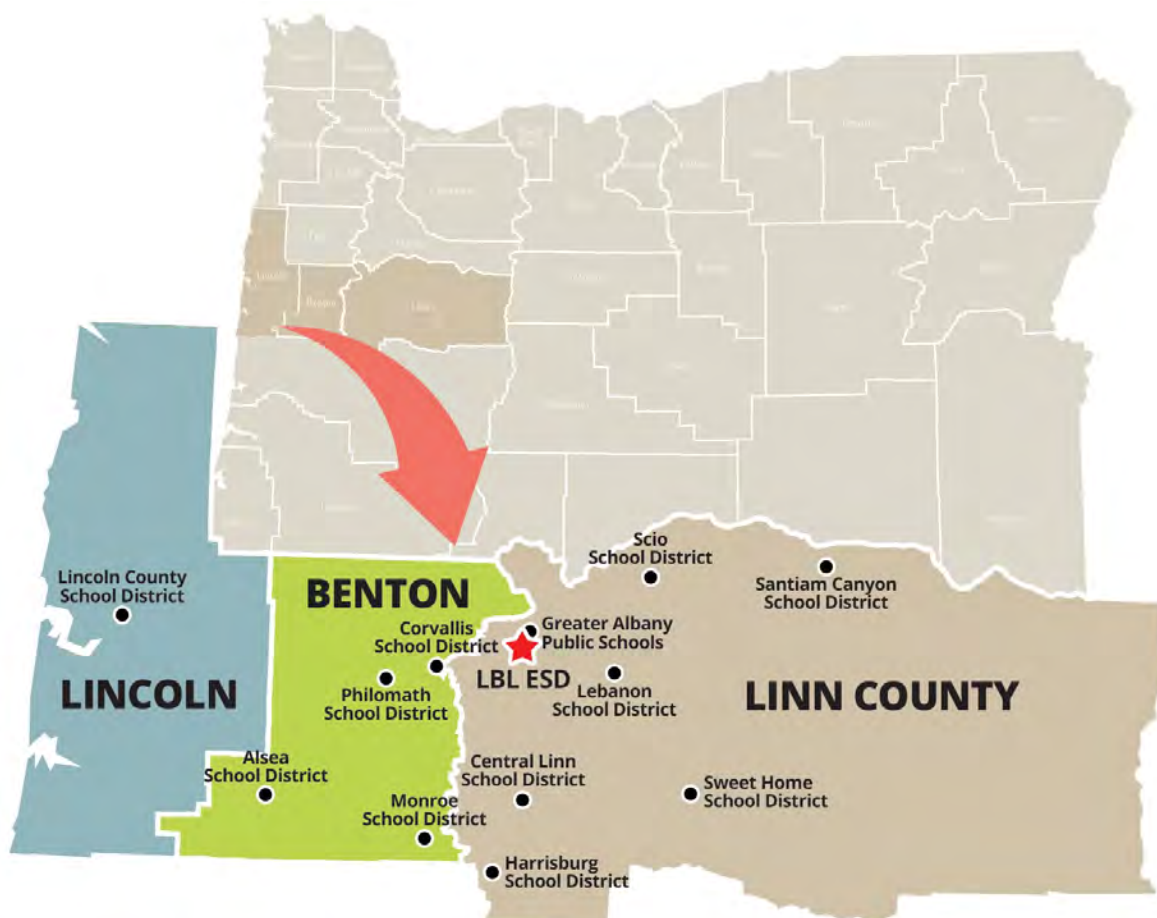
Serving the Counties of Linn, Benton, Lincoln, and Beyond!

Linn Benton Lincoln Education Service District (LBL) serves educational agencies, districts, and schools across the state with high-quality services and programs that are practical, reliable, and economical. LBL has a distinguished reputation for supporting educational excellence and equity, working cooperatively with educators and educational agencies, and effecting productive solutions that help schools, teachers, students, and families meet Oregon's educational goals.

LBL comprises 12 component districts and 96 schools with approximately 37,217 students in Linn, Benton, and Lincoln counties. LBL also serves

students and districts elsewhere in Oregon through grants and contracts. Its governance structure includes a seven-member Board.

LBL is one of 19 Education Service Districts in Oregon that serve all 36 counties. The purpose of Oregon's Education Service Districts is defined in Oregon Revised Statute (ORS) 334.005. Education Service Districts assist school districts and the State of Oregon in achieving Oregon's education goals by providing equitable education opportunities for all of Oregon's public school students.



Education Service Districts (ESDs) originated in Oregon's first laws establishing a general system of common schools. Through the history of Oregon's regional services system, local governances and state statues concerning the mission of ESDs has remained somewhat constant: "Education Service Districts assist school districts and the State of Oregon in achieving Oregon's education goals by providing excellent and equitable educational opportunities for all Oregon public school students."



ORS 334.005 defines the mission, purpose, and accountability of an ESD. The mission of education service districts is to assist school districts and the Department of Education in achieving Oregon's educational goals by providing equitable, high quality, cost-effective, and locally responsive educational services at a regional level.

An education service district plays a key role in:

- Ensuring an equitable and excellent education for all children in the state;
- Implementing the Oregon Educational Act for the 21st Century;
- Fostering the attainment of high standards of performance by all students in Oregon's public schools;
- Facilitating interorganizational coordination and cooperation among education, social service, health care, and employment training agencies.

(Continued on page 6)

Per ORS 334.175, Education Service Districts must provide regionalized core services in the following areas:

- Programs for children with special needs, including but not limited to special education services and services for at-risk students.
- Technology support for component school districts and the individual technology plans for those districts, including but not limited to technology infrastructure services, data services, instructional technology services, and distance learning.
- School improvement services for component school districts, including but not limited to:
 1. Services designed to support component school districts in meeting the requirements of state and federal law;
 2. Services designed to allow the education service district to participate in and facilitate a review of the state and federal standards related to the provision of a quality education by component school districts;
 3. Services designed to support and facilitate continuous school improvement planning;
 4. Services designed to address schoolwide behavior and climate issues;
 5. Services designed to support career and technical education.
- Administrative and support services for component school districts, including but not limited to services designed to consolidate component school district business functions, liaison services between the Department of Education and component school districts, and registration of children being taught by private teachers, parents, or legal guardians pursuant to ORS 339.035.

An education service district may provide entrepreneurial services to public and private entities and to school districts that are not component school districts of the education service district with the approval of the constituent districts through their approval of the Local Service Plan.



We believe that every student, staff and community partner should be treated equitably. Our focus is to eliminate disparities among all groups.

Equity:

Just and fair inclusion. An equitable society is one in which all can participate and prosper to allow all to reach their full potential.

Purpose:

Provide a common vocabulary and protocol to produce and evaluate policies, practices, processes, programs, services or decisions that result in more equitable outcomes.

Procedure:

Consider the following four questions for any policy, practice, process, program, service or decision:

- 1 Who Does It Impact?**
 - Who are the groups affected?
 - What are the potential impacts on these groups?
- 2 Who Has the Opportunities and is Included and Who is Not?**
 - Are existing disparities ignored or worsened?
 - Are there unintended consequences?
- 3 Whose Voices Are at the Table?**
 - Have we intentionally involved our partners?
- 4 What Can We Do About It?**
 - How will we mitigate the negative impacts and address the barriers identified above?

Non-Discrimination: LBL ESD prohibits discrimination and harassment on any basis protected by law, including but not limited to an individual's perceived or actual race, color, religion, sex, sexual orientation, national or ethnic origin, marital status, disability, veterans status, or the protected status of any other person with whom the individual associates. [Policy AC](#).





Mission

Linn Benton Lincoln Education Service District serves districts, schools, and students by providing equitable, flexible, and effective educational services through economy of scale.



Vision

To be a responsive and transparent organization that supports districts by embracing continuous improvement in helping every child succeed.



Values

Success for all students and their districts.

Relationships built on trust, responsiveness, and honesty.

The four “E”s of Excellence, Equity, Efficiency, and Effectiveness.

Accountability.

Goals and Board Objectives

Goal 1

Support success for all students and their districts by delivering excellent, equitable, efficient, and cost effective services.

Board Objective 1

Pursue innovation through service delivery, evaluation and improvement, staff development, and the use of technology.

Goal 2

Foster positive relationships by strengthening communication within the ESD, with school districts, other organizations, and communities.

Board Objective 2

Continue to enhance positive relationships and effective communication with LBL ESD employees, school districts, and communities.

Goal 3

Continue long-term financial stability.

Board Objective 3

Maintain a long-term financial plan with guidelines and philosophy that includes contingencies for economic changes.

Board of Directors



Jean Wooten
Zone 1
Term Expires: 6/30/2025



Roger Irvin
Zone 2
Term Expires: 6/30/2025



Frank Bricker
Zone 3
Term Expires: 6/30/2025



Penny York
Zone 4
Term Expires: 6/30/2023



Amy Vetor
Zone 5
Term Expires: 6/30/2023

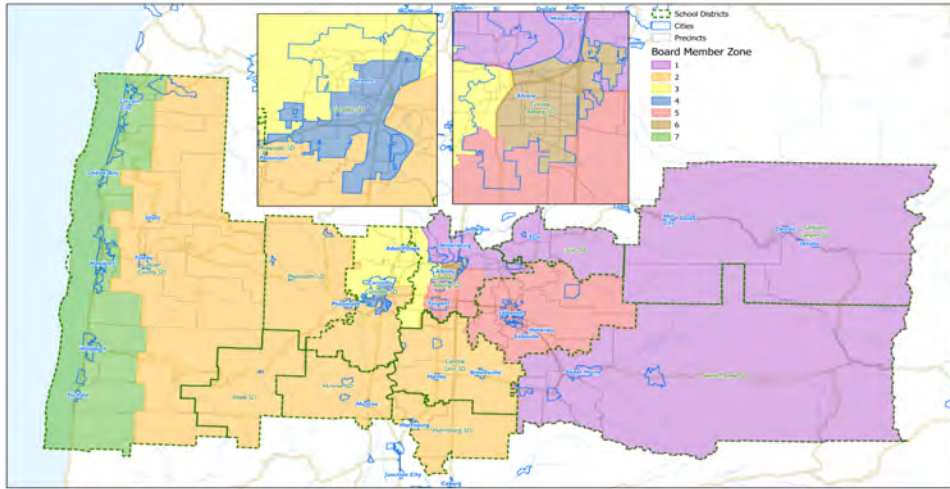


Miriam Cummins
Zone 6
Term Expires: 6/30/2023



David Dunsdon
Zone 7
Term Expires: 6/30/2023

Board Zones



Board Zones

- 1
- 2
- 3
- 4
- 5
- 6
- 7

Zone 1
Greater Albany (part),
Sweet Home, Scio,
Santiam Canyon

Zone 3
Corvallis (North),
Greater Albany (part)

Zone 6
Greater Albany (part)

Zone 2
Central Linn, Harrisburg,
Monroe, Alsea, Philomath,
Lincoln Co. Schools (part)

Zone 4
Corvallis (part)

Zone 7
Lincoln County (part)

Zone 5
Lebanon,
Greater Albany (part)

Budget Committee

Richard Moore
Zone 1
Term Expires: 6/30/23

Sarah Finger McDonald
Zone 4
Term Expires: 6/30/2024

Ron Beck
Zone 7
Term Expires: 6/30/2023

Sarah Fay
Zone 2
Term Expires: 6/30/2025

Nichole Piland
Zone 5
Term Expires: 6/30/2024

Risteen Follett
At Large
Term Expires: 6/30/2025

Sami Al-Abdrabbuh
Zone 3
Term Expires: 6/30/2025

Michael Thomson
Zone 6
Term Expires: 6/30/2024

Cabinet Members



Tonja Everest
Superintendent



Jason Hay
Assistant Superintendent



Rocco Luiere
Exucutive Financial
Officer



Kate Marrone
Executive Human Resources
Officer



Tim Jones
Executive Information and Technology
Officer



Teresa Oversby
Business Services



Angie Greenwood
Cascade Regional
Inclusive Services



Debbie McPheeters
Early Intervention / Early
Childhood Special Ed.



Autumn Belloni
Early Intervention / Early
Childhood Special Ed.



Kimberly McCutcheon-Gross
Early Intervention / Early
Childhood Special Ed.



Cathy Wright
Long Term Care and
Treatment Education



Laura Petschauer
Special Education and
Evaluation Services



Nancy Griffith
Strategic Partnerships
for Students Success



Kristina Wonderly
Strategic Partnerships
for Student Success



Jennifer Kessel
Technology and
Information Services



Kristy Stringham
Special Education
Program Coordinator



Alsea 7J
P.O. Box B
301 South 3rd Street
Alsea, OR 97324

Interim Superintendent:
Sean Gallagher
<http://alsea.k12.or.us/>
Phone: 541-487-4305



Central Linn 552C
P.O. Box 200
32433 Highway 228
Halsey, OR 97348

Superintendent: Candace Pelt
<http://centrallinn.k12.or.us/>
Phone: 541-369-2813



Corvallis 509J
1555 SW 35th Street
Corvallis, OR 97333

Superintendent: Ryan Noss
<https://www.csd509j.net/>
Phone: 541-757-5841



Greater Albany 8J
718 Seventh Avenue SW
Albany, OR 97321

Superintendent: Andy Gardner
<https://albany.k12.or.us/>
Phone: 541-967-4511



Harrisburg #7
P.O. Box 208
865 LaSalle Street
Harrisburg, OR 97446

Superintendent: Bryan Starr
<https://www.harrisburg.k12.or.us/>
Phone: 541-995-6626 ext. 1



Lebanon Community #9
485 S Fifth Street
Lebanon, OR 97355

Superintendent: Jennifer Meckley
<http://lebanon.k12.or.us/>
Phone: 541-451-8511



Lincoln County 1212
NE Fogarty Street
Newport, OR 97365

Superintendent: Dr. Karen Gray
<https://lincoln.k12.or.us/>
Phone: 541-265-9211



Monroe 1J
365 N 5th Street Monroe,
OR 97456

Superintendent: Bill Crowson
<https://monroe.k12.or.us/>
Phone: 541-847-6292



Philomath 17J
1620 Applegate Street
Philomath, OR 97370

Superintendent: Susan Halliday
<https://www.philomathsd.net/>
Phone: 541-929-3169



Santiam Canyon 129J
P.O. Box 197
150 SW Evergreen Street
Mill City, OR 97360

Superintendent: Todd Miller
<http://santiam.k12.or.us/>
Phone: 503-897-2321



Scio 95
38875 NW First Avenue
Scio, OR 97374

Superintendent: Steve Martinelli
<https://scio.k12.or.us/>
Phone: 503-394-3261



Sweet Home 55
1920 Long Street Sweet
Home, OR 97386

Superintendent: Terry Martin
<http://sweethome.k12.or.us/>
Phone: 541-367-7637



September/October

Visit and interview districts to discuss service level satisfaction, LBL performance measures, and emerging needs. Survey electronically as needed.



October/November

Present VCSA draft resolution Local Service Plan for the next biennium. Review/revise the Local Service Plan as described under ORS 334.175(1) with input from Superintendents.



November

VCSA Superintendents finalize the Local Service Plan services and agreements resulting in recommendation of the LBL Local Service Plan to the LBL Board of Directors and component school districts.



January

The recommended LBL Local Service Plan will be provided to the LBL Board of Directors for adoption for the biennium. By statute, the Local Service Plan must be approved by districts each year.



February

After being adopted by the LBL Board of Directors, the Local Service Plan is approved on or before March 1 by resolution of two-thirds of the component school districts representing more than 50% of the students in the LBL region. Adoption by component district boards shall occur before March 1.



March

Notify LBL staff of changes in service requirements as established in the Local Service Plan.



April/May

LBL acquires the necessary staffing, equipment, and technology and other resources to deliver the services required or services are brokered through other sources.

Resolution Service Allocation

At least 90% of the annual State School Fund (SSF), property tax, and other qualifying resources allocated to LBL will be expended on resolution services. Services will be provided on a two-tiered basis.

Tier 1 Resolution Services

Tier 1 includes services that are available to all 12 districts and are determined as being essential to all districts. Approval to sustain or add a Tier 1 service occurs with a positive vote of two-thirds of the districts, representing over 50% of the students, based on the final ADMr from the 2020-2021 fiscal year as provided by the Oregon Department of Education in May of 2022. The emphasis in Tier 1 is on achieving the greatest economies of scale and assuring equity of access. Tier 1 services are fully funded from the 90% SSF allocation. Service decisions are made for a two year period. However, if a service is provided through a contract that LBL holds with a third party vendor, the term of that contract will take precedence. Current Tier 1 services include:

- Network Support Services including Wide Area Network Operation
- Cyber Safety
- Special Education and Evaluation Services (School Psychologists, Speech Language Pathologists, and other special education assessment personnel)
- Early Childhood Special Education Evaluation
- Audiology Evaluation
- Occupational Therapy
- Physical Therapy
- Augmentative Communication Services
- Severe Disabilities: Support and consultation for students
- Strategic Partnerships for Student Success
- Home School: Registration and assessment tracking
- Business Information Services
- InTouch Student Receipting Software
- Frontline Software - Forecast 5, 5Cast, 5Cast Plus, and 5Sight
- Courier
- Student Information System Suite: Synergy with Analytical and multi-tiered systems of support modules.

Tier 2 Resolution Services

Once Tier 1 funds are allocated, the remaining balance is used for Tier 2 services. Tier 2 funds are allocated based on the average of the last 3 years of actual ADMw. For the 2023-2024 fiscal year, ADMw from FY19/20, FY20/21 and FY21/22 will be used. For the 2024-2025 fiscal year, ADMw from FY20/21, FY21/22 and FY22/23 will be used. The amount is rounded to the nearest tenth of a percentage, not less than 1%. This allows LBL and its component school districts will stay within the constraints of the agreements, yet provide flexibility in the use of funds.

It is further agreed:

Changes in Tier 2 resolution services are negotiated by each district between the LBL Superintendent and the component school district Superintendent based on individual needs and within the following criteria:

- Assist component school districts in meeting requirements of state and federal law
- Improve student learning
- Enhance the quality of instruction provided to students
- Provide professional development to component school district employees
- Enable component school districts and the students who attend schools in those districts to have equitable access to resources
- Maximize operational and fiscal efficiencies for component school districts

- Service decisions will be made prior to May 1st of each year when possible
- Estimates of available resolution funding will be provided in April of each year

While every attempt is made to achieve economies of scale in Tier 2, the emphasis is on customizing a service package for each district. Tier 2 services do not require participation by a certain number of school districts. The emphasis is on the development of consortia of districts utilizing a given service. These consortia may, and most likely will, utilize a variety of funding resources, including resolution service resources, to fund services. The cost of Tier 2 services will be based on the districts ADMr where applicable. Up to 50% of the district's allocated Tier 2 resources may be used to acquire services from sources other than LBL if the service is not provided by LBL, based on the above criterion. Individual districts will determine Tier 2 services of Charter Schools.

Amendments to the Local Service Plan

If the component school districts approve an amendment to a Local Service Plan, the board of the education service district may amend a Local Service Plan that has been previously adopted by the LBL Board and approved by the Boards of component school districts.

ADMw that is used to calculate resource distribution for the 2023-2025 Local Service Plan are as follows:

(Continued on page 18)

Enrollment for Year 1 of the 2023-2025 Biennium

Tier 2 funds are allocated based on the average of the last 3 years of actual ADMw. ADMw from the previous three years will be used. This information is provided below.

3 Year Actual ADMw and Allocation of Tier 2 Funds for FY23/24

District	2019-2020 ADMw	2020-2021 ADMw	2021-2022 ADMw	3 Year Average	% of Total ADMw	% Allocation of Tier 2 Funds
Alsea	465.9	961.4	1,116.4	847.9	1.9%	1.9%
Central Linn	844.4	823.2	729.9	799.2	1.8%	1.8%
Corvallis	7,847.5	7,769.4	7,465.8	7,694.2	17.0%	17.0%
Greater Albany	11,050.5	11,050.5	10,698.4	10,933.1	24.2%	24.2%
Harrisburg	1,029.5	1,009.8	941.5	993.6	2.2%	2.2%
Lebanon	4,928.5	4,908.0	4,689.1	4,841.9	10.7%	10.7%
Lincoln County	7,037.5	7,032.5	6,618.0	6,896.0	15.3%	15.3%
Monroe	531.4	507.1	513.4	517.3	1.1%	1.1%
Philomath	1,939.8	1,935.8	1,832.0	1,902.5	4.2%	4.2%
Santiam Canyon	5,458.0	5,626.7	3,820.6	4,968.4	11.0%	11.0%
Scio	1,073.0	3,053.0	2,254.9	2,127.0	4.7%	4.7%
Sweet Home	2,734.3	2,711.2	2,572.9	2,672.8	5.9%	5.9%
	44,940.3	47,388.6	43,252.9	45,193.9	100%	100%

The amount is rounded to the nearest tenth of a percentage, not less than 1%. This allows LBL and its component school districts to stay within the constraints of the agreement, yet provide flexibility in the use of funds.





SPECIAL EDUCATION SERVICES

Audiology Screening and Augmentative Communication

Service: Audiology Screening and Augmentative Communication

Program: Cascade Regional Inclusive Services

How it's funded: Tier 1

Contact: Angie Greenwood

Hearing screenings are provided to all students in kindergarten, 1st and 3rd grades who attend public schools. A child who fails two hearing screenings is then referred to the audiologist for an audiology evaluation. Testing may include: otoscopy, acoustic emittance testing, standard air and bone conduction

audiometry, speech audiometry, and otoacoustic emissions.



Augmentative Communication



Service: Augmentative Alternative Communication (AAC)

Program: Cascade Regional Inclusive Services

How it's funded: Tier 1

Contact: Angie Greenwood

Students who have an existing special education program, demonstrate significant difficulty communicating, and need a specialized system to support their education program are referred to Augmentative Alternative Communication Specialists. The goal of the specialists is to support school staff in creating and supporting student communication opportunities throughout the school day/week- infusing communication training in daily tasks and routines.

Early Childhood Special Education Evaluation

Service: Early Childhood Special Education Evaluation

Program: Early Intervention/Early Childhood Special Education

How It's Funded: Tier 1 and State Grant

Contact: Autumn Belloni, Debbie McPheeters and Kimberly McCutcheon-Gross

LBL early intervention specialists provide evaluations for students from birth to age 5 who are suspected of having a developmental delay or disability, including challenges in how they see, hear, talk, move, respond to others, play or learn. Families, child care providers, preschools, physicians, and community agencies can all refer students to the program for evaluation. Children who are found to have a developmental delay or disability are provided an Individualized

Family Service Plan (IFSP). An IFSP is a plan of services individualized for each child and family and includes the child's abilities and needs, services for the child and family, family outcomes related to the child's needs and goals, and objectives reflecting both the child's developmental and special education needs.



Occupational Therapy

Mild/Moderate occupational therapy in the educational setting supports school staff toward the collaborative implementation of student and children's educational goals. Providers assist in the implementation of Individual Family Service Plan (IFSP) and Individual Education Program (IEP) goals with a focus on adaptations and functional skills that promote progress toward those goals. Providers give direct consultation

Service: Occupational Therapy

Program: Cascade Regional Inclusive Services

How It's Funded: Tier 1 and Tier 2 and State Grant

Contact: Angie Greenwood

to school staff and early intervention families for children eligible for services. Classroom teachers and interventionists are assisted with program development and interpretation of medical information. In-service training opportunities are available to enhance knowledge and understanding of issues impacting children's progress towards IFSP or IEP goals.



Physical Therapy

Service: Physical Therapy
Program: Cascade Regional Inclusive Services
How It's Funded: Tier 1 and Tier 2 and State Grant
Contact: Angie Greenwood

Physical therapists play an important role in both developing standards for school staff to assist students with gross motor deficits and in developing health care protocols to ensure safety, availability, accessibility, and self-



care in the school environment. A library of equipment is available for loan including assistive technology, positioning equipment, recreational equipment, and mobility aids. Providers give direct consultation to school staff and early intervention families for children eligible for services. Classroom teachers and interventionists are assisted with program development and interpretation of medical information. In-service training opportunities are available to enhance knowledge and understanding of issues impacting children's progress toward Individual Family Service Plan (IFSP) or Individual Education Program (IEP) goals.

School Psychological Services



Service: School Psychological Services
Program: Special Education and Evaluation Services
How It's Funded: Tier 1 and Tier 2
Contact: Laura Petschauer

School psychologists provide evaluation and consultation services to component districts. The school psychologists complete some evaluations in their assigned districts and also lead more complex team evaluations (such as Autism Spectrum Disorder and Culturally and Linguistically Diverse evaluations) that take place in the ESD's testing center. Additionally, school psychologists provide consultation services in a wide range of areas such as systems development, academic interventions and behavioral supports for both general education and special education students, evaluation planning, as well as legal compliance.

Severe Disability Services

Service: Severe Disability Services
Program: Special Education and Evaluation Services
How It's Funded: Tier 1 and State Grant
Contact: Laura Petschauer

Consultants provide support on instructional programming for students with moderate to severe intellectual disabilities, financial support, and access to an extensive lending library with materials that target the educational needs of students with moderate to severe intellectual disabilities. Services are provided by a program consultant which include the following resources: coordinates library purchases and

distributes list of available materials, provides districts with or helps districts find technical assistance and materials identified in district goals, visits each district monthly to observe programs and to provide consultation, serves as regional qualified trainer for Extended Assessment, and maintains an iPad loaded with educational apps for teacher preview.



Spanish Interpreter and Translation Services

Interpretation (oral) and translation (written) services in Spanish for school-related activities and meetings/services related to special education are offered through the Special Education and Evaluation Services program. The interpreter/translator services include interpreting at special education meetings and providing exact

translation of all school-related materials and forms, including but not limited to: evaluation reports, education forms, and parent communications. Staff can attend special education meetings to provide interpretation. This service also supports the Culturally and Linguistically Diverse (CLD) evaluations conducted per district request.

Service: Spanish Interpreter and Translation Services
Program: Special Education and Evaluation Services
How It's Funded: Tier 1 and Tier 2
Contact: Laura Petschauer



Special Education Collaborative

Service: Special Education Collaborative
Program: Special Education and Evaluation Services
How It's Funded: Tier 2
Contact: Laura Petschauer

The Special Education Collaborative consists of five component districts who coordinate service and professional development needs through the ESD's learning consultants and school psychologists to maximize the support of district teachers and administrators. The collaborative services and supports include, but are not limited to the following: consultation on special education paperwork development, Individualized Education Plan (IEP) preparation, action plan

and system development, short professional development for individuals or groups of teachers, Oregon Department of Education (ODE) guidance and sharing of ODE resources, Systems Performance Review & Improvement (SPR&I) procedures, and review and maintaining the Electronic Special Education Manual (ESEM).



Special Education Evaluation Services

The Special Education and Evaluation Services (SEES) program offers support to students across the broad range of services, including: system development for general education interventions in academics and behavior, evaluations for Special Education identification, psychologists, speech language pathologists and educational consultants services, interpreter and translator services in Spanish,

Service: Special Education Evaluation Services
Program: Special Education and Evaluation Services
How It's Funded: Tier 1
Contact: Laura Petschauer

Multi-Tiered Systems of Support (MTSS) consultation and training, professional development on research based initiatives, and special education law and current practices in evaluation by SEES staff.



Speech and Language Services

Service: Speech Language Services

Program: Special Education and Evaluation Services

How It's Funded: Tier 1 and Tier 2

Contact: Laura Petschauer

Speech Language Pathologists (SLPs) provide speech and language services in Tier 1 evaluations as well as a direct service for districts to address students with a speech language impairment that adversely impacts their educational performance. As a Tier 1 service, speech language pathologists work with the evaluation teams to help identify and evaluate students with a suspected speech language impairment, suspected Autism Spectrum Disorder, or to help teams identify a language difference due to an English language proficiency rather than a disorder for students who are bilingual. As a Tier 2 service, districts are able to purchase FTE to support direct services within districts. Services include improving communication skills for students coping with difficulties in learning to listen, speak, read and/or write. SLPs serving in the schools case manage students who are identified with an eligibility of a speech language impairment as well as serve on intervention teams to help determine appropriate next steps for students who may be struggling with speech and/or language. SLPs may work with students under all disability categories and provide services under Specially Designed Instruction (SDI), related service, and/or consultation. These services may include articulation, receptive language, expressive language, social language, fluency, and voice.





TECHNOLOGY SUPPORT SERVICES

Business Information System (BIS)

Service: Business Information System (BIS)
Program: Business Services
How It's Funded: Tier 1 and Tier 2
Contact: Rocco Luiere

Infinite Visions is a fully integrated solution for financial and personnel management. It consists of integrated financial, human resources, payroll, purchasing, warehouse and fixed asset applications. Designed specifically for schools, Infinite Visions is a true K-12 multi-fund, modified accrual accounting system, both Generally Accepted Accounting Principles (GAAP) and Government Account Standards Board (GASB) compliant, offering full

Microsoft Office integration, drill-down capabilities, expert state reporting, customizable data sorting, and comprehensive reporting. The Infinite Visions suite also includes integrated applications such as the iVisions Web Portal that brings the power of Infinite Visions to every employee's desktop for employee self-services and school site functionality. LBL provides level 1 customer support to districts and acts as a liaison between Tyler Technologies and districts. Customer support includes problem-solving, training, facilitation of user groups, and upgrades and maintenance to each district database.



Cyber Safety

In the last year over 1000 schools have been negatively impacted by ransomware and many more have had breaches that resulted in stolen data. These attacks can cost districts in excess of one million dollars to rectify. Due to this uptick in cyber related attacks many cyber insurance carriers have increased their requirements for coverage.

Service: Cyber Safety
Program: Technology and Information Services
How It's Funded: Tier 1
Contact: Tim Jones

Cyber safety services are designed to help districts assess compliance with insurance requirements and improve their security posture. Cyber safety engineers can work with districts to create a complete security profile and make recommendations on how best to protect the district from malicious actors. While no amount of preparation can prevent all cyber attacks, the cyber safety services can help to lessen the impact in the case of the cyber attack.



Data Integrations

Service: Data Integrations
Program: Technology and Information Services
How It's Funded: Tier 2
Contact: Tim Jones



Data integration services offer the ability to integrate LBLED hosted applications with a variety of third party vendors, including but not limited to Destiny, MealTime, Canvas, Google and School Messenger. Integrations can be configured, implemented and monitored for proper transmission of data.

Desktop Support



Service: Desktop Support
Program: Technology and Information Services
How It's Funded: Tier 1
Contact: Tim Jones

Computer support technicians (desktop support) offer support to users who are experiencing problems with their individual desktop computers or software. Assistance is provided to computer users by answering questions and resolving technical problems related to computer equipment and software. They may install or update required hardware and software, and recommend computer products or equipment to improve district productivity.

Frontline (formerly Forecast5)

Service: Frontline License
Program: Business Services
How It's Funded: Tier 1
Contact: Rocco Luiere



Tier 1 funds support the purchase of Frontline licenses for three products: 5Cast, 5Cast *Plus* and 5Sight. A statewide contract with Frontline provides technical support, regional training, and report development.

Internet Access

Internet access (ISP) service is available to provide districts with reliable high speed internet secured by a high availability firewall pair



and optional content filtering. Network devices and facilities required to deliver ISP service are housed and maintained in the LBL data center facility. This secure facility provides an environment that includes high-capacity cooling and emergency power capabilities.

Service: Internet Access
Program: Technology and Information Services
How It's Funded: Tier 1 and Tier 2
Contact: Tim Jones

InTouch Receipting Software

Service: InTouch Receipting Software
Program: Business Services
How It's Funded: Tier 2
Contact: Rocco Luiere



InTouch is a comprehensive cash receipting software developed for K-12 schools that provides information in real-time. Tier 1 funds support the purchase of licenses for InTouch software and LBL staff provide level 1 support and training to districts. The software is a point of sale, system that manages students fees, tracks donations and payments for fundraisers, and provides comprehensive reporting.

Low Voltage

Low-voltage electrical work requires a licensed (journeyman) staff who can provide design, installation, maintenance, replacement and repair of electrical systems under 100 volts. Services include any kind of device that connects through the internet, such as telephone systems, climate controls, and even clocks. This service and other related

Service: Low Voltage
Program: Technology and Information Services
How It's Funded: Tier 2 FTE
Contact: Tim Jones



network consulting services are offered economically and with a clear understanding of district needs and the best time to complete work within a school calendar. As school districts replace older technology equipment, they need to update their existing CAT-3/4/5 cabling with newer CAT-5+ or CAT-6.

Network Management

Service: Network Management

Program: Technology and Information Services

How It's Funded: Tier 1 and Tier 2

Contact: Tim Jones

Network technicians provide support for your district's local and wide area networks which includes troubleshooting, patching, configurations and monitoring. Technicians maintain and provide consultation on network



equipment such as switches, routers, firewalls, and access points. Technology moves at a fast pace and our technical staff can help districts keep up with changing technologies.

Synergy (formerly Student Information System (SIS) Suite

LBL provides a comprehensive student information system (SIS) to districts and schools across Oregon. The Synergy SIS includes an administrative student information system, teacher gradebook and attendance, master/student scheduler, online registration system, MTSS, Special education and analysis tools. These applications offer secure, configurable access to student demographics, enrollment,

Service: Synergy

Program: Technology and Information Services

How It's Funded: Tier 1

Contact: Tim Jones

grades, schedules, and much more. The system assists district offices with data assistance and submission of state reports.



Power School Special Education Records Management

Service: Special Education Records Management

Program: Technology and Information Services

How It's Funded: Tier 2

Contact: Tim Jones

LBL provides a web-based special education management system. This special education management system enables educators to document all activities from pre-referral, referral, eligibility, Individual Education Program (IEP) development, IEP progress reporting to parents, and IEP revisions.

The model also includes private school



Individualized Service Plan (ISP) forms, data tracking sheets, and other forms. PowerSchool has an extensive suite of reports for district administrative reporting and state reporting. PowerSchool can be integrated with a district's student information system allowing specified data to flow between the two systems.

Systems Engineering



Service: Systems Engineering

Program: Technology and Information Services

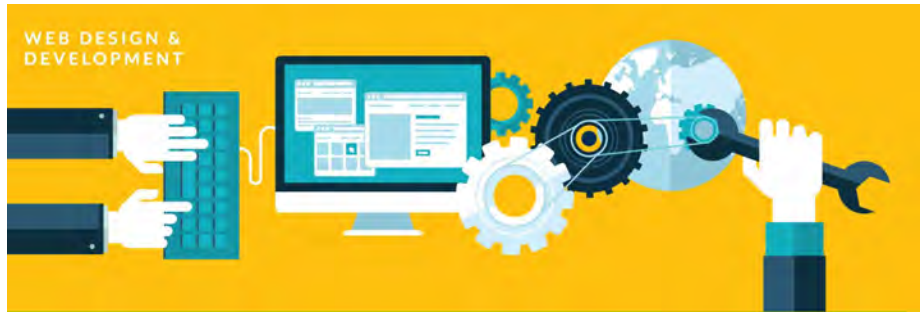
How It's Funded: Tier 2

Contact: Tim Jones


System engineers specialize in solving complex engineering problems regarding maintenance of and implementation of new systems. Engineers work to implement best practices in application delivery and data storage. These services include application and website hosting, data backups and datacenter designs and implementations. Engineering procedures are developed from idea to implementation to ensure security, service and sustainability.

Web Design and Maintenance

Service: Web Design and Maintenance
Program: Technology and Information Services
How It's Funded: Tier 2
Contact: Tim Jones



LBL offers website development, hosting, and management solutions for district web-related needs. All of our websites utilize responsive design, with content that tailors to any device. Websites and content are made accessible to the widest audience. LBL’s social media integration allows districts to make multiple posts of the same content for website and social media feeds, such as Facebook and Twitter saving you time. LBL has developed a mobile app for websites that allows users to quickly access website information, news, and resources, as well as receive push notifications for instant communication from school district officials. The mobile app is available for Android and Apple devices.

A background image of school supplies including a pencil holder with pencils, a stack of books, and an apple with a leaf, all rendered in a monochromatic red color.

SCHOOL IMPROVEMENT SERVICES

Attendance Services

Service: Attendance Services
Program: Strategic Partnerships for Student Success
How It's Funded: Tier 2 and State Grant
Contact: Nancy Griffith



School attendance advisors work in collaboration with educators to mobilize schools and communities to teach the value of regular school attendance. Decreasing absenteeism involves a team approach in addressing the complex needs of our most vulnerable children in schools. School attendance advisors provide positive messaging, home visits, and mentoring to students and families. They address barriers to regular school attendance and connect students and families to community resources when needed. Schools attendance advisors work closely with school teams to promote a positive culture of attendance and an engaging school environment that motivates daily attendance.

Behavior Consultant Services

Behavior consultants work closely with teachers and administrators to provide behavioral intervention for students in the classroom. Behavior consultants collaborate with educators to complete Functional Behavior Assessments (FBAs) and positive Behavior Intervention Plans (BIPs). They provide specific student strategies to help students learn new behavior skills and promote prosocial behavior and emotional regulation. Behavior consultants provide support for level 1 and level 2 student behavioral safety assessments and sexual incident response

Service: Behavior Consultant Services
Program: Strategic Partnerships for Student Success
How It's Funded: Tier 2
Contact: Kristina Wonderly



advisory teams. They also provide nonviolent crisis intervention training to teach educators best practices for managing difficult situations involving unsafe behavior.

Family Support Liaisons

Family support liaisons offer a range of services that include, but are not limited to addressing, physical and mental health services, case coordination services, positive youth development opportunities, and education supports. Of importance, secure connections are made for families to access health and social services, assist in navigating social service systems, and eliminating barriers. A disproportionate number of youth and families encounter adversaries such as poverty, homelessness, bullying/harassment, trauma, crisis, food insecurity, and substance abuse resulting in problems with social, emotional, and behavioral health issues. The vision is to fully engage and support underserved populations by integrating and leveraging resources that eliminate barriers to school success and foster successful transition to the workforce or postsecondary education.

Service: Family Support Liaisons

Program: Strategic Partnerships for Student Success

How It's Funded: Tier 2

Contact: Kristina Wonderly



Home School Support

Service: Home School Support

Program: Strategic Partnerships for Student Success

How It's Funded: Tier 1

Contact: Nancy Griffith

LBL home school registrar monitors and maintains records of compliance for home school students and their parents residing in Linn, Benton, and Lincoln counties. LBL serves as a home school information resource for parents, students, schools, and districts.

When a student is being home schooled, parents must notify LBL of their intention to home school. Home school is education provided in the home by the parent or guardian. Home school parents have the full responsibility for their student's education, including all curriculum choices, record keeping, and testing compliance.



Library/Media Services

This service provides districts with the opportunity to purchase district-based library media services at the level of FTE required to meet Division 22 Standards. The specialist primarily provides consultation services that may include supporting districts in the development of library media program goals, library inventory training, and database management along with providing recommendations for media, book and collection purchases as well as other services as needed by the district.

Service: Library/Media Services
Program: Strategic Partnerships for Student Success
How It's Funded: Tier 2
Contact: Nancy Griffith



Student and Family Support Services

Service: Student and Family Support Services
Program: Strategic Partnerships for Student Success
How It's Funded: Tier 1
Contact: Nancy Griffith

This service provides oversight and coordination of student and family support services including behavior consultants, school attendance advisors, family support liaisons, home school, youth transition specialists, and transition network facilitators. Additional services include crisis response, grant writing, and service coordination with youth serving agencies specifically addressing health and social services.





ADMINISTRATIVE SERVICES

Business Administration Services

Service: Business Information System
Program: Business Services
How It's Funded: Tier 2
Contact: Rocco Luiere

The business office serves component and non-component districts by offering services to support the many business functions of a district. Services included payroll,

accounts payable, grants, and general transactional and state reporting support.



Courier Service

LBL provides courier service for component districts for delivery of materials and correspondence throughout the region. This service is provided for each component district twice weekly during the school year and one weekly during summer breaks.

Service: Courier
Program: Facilities Services
How It's Funded: Tier 1
Contact: Jason Hay



E-rate Services

Service: E-rate Services
Program: Business Services
How It's Funded: Tier 2
Contact: Rocco Luiere

The Universal Service Administration Company's (USAC) Schools and Libraries Program, commonly known as the E-rate Program, helps ensure that schools and libraries can obtain high-speed internet access and telecommunications at affordable rates. Each year, the E-rate program offers over \$3.9 billion to bring

internet services to classrooms and libraries, providing discounts ranging from 20 to 90 percent to eligible schools and libraries on eligible products and services. LBL can assist districts to apply for and track E-rate funding, while helping to make sure each district stays in compliance with program rules. Our application services include assisting applicants through the entire lifecycle of the E-rate application process as well as providing staff training and yearly reports on E-rate funding. LBL also offers additional services that include district needs assessments, project management and audit supports.



Special Education and Evaluation Services



Service: Special Education Administration/Consultation
Program: Special Education and Evaluation Services
How It's Funded: Tier 2
Contact: Laura Petschauer

This service is available to districts who require a licensed special education administrator to support their district. Services may include administrative functions of planning and managing special education programs, staffing and budgeting, supervision of staff, compliance review, professional development, state reporting, and consultation.



OTHER GRANTS & CONTRACTS

Cascade Regional Inclusive Grant

This contract through the ODE supports the Regional Program for students with low-incidence disabilities:

- Deaf/Hard of Hearing
- Audiology for Deaf/Hard of Hearing
- Traumatic Brain Injury
- Blind/Visually Impaired
- Severe Orthopedic Impairment
- Autism Spectrum Disorder



Service: Low-Incidence Disabilities
Program: Cascade Regional Inclusive Program
How It's Funded: Grants from Oregon Department of Education
Contact: Angie Greenwood

Early Intervention/Early Childhood Special Education

This contract through the Oregon Department of Education, supports the program for Early Intervention and Special Education services to young children, birth to five years. Early Intervention/Early Childhood Special Education staff provides consultation and instruction to families and young children with developmental delays and disabilities in a variety of settings through an Individualized Family Service Plans (IFSP).

The focus of Oregon's Early Intervention (EI) program is to build the family's capacity to meet the special needs of their child. EI services are available for children from birth to three years who have developmental delays in their cognitive, physical, communication, self-help, or social skills development. EI services are also provided to children who have medically diagnosed conditions that are likely to result in a developmental delay later in the child's development.

Most EI interventions are provided to the child within everyday routines, activities, and places within their natural environment. Family members or caregivers are shown strategies for teaching the child in situations where and when a skill is used. Early Childhood Special Education (ECSE) provides services for children from three years to entrance kindergarten who qualify for services due to a developmental delay or categorical disability. Children in ECSE have disabilities that significantly impact their developmental progress. Services are provided in community preschools, homes, and structured classrooms and are based on the unique special education needs of each child.

The focus of the ECSE program is on teaching the child needed skills in areas of developmental delay, preparing the child for a school setting, and incorporating intervention strategies into the child's day.

Service: Special Education
Program: Early Intervention/Early Childhood Special Education
How It's Funded: Grant from Oregon Department of Education from Student Success Act
Contact: Autumn Belloni, Debbie McPheeters and Kimberly McCutcheon-Gross

Juvenile Crime Prevention

The Juvenile Crime Prevention (JCP) grant funding is managed by the Linn County Juvenile Department. Family support liaisons assist students who are experiencing challenges to their success at home, school and in the community. The family support liaisons work closely with the family, school, health care providers and social service agencies to locate and access resources, organize support, develop skills and remove barriers so that children can come to school ready to learn.

Service: Family Support Liaison
Program: Strategic Partnerships for Student Success
How It's Funded: Grant from Juvenile Crime Prevention
Contact: Nancy Griffith

Long-Term Care and Treatment

The Long Term Care and Treatment (LTCT) contract through the Oregon Department of Education provides education services to students in residential and day treatment facilities.



Service: Education Services
Program: Long Term Care and Treatment
How It's Funded: Grant from Oregon Department of Education
Contact: Cathy Wright

Farm Home School - The Children’s Farm Home, a Trillium Family Services mental health facility, provides residential and day treatment mental health services to children and youth from our region and from around the state who have significant emotional and behavioral challenges. LBL provides educational services to children and youth primarily in middle school through high school.

Wake Robin School - This transitional program provides education services to children and youth admitted to the day treatment program located on the Children’s Farm Home campus, through a contract with ODE. Trillium Family Services provides the mental health services and LBL ESD provides the educational services. The program services children and youth, kindergarten through 12th grade.

Old Mill Center Classroom - This program, through a contract with ODE, provides education services to students in day treatment at the Old Mill Center for Children and Families in Corvallis, the mental health provider. The program services children and youth, kindergarten through 2nd grade.

Medicaid Administrative Claiming

With support from the Oregon Health Authority (OHA), LBL provides training and support to districts to complete the Medicaid Administrative Claiming survey three times a year. LBL interfaces with OHA to generate cost pools, process match payments and resolve questions.

LBL staff also participate in the Medicaid Administrative Claiming process. Funds generated are used to purchase 0.25 FTE for a family support liaison to work with students and families in the Early Intervention/Early Childhood Special Education program.

Service: District Support
Program: Strategic Partnerships for Students Success
How It's Funded: Grant from Oregon Department of Human Services
Contact: Nancy Griffith

Statewide Education Initiatives Account

Service: District Support
Program: Strategic Partnerships for Students Success
How It's Funded: Student Success Act
Contact: Nancy Griffith

The Statewide Education Initiatives Account (SEIA) provides support to districts in the implementation of their Student Investment Account (SIA) plans. LBL's plan will assist districts in meeting their SIA goals by providing school and systems improvement strategy support through partnerships that facilitate ongoing learning. Staff provide and assist with the use of data and strategies integral to improvement science. As a hub of information from ODE and other educational and mental health organizations, we communicate the latest information in regard to curriculum, initiatives and grants, professional development, and opportunities to work with other educators and service providers.

School Safety and Prevention Specialist

Service: District Support
Program: Strategic Partnerships for Students Success
How It's Funded: Grant from Oregon Department of Education
Contact: Nancy Griffith

This contract through the Oregon Department of Education offers training, assistance program/plan development, help to establish and coordinate school and community teams and provide ongoing consultation, training and technical assistance in Linn, Benton Lincoln and Lane counties. Three domains include: behavioral safety assessment, suicide prevention, and bullying and harassment prevention. This also includes promoting the use of the SafeOregon Tip Line.

Transition Network Facilitator

Service: District Support
Program: Special Education and Evaluation Services
How It's Funded: Grant from Oregon Department of Education
Contact: Laura Petschauer

This contract through the Oregon Department of Education provides support in developing partnerships between districts and agencies that support transition services for students with intellectual and developmental disabilities. The services are focused on providing educators and students in Lane, Linn, Benton, Lincoln, and Marion counties with information and services creating pathways toward independent living and employment in post school life. Services include teaching pre-employment transition skills for youth and young adults.



Youth Transition Program

The Youth Transition Program (YTP) is a structured partnership between local Vocational Rehabilitation offices and school districts to enhance transition services. The grant is used to support services which are designed to prepare high school youth with disabilities for employment or career related post-secondary education or training. Through a partnership, the University of Oregon provides technical assistance to students and schools, preparing the student to enter the work force, higher education or both.

Service: Student Support
Program: Special Education and Evaluation Services
How It's Funded: Grant from Oregon Department of Human Services
Contact: Laura Petschauer





APPENDIX

Business Services

Performance Goal #1

LBL ESD Goal 1: Support success for all students and their districts by delivering excellent, equitable, efficient, and cost effective services.

Consolidate and simplify financial information to make it more useful to operators.

Update tracking of Tier I and Tier II funds to make more transparent to districts.

Performance Goal #2

LBL ESD Goal 2: Foster positive relationships by strengthening communication within LBL ESD, with school districts, other organizations and communities.

Perform an assessment for each district to identify the areas and levels of business support needed in our component districts.

Human Resources

Performance Goal #1

LBL Goal 1: Support success for all students and their districts by delivering excellent, equitable, efficient, and cost effective services.

Ensure efficient and effective support to all staff and districts. Calibrate, communicate and crosstrain our roles to support each other.

Performance Goal #2

LBL Goal 2: Foster positive relationships by strengthening communication within LBL ESD, with school districts, other organizations, and communities.

Facilitate and organize ongoing training for districts in the areas of hiring, staff development and retention.

Cascade Regional Inclusive Services

Performance Goal #1

LBL Goal 1: Support success for all students and their districts by delivering excellent, equitable, efficient, and cost effective services.

Calibration of teams will help determine if amount and types of services currently allocated to "like" students are similar across individual service providers, districts and regions.

Performance Goal #2

LBL Goal 1: Support success for all students and their districts by delivering excellent, equitable, efficient, and cost effective services.

Increase partnership between CRIS and SEES programs to provide better services for ESD component districts.
Attend outreach visits to districts in addition to Fall Visits.

Early Intervention/Early Childhood Special Education

Performance Goal #1

LBL Goal 1: Support success for all students and their districts by delivering excellent, equitable, efficient, and cost effective services.

Eliminate educational inequities by creating cultures of rigorous teaching and learning.

Performance Goal #2

LBL Goal 1: Support success for all students and their districts by delivering excellent, equitable, efficient, and cost effective services.

Increase the number of children receiving services in a regular childhood program toward the state target of 36% as shown in the At-A-Glance Profile published by ODE in May of 2023. (Data in At-A Glance profile from May 2021 indicates 27.87% of students in Lincoln County, 34.18% in Benton County and 23.74% in Linn County are receiving services in a regular childhood program.)

Long Term Care and Treatment (LTCT)

Performance Goal #1

LBL Goal 1: Support success for all students and their districts by delivering excellent, equitable, efficient, and cost effective services.

Improve and increase communication and collaboration between LTCT Staff and Trillium Family Services through regular meetings with Trillium Program Managers and participating in First Friday events.

Performance Goal #2

LBL Goal 2: Foster positive relationships by strengthening communication within LBL ESD, with school districts, other organizations, and communities.

Improve trusting relationships between LTCT staff members and the LTCT Program Administrator.

Special Education and Evaluation Services (SEES)

Performance Goal #1

LBL Goal 1: Support success for all students and their districts by delivering excellent, equitable, efficient, and cost effective services.

Create Google form to gather data from parents and district staff, send out customer service/feedback survey after completion of each evaluation. Maintain an 85% or higher quality rating from both parents and district staff.

Performance Goal #2

LBL Goal 2: Foster positive relationships by strengthening communication within LBL ESD, with school districts, other organizations, and communities.

Increase partnership between SEES and CRIS to provide better services for ESD component districts. Increase staff recognition and praise based on Gallup Survey results. Strengthen communication skills among program staff in order to foster positive relationships.

Technology and Information Services

Performance Goal #1

LBL Goal 1: Support success for all students and their districts by delivering excellent, equitable, efficient, and cost effective services.

Define staff responsibilities to improve processes and deliver services more effectively, while promoting staff recognition and providing clear paths for career advancement.

Performance Goal #2

LBL Goal 2: Foster positive relationships by strengthening communication within LBL ESD, with school districts, other organizations, and communities.

Utilize multiple technologies and define processes to notify LBL staff, districts and other stakeholders of technology incidents.

Performance Goal #3

LBL Goal 3: Continue long-term financial stability.

Reduce time spent on supporting aging technologies and reduce cost by creating an inventory of technology assets, defining replacement cycles, and setting technology standards.

Strategic Partnerships for Student Success

Performance Goal #1

LBL Goal 1: Support success for all students and their districts by delivering excellent, equitable, efficient, and cost effective services.

Create a coordinated regional Behavioral Safety Framework that addresses the development of services and support for safety assessment processes, Suicide prevention, intervention and postvention plans, and crisis response protocols in districts.

Performance Goal #2

LBL Goal 2: Foster positive relationships by strengthening communication within LBL ESD, with school districts, other organizations, and communities.

Continuing the restructuring and combining of the Student & Family Support Services and Strategic Partnerships programs to better communicate with and provide services to districts.

ALSEA SCHOOL DISTRICT

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Interim Superintendent: Sean
Gallagher

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Sean Gallagher
Interim Superintendent

Tier 1

Data based on fiscal year 2021-2022

Special Education - Tier 1 Services by Student	ESD	ASD
Audiology Hearing Screenings	4,324	16
Audiology Evaluations	23	0
Mild/Moderate Special Ed Supports K-12 (PT)	104	0
Mild/Moderate Special Ed Supports K-12 (OT)	602	15
Mild/Moderate Special Ed Supports K-12 (Aug Comm)	212	0
In-Center Special Education Evaluations	159	0
In-District and Assigned Special Education Evaluations	427	14
Severe Disability Supports	160	1
Early Intervention Evaluations	354	1
Early Childhood Special Education Evaluations	409	4

Special Education - Tier 1 Services by Hours	ESD	ASD
Interpreter, District Requests	72	0
Interpreter, In-Center Evaluations	276	0
Translation, District Requests	354	0
Translation, In-Center Evaluations	136	0

Grants

Data based on fiscal year 2021-2022

EI/ECSE	ESD	ASD
Early Intervention Services	150	1
Early Childhood Special Education Services	749	2
Students Transitioned to Kindergarten	226	0

Cascade Regional - Low Incidence, High Needs	ESD	ASD
Vision	46	0
Hearing	61	1
Physical Therapy	45	0
Occupational Therapy	42	0
Autism Spectrum Disorder	617	16
Traumatic Brain Injury	14	0
Total # of K-12 Regional Low Incidence Disabilities	827	17

Other Services	ESD	ASD
Attendance	1,065	0
Behavior Specialist	112	7
Family Support Liaison	130	0
Youth Transition Services	0	0



CENTRAL LINN SCHOOL
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Candace Pelt
Superintendent

Tier 1

Data based on fiscal year 2021-2022

Special Education - Tier 1 Services by Student	ESD	CLSD
Audiology Hearing Screenings	4,324	59
Audiology Evaluations	23	0
Mild/Moderate Special Ed Supports K-12 (PT)	104	4
Mild/Moderate Special Ed Supports K-12 (OT)	602	10
Mild/Moderate Special Ed Supports K-12 (Aug Comm)	212	2
In-Center Special Education Evaluations	159	1
In-District and Assigned Special Education Evaluations	427	28
Severe Disability Supports	160	2
Early Intervention Evaluations	354	4
Early Childhood Special Education Evaluations	402	7

Special Education - Tier 1 Services by Hours	ESD	CLSD
Interpreter, District Requests	72	11
Interpreter, In-Center Evaluations	276	0
Translation, District Requests	354	69
Translation, In-Center Evaluations	136	0

Grants

Data based on fiscal year 2021-2022

EI/ECSE	ESD	CLSD
Early Intervention Services	150	2
Early Childhood Special Education Services	749	7
Students Transitioned to Kindergarten	226	5

Cascade Regional - Low Incidence, High Needs	ESD	CLSD
Vision	46	2
Hearing	61	0
Physical Therapy	45	3
Occupational Therapy	42	3
Autism Spectrum Disorder	617	8
Traumatic Brain Injury	14	0
Total # of K-12 Regional Low Incidence Disabilities	827	16

Other Services	ESD	CLSD
Attendance	1,065	21
Behavior Specialist	112	0
Family Support Liaison	130	3
Youth Transition Services	0	0



CORVALLIS SCHOOL DISTRICT
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Ryan Noss
Superintendent

Tier 1

Data based on fiscal year 2021-2022

Special Education - Tier 1 Services by Student	ESD	CSD
Audiology Hearing Screenings	4,324	914
Audiology Evaluations	23	2
Mild/Moderate Special Ed Supports K-12 (PT)	104	19
Mild/Moderate Special Ed Supports K-12 (OT)	602	84
Mild/Moderate Special Ed Supports K-12 (Aug Comm)	212	41
In-Center Special Education Evaluations	159	34
In-District and Assigned Special Education Evaluations	427	55
Severe Disability Supports	160	39
Early Intervention Evaluations	354	61
Early Childhood Special Education Evaluations	402	68

Special Education - Tier 1 Services by Hours	ESD	CSD
Interpreter, District Requests	72	0
Interpreter, In-Center Evaluations	276	36
Translation, District Requests	354	0
Translation, In-Center Evaluations	136	8

Grants

Data based on fiscal year 2021-2022

EI/ECSE	ESD	CSD
Early Intervention Services	150	13
Early Childhood Special Education Services	749	102
Students Transitioned to Kindergarten	226	32

Cascade Regional - Low Incidence, High Needs	ESD	CSD
Vision	46	12
Hearing	61	17
Physical Therapy	45	8
Occupational Therapy	42	8
Autism Spectrum Disorder	617	107
Traumatic Brain Injury	14	2
Total # of K-12 Regional Low Incidence Disabilities	827	155

Other Services	ESD	CSD
Attendance	1,065	112
Behavior Specialist	112	0
Family Support Liaison	130	0
Youth Transition Services	0	0



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Andy Gardner
Superintendent

Tier 1

Data based on fiscal year 2021-2022

Special Education - Tier 1 Services by Student	ESD	GAPS
Audiology Hearing Screenings	4,324	1,366
Audiology Evaluations	23	10
Mild/Moderate Special Ed Supports K-12 (PT)	104	27
Mild/Moderate Special Ed Supports K-12 (OT)	602	158
Mild/Moderate Special Ed Supports K-12 (Aug Comm)	212	76
In-Center Special Education Evaluations	159	71
In-District and Assigned Special Education Evaluations	427	78
Severe Disability Supports	160	41
Early Intervention Evaluations	354	115
Early Childhood Special Education Evaluations	402	135

Special Education - Tier 1 Services by Hours	ESD	GAPS
Interpreter, District Requests	72	3
Interpreter, In-Center Evaluations	276	139
Translation, District Requests	354	0
Translation, In-Center Evaluations	136	103

Grants

Data based on fiscal year 2021-2022

EI/ECSE	ESD	GAPS
Early Intervention Services	150	51
Early Childhood Special Education Services	749	251
Students Transitioned to Kindergarten	226	60

Cascade Regional - Low Incidence, High Needs	ESD	GAPS
Vision	46	8
Hearing	61	19
Physical Therapy	45	14
Occupational Therapy	42	14
Autism Spectrum Disorder	617	199
Traumatic Brain Injury	14	2
Total # of K-12 Regional Low Incidence Disabilities	827	256

Other Services	ESD	GAPS
Attendance	1,065	0
Behavior Consultant	112	63
Family Support Liaison	130	0
Youth Transition Services	0	0



HARRISBURG SCHOOL DISTRICT
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Bryan Starr
Superintendent

Tier 1

Data based on fiscal year 2021-2022

Special Education - Tier 1 Services by Student	ESD	HSD
Audiology Hearing Screenings	4,324	116
Audiology Evaluations	23	1
Mild/Moderate Special Ed Supports K-12 (PT)	104	3
Mild/Moderate Special Ed Supports K-12 (OT)	602	14
Mild/Moderate Special Ed Supports K-12 (Aug Comm)	212	7
In-Center Special Education Evaluations	159	3
In-District and Assigned Special Education Evaluations	427	23
Severe Disability Supports	160	6
Early Intervention Evaluations	354	9
Early Childhood Special Education Evaluations	402	9

Special Education - Tier 1 Services by Hours	ESD	HSD
Interpreter, District Requests	72	0
Interpreter, In-Center Evaluations	276	0
Translation, District Requests	354	221
Translation, In-Center Evaluations	136	0

Grants

Data based on fiscal year 2021-2022

EI/ECSE	ESD	HSD
Early Intervention Services	150	2
Early Childhood Special Education Services	749	15
Students Transitioned to Kindergarten	226	3

Cascade Regional - Low Incidence, High Needs	ESD	HSD
Vision	46	0
Hearing	61	1
Physical Therapy	45	3
Occupational Therapy	42	3
Autism Spectrum Disorder	617	14
Traumatic Brain Injury	14	2
Total # of K-12 Regional Low Incidence Disabilities	827	23

Other Services	ESD	HSD
Attendance	1,065	70
Behavior Consultant	112	18
Family Support Liaison	130	5
Youth Transition Services	0	0



LEBANON SCHOOL DISTRICT
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Jennifer Meckley
 Superintendent

Tier 1

Data based on fiscal year 2021-2022

Special Education - Tier 1 Services by Student	ESD	LCS
Audiology Hearing Screenings	4,324	438
Audiology Evaluations	23	1
Mild/Moderate Special Ed Supports K-12 (PT)	104	18
Mild/Moderate Special Ed Supports K-12 (OT)	602	76
Mild/Moderate Special Ed Supports K-12 (Aug Comm)	212	18
In-Center Special Education Evaluations	159	16
In-District and Assigned Special Education Evaluations	427	42
Severe Disability Supports	160	21
Early Intervention Evaluations	354	48
Early Childhood Special Education Evaluations	402	49

Special Education - Tier 1 Services by Hours	ESD	LCS
Interpreter, District Requests	72	0
Interpreter, In-Center Evaluations	276	8
Translation, District Requests	354	111
Translation, In-Center Evaluations	136	0

Grants

Data based on fiscal year 2021-2022

EI/ECSE	ESD	LCS
Early Intervention Services	150	25
Early Childhood Special Education Services	749	110
Students Transitioned to Kindergarten	226	35

Cascade Regional - Low Incidence, High Needs	ESD	LCS
Vision	46	6
Hearing	61	5
Physical Therapy	45	3
Occupational Therapy	42	3
Autism Spectrum Disorder	617	47
Traumatic Brain Injury	14	1
Total # of K-12 Regional Low Incidence Disabilities	827	65

Other Services	ESD	LCS
Attendance	1,065	513
Behavior Consultant	112	0
Family Support Liaison	130	0
Youth Transition Services	0	0



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Dr. Karen Gray
Superintendent

Tier 1

Data based on fiscal year 2021-2022

Special Education - Tier 1 Services by Student	ESD	LCSD
Audiology Hearing Screenings	4,324	685
Audiology Evaluations	23	4
Mild/Moderate Special Ed Supports K-12 (PT)	104	19
Mild/Moderate Special Ed Supports K-12 (OT)	602	153
Mild/Moderate Special Ed Supports K-12 (Aug Comm)	212	40
In-Center Special Education Evaluations	159	6
In-District and Assigned Special Education Evaluations	427	73
Severe Disability Supports	160	18
Early Intervention Evaluations	354	66
Early Childhood Special Education Evaluations	402	76

Special Education - Tier 1 Services by Hours	ESD	LCSD
Interpreter, District Requests	72	47
Interpreter, In-Center Evaluations	276	62
Translation, District Requests	354	85
Translation, In-Center Evaluations	136	14

Grants

Data based on fiscal year 2021-2022

EI/ECSE	ESD	LCSD
Early Intervention Services	150	33
Early Childhood Special Education Services	749	127
Students Transitioned to Kindergarten	226	40

Cascade Regional - Low Incidence, High Needs	ESD	LCSD
Vision	46	11
Hearing	61	9
Physical Therapy	45	9
Occupational Therapy	42	8
Autism Spectrum Disorder	617	136
Traumatic Brain Injury	14	1
Total # of K-12 Regional Low Incidence Disabilities	827	175

Other Services	ESD	LCSD
Attendance	1,065	0
Behavior Consultant	112	0
Family Support Liaison	130	0
Youth Transition Services	0	0



MONROE SCHOOL DISTRICT

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Bill Crowson
Superintendent

Tier 1

Data based on fiscal year 2021-2022

Special Education - Tier 1 Services by Student	ESD	MSD
Audiology Hearing Screenings	4,324	60
Audiology Evaluations	23	1
Mild/Moderate Special Ed Supports K-12 (PT)	104	2
Mild/Moderate Special Ed Supports K-12 (OT)	602	10
Mild/Moderate Special Ed Supports K-12 (Aug Comm)	212	2
In-Center Special Education Evaluations	159	3
In-District and Assigned Special Education Evaluations	427	14
Severe Disability Supports	160	1
Early Intervention Evaluations	354	6
Early Childhood Special Education Evaluations	402	8

Special Education - Tier 1 Services by Hours	ESD	MSD
Interpreter, District Requests	72	0
Interpreter, In-Center Evaluations	276	6
Translation, District Requests	354	38
Translation, In-Center Evaluations	136	7

Grants

Data based on fiscal year 2021-2022

EI/ECSE	ESD	MSD
Early Intervention Services	150	0
Early Childhood Special Education Services	749	12
Students Transitioned to Kindergarten	226	1

Cascade Regional - Low Incidence, High Needs	ESD	MSD
Vision	46	0
Hearing	61	1
Physical Therapy	45	2
Occupational Therapy	42	0
Autism Spectrum Disorder	617	8
Traumatic Brain Injury	14	0
Total # of K-12 Regional Low Incidence Disabilities	827	10

Other Services	ESD	MSD
Attendance	1,065	43
Behavior Consultant	112	0
Family Support Liaison	130	0
Youth Transition Services	0	0



PHILOMATH SCHOOL DISTRICT

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Susan Halliday

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Susan Halliday
Superintendent

Tier 1

Data based on fiscal year 2021-20212

Special Education - Tier 1 Services by Student	ESD	PSD
Audiology Hearing Screenings	4,324	217
Audiology Evaluations	23	1
Mild/Moderate Special Ed Supports K-12 (PT)	104	0
Mild/Moderate Special Ed Supports K-12 (OT)	602	22
Mild/Moderate Special Ed Supports K-12 (Aug Comm)	212	5
In-Center Special Education Evaluations	159	7
In-District and Assigned Special Education Evaluations	427	11
Severe Disability Supports	160	11
Early Intervention Evaluations	354	14
Early Childhood Special Education Evaluations	402	10

Special Education - Tier 1 Services by Hours	ESD	PSD
Interpreter, District Requests	72	0
Interpreter, In-Center Evaluations	276	15
Translation, District Requests	354	27
Translation, In-Center Evaluations	136	3

Grants

Data based on fiscal year 2021-20212

EI/ECSE	ESD	PSD
Early Intervention Services	150	7
Early Childhood Special Education Services	749	16
Students Transitioned to Kindergarten	226	13

Cascade Regional - Low Incidence, High Needs	ESD	PSD
Vision	46	2
Hearing	61	2
Physical Therapy	45	1
Occupational Therapy	42	0
Autism Spectrum Disorder	617	27
Traumatic Brain Injury	14	1
Total # of K-12 Regional Low Incidence Disabilities	827	33

Other Services	ESD	PSD
Attendance	1,065	0
Behavior Consultant	112	5
Family Support Liaison	130	48
Youth Transition Services	0	0



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Todd Miller
Superintendent

Tier 1

Data based on fiscal year 2021-2022

Special Education - Tier 1 Services by Student	ESD	SCSD
Audiology Hearing Screenings	4,324	94
Audiology Evaluations	23	0
Mild/Moderate Special Ed Supports K-12 (PT)	104	5
Mild/Moderate Special Ed Supports K-12 (OT)	602	8
Mild/Moderate Special Ed Supports K-12 (Aug Comm)	212	2
In-Center Special Education Evaluations	159	4
In-District and Assigned Special Education Evaluations	427	26
Severe Disability Supports	160	1
Early Intervention Evaluations	354	2
Early Childhood Special Education Evaluations	402	0

Special Education - Tier 1 Services by Hours	ESD	SCSD
Interpreter, District Requests	72	0
Interpreter, In-Center Evaluations	276	1
Translation, District Requests	354	0
Translation, In-Center Evaluations	136	0

Grants

Data based on fiscal year 2021-2022

EI/ECSE	ESD	SCSD
Early Intervention Services	150	2
Early Childhood Special Education Services	749	1
Students Transitioned to Kindergarten	226	1

Cascade Regional - Low Incidence, High Needs	ESD	SCSD
Vision	46	0
Hearing	61	2
Physical Therapy	45	1
Occupational Therapy	42	1
Autism Spectrum Disorder	617	5
Traumatic Brain Injury	14	1
Total # of K-12 Regional Low Incidence Disabilities	827	10

Other Services	ESD	SCSD
Attendance	1,065	0
Behavior Consultant	112	0
Family Support Liaison	130	27
Youth Transition Services	0	0



SCIO SCHOOL DISTRICT

38875 NW First Avenue
Scio, OR 97374

Phone: 503-394-3261

Fax: 503-394-3920

Superintendent: Steve Martinelli

martinellis@sciok12.org



Steve Martinelli
Superintendent

Tier 1

Data based on fiscal year 2021-2022

Special Education - Tier 1 Services by Student	ESD	SSD
Audiology Hearing Screenings	4,324	136
Audiology Evaluations	23	0
Mild/Moderate Special Ed Supports K-12 (PT)	104	3
Mild/Moderate Special Ed Supports K-12 (OT)	602	13
Mild/Moderate Special Ed Supports K-12 (Aug Comm)	212	4
In-Center Special Education Evaluations	159	3
In-District and Assigned Special Education Evaluations	427	17
Severe Disability Supports	160	4
Early Intervention Evaluations	354	3
Early Childhood Special Education Evaluations	402	3

Special Education - Tier 1 Services by Hours	ESD	SSD
Interpreter, District Requests	72	4
Interpreter, In-Center Evaluations	276	6
Translation, District Requests	354	0
Translation, In-Center Evaluations	136	0

Grants

Data based on fiscal year 2021-2022

EI/ECSE	ESD	SSD
Early Intervention Services	150	4
Early Childhood Special Education Services	749	53
Students Transitioned to Kindergarten	226	18

Cascade Regional - Low Incidence, High Needs	ESD	SSD
Vision	46	2
Hearing	61	0
Physical Therapy	45	0
Occupational Therapy	42	0
Autism Spectrum Disorder	617	8
Traumatic Brain Injury	14	0
Total # of K-12 Regional Low Incidence Disabilities	827	10

Other Services	ESD	SSD
Attendance	1,065	23
Behavior Consultant	112	19
Family Support Liaison	130	39
Youth Transition Services	0	0



SWEET HOME SCHOOL DISTRICT
 1920 Long Street
 Sweet Home, OR 97386
Phone: 541-367-7126
Fax: 541-367-7105
Superintendent: Terry Martin
terry.martin@sweethome.k12.or.us



Terry Martin
Superintendent

Tier 1

Data based on fiscal year 2022-2024

Special Education - Tier 1 Services by Student	ESD	SHSD
Audiology Hearing Screenings	4,324	223
Audiology Evaluations	23	3
Mild/Moderate Special Ed Supports K-12 (PT)	104	4
Mild/Moderate Special Ed Supports K-12 (OT)	602	39
Mild/Moderate Special Ed Supports K-12 (Aug Comm)	212	17
In-Center Special Education Evaluations	159	11
In-District and Assigned Special Education Evaluations	427	46
Severe Disability Supports	160	15
Early Intervention Evaluations	354	25
Early Childhood Special Education Evaluations	402	53

Special Education - Tier 1 Services by Hours	ESD	SHSD
Interpreter, District Requests	72	0
Interpreter, In-Center Evaluations	276	0
Translation, District Requests	354	0
Translation, In-Center Evaluations	136	0

Grants

Data based on fiscal year 2022-2024

EI/ECSE	ESD	SHSD
Early Intervention Services	150	4
Early Childhood Special Education Services	749	53
Students Transitioned to Kindergarten	226	18

Cascade Regional - Low Incidence, High Needs	ESD	SHSD
Vision	46	3
Hearing	61	4
Physical Therapy	45	2
Occupational Therapy	42	2
Autism Spectrum Disorder	617	42
Traumatic Brain Injury	14	4
Total # of K-12 Regional Low Incidence Disabilities	827	57

Other Services	ESD	SHSD
Attendance	1,065	283
Behavior Consultant	112	0
Family Support Liaison	130	8
Youth Transition Services	0	0



LBL Local Service Plan Addendum 2023-2025: Intergrated Guidance Technical Assistance

The ESD Mandate:

Through the Statewide Education Initiatives Account, each ESD received funds to provide technical assistance to districts in their region in support of the Student Investment Account, now included in the Integrated Guidance. There is flexibility in how ESD TA funds can be spent, but they must be spent on capacity building expenditures. (Funds cannot be used for direct student services.)

LBLESD	Student Success Act – SEIA
Outcome #1	Technical assistance for districts in their implementation of policies, systems, programs, and services that promote student social emotional wellbeing, mental health, engagement, and physical safety.
Outcome #2	Technical assistance for the continued implementation of and the identified key areas in district SIA plans via consulting, coaching, professional development, or other supports.
Outcome #3	Technical assistance in data collection and analysis that builds capacity, data literacy, and continuous improvement of schools and districts.
Outcome #4	Technical assistance to further and expand community engagement to meet the requirements of district SSA/SIA planning.
Outcome #5	Technical assistance for the growth and support of equity within each school district.
Strategy #1	Utilize a Regional Behavioral Health Plan to focus on district social, emotional, behavioral, and student engagement needs in-line with district planning. (Outcomes 1, 2, 5)
Strategy #2	Utilize a Continuous Improvement Team focused on building data literacy of district and school personnel through coaching and training, or provide systems planning and performance support for the systematic use of data in planning and decision making. (Outcomes 2, 3, 5)
Strategy #3	Utilize a Continuous Improvement Team to support implementation of District SIA processes and plans. (Outcomes 1, 2, 3, 4, 5)
Strategy #4	Utilize a Continuous Improvement Team to support implementation of District SIA processes and plans. (Outcomes 1-5)
Activities 2023-2025	SSA/Intergrated Guidance Coordinator and Associated Costs (Strategies 1-4) (required by stature)
	Behavioral Health System Facilitator and Coaches and Associated Cost (Strategies 1,4)
	Instructional Coaching and Mentoring Program and Associated Cost (Strategies 2,3,4)
	Engagement and Attendance Facilitator and Associated Cost (Stratagies 1-4)
	Professional Development - Regional Trainings (Strategies 2,3,4)
	CEL (Center for Educational Leadership) Coaching Contract (Strategies 2,3,4)
	DESSA (SEL) K-8 (Strategies 1,2)
	Rural/small school school Technical Assistance for <2000 ADMw (Temporary through 9/2024)
	Data Analyst Tech/Programming Support (Longitudinal Performance Growth Targets) (Strategies 2,4)
	Administrative Assistant Support
Indirect 5%	
Activities 2024-2025	SSA/Integrated Guidance Coordinator and Associated Costs (Strategies 1-4) (required by statute)
	Behavioral Health Systems Facilitator and Coaches and Associated Costs (Strategies 1,4)
	Instructional Coaching and Mentoring Program and Associated Cost (Strategies 2,3,4))
	Engagement and Attendance Facilitator and Associated Cost (Strategies 1-4)
	Professional Development - Regional Trainings (Strategies 1,4)
	DESSA (SEL) K-8 (Strategies 1,2)
	Data Analyst Tech/Programming Support (Longitudinal Performance Growth Targets) (Strategies 2,4)
	Administrative Assistant Support
	Indirect 5%

LBLEDSD works to support districts in the implementation of their Integrated Guidance plan.

The original SSA purpose:

1. Meet Students' health or safety needs. This may include supports from the following:

- (A) Social-emotional learning and development (SEB Coaches/Facilitator);*
- (B) Student mental and behavioral health (SEB Coaches/Facilitator);*
- (C) Improvements to teaching and learning practices or organizational structures that lead to better interpersonal relationships at the school (Engagement/Attendance Facilitator, Instructional & Mentor Coaches);*
- (D) Student health and wellness (SEB Coaches/Facilitator);*
- (E) Trauma-informed practices (SEB Coaches/Facilitator);*

2. Increase academic achievement, including reducing academic disparities for historically underserved students (Primarily Instructional & Mentor Coaches)

Each of the Activities were created based on the Strategies listed that support the overall Outcomes.

Strategy 1: Utilize a Regional Behavioral Health Plan to focus on district social, emotional, behavioral, and student engagement needs in-line with district planning. (Outcome 1, 2, 5)

Activity Associated

- SSA Coordinator
- Regional Behavioral Health Systems Facilitator
- Social Emotional Behaviors Coaches
- Engagement/Attendance Facilitator
- Professional Development
- DESSA

Strategy 2: Utilize a Continuous Improvement Team focused on building data literacy of district and school personnel through coaching and training, or provide systems planning and performance support for the systematic use of data in planning and decision making. (Outcome 2, 3, 5)

Activity Associated

- SSA Coordinator
- Instructional Coaching/Mentor
- Engagement/Attendance Facilitator
- SEB Coaching
- Data Analyst Tech/Programming Support (Longitudinal Performance Growth Targets)
- Professional Development

Strategy 3: Utilize a Continuous Improvement Team to support implementation of District SIA processes and plans. (Outcome 1, 2, 3, 5)

Activity Associated

- SSA Coordinator
- Instructional Coaching/Mentor
- Engagement and Attendance Facilitator
- Professional Development

Strategy 4: Utilize a Continuous Improvement Team to support implementation of District SIA processes and plans. (Outcomes 1-5)

Activity Associated:

- SSA Coordinator
- All Coaches & Facilitators
- Dada Analyst Tech/Programming Support (Longitudinal Performance Growth Targets)
- Professional Development

As outlined in statute, at least 90% of the annual State School Fund (SSF), property tax and other qualifying resources allocated to LBL will be expended on resolution services. The Local Service Plan is developed with the State School fund biennium budget. Districts review and approve the Local Service Plan on an annual basis. Services will be provided on a two-tiered basis.

Tier 1 Resolution Services

Tier 1 includes services that are available to all 12 districts and are determined as being essential to all districts. The emphasis in Tier 1 is on achieving the greatest economies of scale and assuring equity of access. Tier 1 services are fully funded from the 90% SSF allocation. Service decisions are made for a two year period.

Tier 2 Resolution Services

Once Tier 1 funds are allocated, the remaining balance is used for Tier 2 services. Tier 2 services are decided by districts on an annual basis. This allows LBL and its component school districts to stay within the constraints of the agreements, yet provide flexibility in the use of funds.

Transits

Up to 50% of the district’s allocated Tier 2 resources may be used to acquire services from sources other than LBL if the service is not provided by LBL.

Statewide Education Initiatives Account (SEIA)

The SEIA grant provides funding to allow greater ESD support to districts. This includes the provision of technical assistance to districts in developing, implementing and reviewing a plan for receiving Student Investment Account grant money; and providing coordination with Oregon Department of Education in administering and providing technical assistance to districts, including coordinating any coaching programs. SEIA plans are adopted and amended as part of the Local Service Plan and approved by the Oregon Department of Education.

The _____ School District is in agreement to have the Linn Benton Lincoln Education Service District provide the Local Service Plan for the 2023-2024 school year as presented.

LBL Board Chair

Date

School District Board Chair

Date

As outlined in statute, at least 90% of the annual State School Fund (SSF), property tax and other qualifying resources allocated to LBL will be expended on resolution services. The Local Service Plan is developed with the State School fund biennium budget. Districts review and approve the Local Service Plan on an annual basis. Services will be provided on a two-tiered basis.

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The Corvallis School District is in agreement to have the Linn Benton Lincoln Education Service District provide the Local Service Plan for the 2023-2024 school year as presented.



LBL Board Chair

1/18/23

Date



School District Board Chair

2/9/23

Date

X. BOND UPDATE



Corvallis

SCHOOL DISTRICT

Prepared for: Corvallis School Board
Prepared by: Kim Patten, Director of Facilities and Transportation
Meeting Date: February 9, 2023

Bond Program Update

NO ACTION REQUIRED

Background

Wenaha Group provides project management services for the Facilities Improvement Bond approved by voters in May 2018. Wenaha Group's project managers will prepare a monthly report to communicate status and progress on bond projects. The report will be included in a board packet each month, published on the district website, and shared with key communicators.

Direct questions regarding bond projects to kim.patten@corvallis.k12.or.us



CORVALLIS SCHOOL DISTRICT BOND PROGRAM UPDATE FEBRUARY 9, 2023



GENERAL PROGRAM UPDATES

For the past few months, the team has been aware of increasing cost forecasts for projects that are not completed. To date, we have been able to operate within available bond funds. This month, forecasts indicate that we are projecting to use all of the available bond program reserves. The Bond Leadership team is acting to mitigate the issue by auditing recent cost reports, negotiating with our contractors, and looking for ways to increase revenues by grants or other available budget items.

As a reflection, the bond program has accomplished amazing work in a time of escalating costs, a decreasing labor pool, the wildfires, and the impacts of Covid. Of note, the program is now in the fifth year, and these last three years have been extraordinary compared to the historic flow of construction projects. Leadership is confident that with a combination of cost trimming and additional revenue, we will still complete all bond promises.

The district opted to utilize the CM/GC (Construction Manager/General Contractor) process for building all of the major projects except for College Hill, which was a lump sum bid process. CM/GC was chosen for most of the projects because of the following advantages:

- Flexibility on scope,
- Educational impacts more easily mitigated,
- Quick solutions when needed,
- Very easy for the project team to direct contractors to “just do it” when an urgent piece of work is needed for a school opening,
- Helps facilitate opening buildings even with crunched timelines,
- A close construction partner that is always looking out for the interests of students and the district.

The CM/GC process has drawbacks, and we are experiencing some of these now:

- The flexibility on scope also creates lingering paperwork, particularly when schedules are compressed and construction personnel are running beyond full capacity,
- As our contractors close out their projects from peak work periods, they are discovering legitimate cost items that require reimbursement,
- These late cost items require a collaborative approach to financial close-out of the projects, which can take time.

As reported last month, the recent contractor personnel change has illuminated significant new cost items as noted above. Wenhaha Group project managers are always tracking known items, but were unaware of all of the contractor-directed items that were outside of the typical cost management structure. An example of this would be the contractor field-directing a subcontractor to perform some



CORVALLIS SCHOOL DISTRICT BOND PROGRAM UPDATE FEBRUARY 9, 2023



additional work outside of their contract. It is incumbent on the contractor to track both direction and cost for such extra work, but this did not occur in all cases, partly due to compressed schedules and overloaded staff.

Bond leadership and our project managers will continue to work with the contractors to close-out the projects, and accurately forecast the completion of buildings that are still under construction.



The Corvallis School District Student Construction Program toured their school under renovation and visited the Wenaha trailer for some practical discussions about career opportunities, pathways and pay rates. There is a serious shortage of workers in the construction industry, so these young people will be welcome!

Thanks to our partners at Todd Construction and Fortis Construction for helping with this event!



CORVALLIS SCHOOL DISTRICT BOND PROGRAM UPDATE FEBRUARY 9, 2023

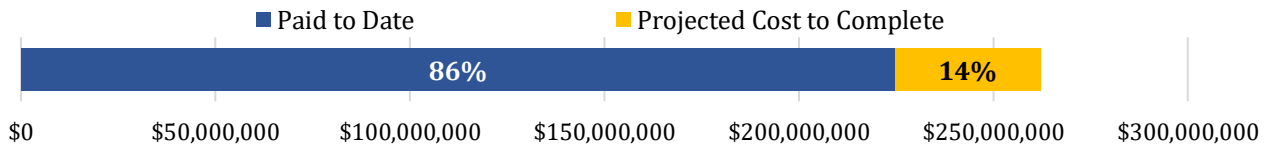


FINANCIAL SUMMARY AS OF DECEMBER 31, 2022

Voter Approved Bond Issuance	\$ 199,914,046
Bond Sale Premium	39,204,888
Bond Interest Earnings	10,670,419
OSCIM Grant ¹	6,234,147
Other Funding ²	4,744,844
Projected Resources through End of Program	1,249,000
Total Program Resources	\$262,017,344

Paid to Date	\$ 224,702,013
Projected Cost to Complete	37,315,331
Total Projected Costs	\$ 262,017,344
Unallocated Program Reserves	-
Total Program Requirements	\$ 262,017,344

- ¹ **Oregon School Capital Improvement Matching (OSCIM) Grant.** Matching grant through this state program; restricted to Lincoln project.
- ² **Other Funding.** Additional grants and reimbursements from several sources including energy conservation reimbursements, seismic rehabilitation grants, High School Success grant; community solar investments; ODE Facility Grants; and Designated Facilities Fund; restricted to specific projects.
- ³ **Projected Resources through End of Program.** Energy conservation reimbursements, community solar investments, and resources from High School Success grant.



	Bond Allocation	Other Funding Sources ¹		Total Projected Costs ²	Paid to Date		Projected Cost to Complete
		allocated	pending allocation				
Adams	\$ 11,594,457	\$ 984,337	\$ 6,730,873	\$ 19,309,667	\$ 11,827,483	61%	\$ 7,482,184
Garfield	20,431,066	5,190,718	(6,491)	25,615,293	25,615,292	100%	1
Bessie Coleman	38,462,382	(579,081)	1,407,410	39,290,710	38,279,334	97%	1,011,376
Kathryn Jones H	12,322,158	6,632,864	345,323	19,300,345	18,751,044	97%	549,301
Lincoln	32,068,849	6,441,880	1,407,687	39,918,416	39,710,795	99%	207,621
Mt View	8,904,029	8,146,119	(250,243)	16,799,905	5,968,818	36%	10,831,087
Leticia Carson	11,807,766	6,319,325	38,140	18,165,231	17,625,939	97%	539,292
Franklin	8,897,336	2,520,420	871,701	12,289,457	9,749,175	79%	2,540,282
Cheldelin	9,992,479	315,343	1,768,452	12,076,274	11,113,335	92%	962,939
Linus Pauling	400,000	9,572	125,639	535,211	535,369	100%	(158)
Corvallis	7,982,711	2,446,011	42,345	10,471,067	10,202,922	97%	268,145
Crescent Valley	16,226,898	4,348,963	(84,100)	20,491,761	20,252,107	99%	239,654
Harding	11,208,697	4,628,359	(111,607)	15,725,449	4,771,365	30%	10,954,084
Program Administration	9,615,219	1,484,671	928,668	12,028,558	10,299,036	86%	1,729,522
TOTAL	\$199,914,046	\$ 48,889,501	\$ 13,213,797	\$262,017,344	\$ 224,702,013	86%	\$ 37,315,331

¹ **Other Funding Sources.** Includes bond sale premium, bond interest earnings, OSCIM grant, High School Success grant, ODE Facilities Grants, and other funding such as energy conservation reimbursements from the SB 1149 program or Energy Trust of Oregon, and seismic rehabilitation grants.

² **Risk Associated with Projection.** Low - Complete/Nearing Completion Medium - Under Contract



**CORVALLIS SCHOOL DISTRICT
BOND PROGRAM UPDATE
February 9, 2023**



ADAMS ELEMENTARY SCHOOL
MAJOR ADDITION AND REMODEL

Project Manager: Kieron Spellman
Wenaha Group

Architect: DLR Group

CM/GC Contractor: Fortis Construction

PROJECT DESCRIPTION

Add five (5) permanent classrooms, create collaborative/small group learning areas, create dedicated PE space by adding multi-use cafeteria, renovate existing classroom space for student support services, improve ADA accessibility, install energy efficient lighting, replace covered play shelter, upgrade finishes in hallways and shared spaces including floors, paint, and ceilings, upgrade mechanical infrastructure including electrical, heating, and plumbing systems, replace emergency communication systems, secure front entry, and office modifications.

SCHEDULE

Key Milestones	Start	Completion	% Complete	Comments
Pre-Design	Nov 2018	Oct 2019	100%	
Design & Permitting	Nov 2019	Dec 2021	100%	
Construction	April 2022	June 2023	70%	

CURRENT ACTIVITIES

- Administration: Turned over and being used by the school.
- Music Room: Framing the hard ceiling lid has been completed and drywall is being installed. Finishes will commence shortly.
- New Addition:
 - Roof sheathing is complete.
 - Roofing: approx. 75% of roofing has been installed to the extent roof sheathing exists.
 - Waterproofing of exterior walls is continuing, window flashings and window installation following after. Windows installed in all the classrooms.
 - Interior MEP has continuing. A “box walk” to ensure proper locations for electrical and data wiring for the five classrooms took place this week and a few locations were modified.
 - Sheetrock in the five classrooms will commence next week.
- Covered Play Structure: Roofing scheduled to be installed this week.
- A temporary boiler has been installed to serve heat to the existing structure. New Boilers and associated pipe work are being installed and switch over to permanent boilers will occur over spring break.



CORVALLIS SCHOOL DISTRICT BOND PROGRAM UPDATE February 9, 2023



- Gymnasium: Has been turned over to staff to be used. The gym striping was not completed, and Fortis will close the gym either during spring break or summer to complete this scope.

ACTIVITIES SCHEDULED FOR NEXT QUARTER

- Continuing to build-out of music room and new addition.
- New addition is scheduled to be completed by the end of May.

HIGHLIGHTS – n/a

CHALLENGES AND SOLUTIONS – n/a

PROJECT PHOTO GALLERY



Exterior views of the new addition and trash enclosure. Note the temporary heat used to keep the project moving during the cold weather.



CORVALLIS SCHOOL DISTRICT BOND PROGRAM UPDATE February 9, 2023



Interior work progressing nicely. Gym is being used, and striping and floor finishes to occur over spring break. Classrooms and kitchen/commons areas are ready for sheetrock.



**CORVALLIS SCHOOL DISTRICT
BOND PROGRAM UPDATE
February 9, 2023**



**BESSIE COLEMAN ELEMENTARY SCHOOL
REPLACEMENT SCHOOL**

**Project Manager: Kieron Spellman
Wenaha Group
Architect: DLR Group
CM/GC Contractor: Fortis Construction**

PROJECT DESCRIPTION

Construct new two-story 67,466 square foot elementary school and demolish existing school. Create new play areas and fields once demolition is complete.

SCHEDULE

Key Milestones	Start	Completion	% Complete	Comments
Pre-Design	Aug 2018	Dec 2018	100%	
Design & Permitting	Jan 2019	March 2020	100%	
Construction			98%	
Phase 1	Summer 2020	Fall 2020	100%	Staging & Sitework
Modular Classrooms to be relocated onsite and building pad construction.				
Phase 2	Fall 2020	Winter 2021	99%	New Construction
Construction to be conducted during the school year with secure fencing separation from school.				
Phase 3	Spring 2022	Summer 2022	98%	Demolition & Sitework

CURRENT ACTIVITIES

- All PIPC (public improvements) work along Walnut has been completed except landscaping and connections at Aspen intersection.
- Ballfield: 4-6” of existing material was removed and replaced with new topsoil making an acceptable base for the grass. The field has been winterized and will be seeded during the next growing season in the spring.

ACTIVITIES SCHEDULED FOR NEXT QUARTER

- Complete installation of the Aspen intersection realignment.

CHALLENGES AND SOLUTIONS

- Aspen Street Realignment. – Waiting for the subcontractor to complete a project before they can return to complete the necessary underground conduit boring. Fortis and EC Company are also working to get all the temporary signal provisions in place that the City requested recently. Work is scheduled to be completed in early April.

Consultants are working with the city on traffic light operation and sequencing. Safe routes to school will be maintained.





**CORVALLIS SCHOOL DISTRICT
BOND PROGRAM UPDATE
February 9, 2023**



**CHELDELIN MIDDLE SCHOOL
MAJOR RENOVATION**

**Project Manager: Patrick Linhart
Wenaha Group
Architect: Pivot Architecture
Track Contractor: Field Turf USA
CM/GC Contractor: Gerding Builders**

PROJECT DESCRIPTION

Renovation: Renovate classroom to create a STEAM lab, renovate library/media center, improve ADA accessibility to the front office and elsewhere in the school, renovate cafeteria, renovate restrooms, replace kitchen flooring, upgrade mechanical infrastructure including electrical, heating, and plumbing systems, improve emergency lighting, improve seismic safety, replace wooden bleachers in the gym.

Resurface existing track: Scope also includes enlarging the high jump area to accommodate two jumping areas and improving drainage around the long jump area – complete.

SCHEDULE

Key Milestones	Start	Completion	% Complete	Comments
Pre-Design	Jan 2019	June 2019	100%	Complete
Design & Permitting	May 2019	March 2020	100%	Complete
Design & Permitting PH II	July 2020	Mar-design, Feb- May permit 2022	100%	Complete
Ph I Construction	June 2020	Aug 2021	100%	Complete
Ph II Construction	June 2022	Dec 2022	99%	Final testing

CURRENT ACTIVITIES

- Work continues with Testing and Air Balancing (TAB) and the commissioning. Given some conditions, we needed engineering direction on how to adjust. The process has stretched into a February completion.

ACTIVITIES SCHEDULED FOR NEXT QUARTER

- Install some roof curb blocking and reflash the roof curb during spring break during nice weather.
- Replace some air handler unit PEX piping with copper over spring break.



**CORVALLIS SCHOOL DISTRICT
BOND PROGRAM UPDATE
February 9, 2023**



COLLEGE HILL/HARDING CENTER
MAJOR ADDITION AND REMODEL

Project Manager: Patrick Linhart
Wenaha Group
Architect: Pivot Architecture
Contractor: Pending

PROJECT DESCRIPTION

Adds multi-use cafeteria/reception, renovate two (2) classrooms to support science and construction, improve ADA accessibility, renovate locker rooms, replace cabinetry in classrooms, replace roof and gutter system, upgrade mechanical infrastructure including electrical, heating, boilers and plumbing systems, improve emergency lighting, improve seismic safety, install access control system, replace emergency communication systems, replace fire monitoring system and add an outdoor covered classroom space.

SCHEDULE

Key Milestones	Start	Completion	% Complete	Comments
Pre-Design	Nov 2018	Feb 2019	100%	
Design for permitting	Jan 2021	Nov 2021	100%	
Permit- Historical, Land Use & Bldg	July 2021	Jun 2022	100%	
Construction	June 2022	Sept 2023	45%	Drywall install & seismic

CURRENT ACTIVITIES

- After a couple of revisions with the city, our final sewer connection work has completed. We have also completed the water line connection where scheduled.
- We have placed the 10 ft multi-use pedestrian path as far as we can reasonably go until PPL moves their pole along Polk.
- Substantial progress has been made in the new reception space (see photos below). New exposed beams have been installed and shoring has been removed to make way for continued work on our slab placements.
- PP&L didn't make the end of year date as planned and as of this report, they have not completed the work. Teams continue to coordinate as best we can with the utility so work can proceed.
- Todd Construction continues to install seismic upgrade work ahead of drywall installations throughout the space.
- Our new boilers are not onsite here in January as expected, however we are due an update Feb 1st. It is not anticipated that this will impact the schedule.



CORVALLIS SCHOOL DISTRICT BOND PROGRAM UPDATE February 9, 2023



ACTIVITIES SCHEDULED FOR NEXT QUARTER

- Ceiling work will be in full swing next quarter.
- Mechanical and heating work will be going strong into March.
- Electrical service work should be complete on the site but work within the building will continue.

HIGHLIGHTS

- Progress continues to be made in all corners of the site and within the building. Drywall going in marks a swing toward reconstruction from here on out. Currently Todd has indicated that we are on schedule for an August move in for CSD.

CHALLENGES AND SOLUTIONS

- Sewer work was designed to allow for connection to the City's services. Redesign was needed due to missing existing connection points, which unfortunately pushed us into a wet season. More of the front grassy area was affected and will need to be repaired as a result.
- We still continue to find existing building construction that differs from the original drawings. The challenges are smaller and diminishing with frequency. We are now focused on finishes and how they align or flush out with existing conditions.

PROJECT PHOTO GALLERY

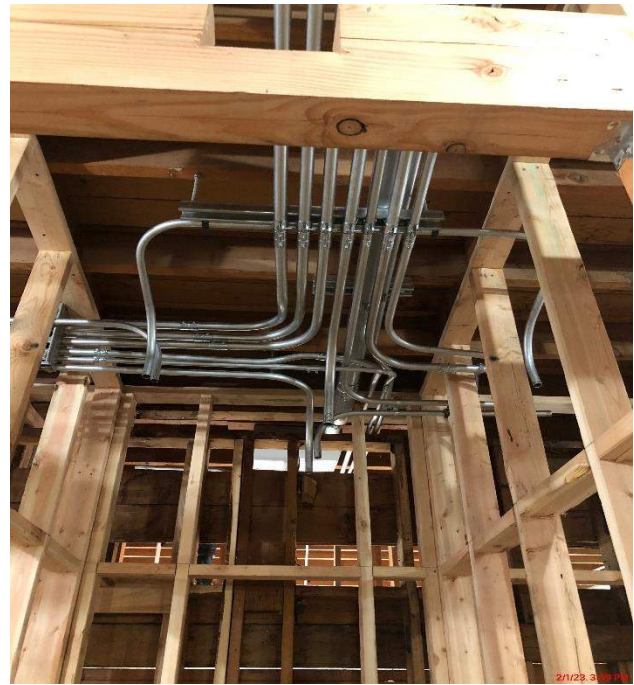
(next pages)



**CORVALLIS SCHOOL DISTRICT
BOND PROGRAM UPDATE
February 9, 2023**



CHHS – New Electrical Room Panels



CHHS – Electrical Rough-in



**CORVALLIS SCHOOL DISTRICT
BOND PROGRAM UPDATE
February 9, 2023**



CHHS – science room progress



CHHS – Bathroom fixture mounts in wall



**CORVALLIS SCHOOL DISTRICT
BOND PROGRAM UPDATE
February 9, 2023**



CHHS – Eating Reception Area from Gym



CHHS – Behavior Support Room



**CORVALLIS SCHOOL DISTRICT
BOND PROGRAM UPDATE
February 9, 2023**



CORVALLIS HIGH SCHOOL
MAJOR RENOVATION

Project Manager: Patrick Linhart
Wenaha Group
Architect: Pivot Architecture
CM/GC Contractor: Gerding Builders

PROJECT DESCRIPTION

Expand covered outdoor learning area for career technical education, renovate classroom spaces for career and technical education, improve softball facilities, including restroom and concessions, install ADA door openers, install covered walkway to applied technology buildings, replace artificial turf field, replace hallway carpet, replace roof on main building & replace greenhouse roof panels, resurface track, enhance video surveillance system, increase restroom connections to emergency generator, toilets & faucets, replace field lighting at Taylor Field.

SCHEDULE

Key Milestones	Start	Completion	% Complete	Comments
Pre-Design	Nov 2018	June 2020	100%	
Design & Permitting	June 2020	April 2021	100%	
Construction	Spring 2019	April 2021	100%	
Major Construction	April 2021	June 2022	100%	

CURRENT ACTIVITIES

- CSD teams are working with Convergent who is installing access controls for the AT buildings and a video intercom for the new covered bridge gate. This work is scheduled for completion by Feb 6th.
- Engineers are reviewing some minor ceiling support 2x materials around some new ductwork in T15. Repairs will likely include replacing a few 2x members and Simpson connection parts to tie to existing members.

ACTIVITIES SCHEDULED FOR NEXT QUARTER – N/A

HIGHLIGHTS – N/A

CHALLENGES AND SOLUTIONS – N/A

PROJECT PHOTO GALLERY – N/A



**CORVALLIS SCHOOL DISTRICT
BOND PROGRAM UPDATE
February 9, 2023**



**CRESCENT VALLEY HIGH SCHOOL
MAJOR RENOVATION**

**Project Manager: Patrick Linhart
Wenaha Group
Architect: Pivot Architecture
CM/GC Contractor: Gerding Builders**

PROJECT DESCRIPTION

Expand covered outdoor learning area for career technical education, renovate and expand classroom spaces for career and technical education, install a new artificial turf field, improve ADA accessibility, install elevator in gym building and replace main ramp for ADA access, refurbish, repair, and weatherize building exterior, Replace fire suppression system in kitchen, resurface bus drop-off/pick-up lane, resurface track, upgrade mechanical infrastructure including electrical, heating, and plumbing systems, enhance video surveillance system, improve seismic safety, increase power connections to generator circuit, replace access control system, and replace emergency communication systems.

SCHEDULE

Key Milestones	Start	Completion	% Complete	Comments
Pre-Design	Oct 2018	Dec 2018	100%	
Design & Permitting	Jan 2019	Mar 2020	100%	
Design & Permit Bldg A seismic	July 2020	Feb 2021	100%	
Construction Bldg F & elevator	June 2020	Dec 2021	100%	
Construction Bldg A seismic	June 2022	Aug 2022	100%	

CURRENT ACTIVITIES – UPDATED – On going design team & CSD are reviewing dust collector operations in relation to possible heat gain in the space.

ACTIVITIES SCHEDULED FOR NEXT QUARTER – N/A

HIGHLIGHTS – N/A

CHALLENGES AND SOLUTIONS – N/A

PROJECT PHOTO GALLERY – N/A





**CORVALLIS SCHOOL DISTRICT
BOND PROGRAM UPDATE
February 9, 2023**



FRANKLIN K-8
MAJOR REMODEL

Project Manager: Patrick Linhart
Wenaha Group
Architect: DLR Group
CM/GC Contractor: Fortis Construction

PROJECT DESCRIPTION

Create collaborative/small group learning areas, renovate 2 classrooms to support middle school science instruction, improve ADA accessibility, install energy efficient lighting, renovate restrooms, replace exterior windows, flagpole, kitchen flooring, and roof, upgrade finishes in hallways and shared spaces including floors, paint, and ceilings, upgrade mechanical infrastructure including electrical, heating and plumbing systems, improve emergency and exterior lighting, improve seismic safety, repair sidewalks, replace emergency communication systems, secure front entry, and office modifications.

SCHEDULE

Key Milestones	Start	Completion	% Complete	Comments
Pre-Design	Jan 2019	Dec 2020	100%	
Design & Permitting	Jan 2021	Mar 2021	100%	
Construction	Mar 2022	Dec 2022	96%	gym work & striping, operable wall, exterior painting

CURRENT ACTIVITIES

Work between now and Spring Break:

- Franklin staff continue to set up the new library, loading the shelves with books in an organized manner. Franklin reports they anticipate the library to be open for students closer to the end of February.
- We have current work activities happening between now and spring break:
 - We have added mirrors to install as soon as they arrive.
 - We have 2 exterior operable windows to install.
 - Our operable window at Office Manager’s space could deliver in early February and install over conferences. If not, we will install after school hours when it arrives.
 - Our overhead garage door could deliver February 2 and install over conferences. If not, it will install in the gym as soon as we have another 2-day window in March.



CORVALLIS SCHOOL DISTRICT BOND PROGRAM UPDATE February 9, 2023



- Once the weather warms up, we can perform our parking lot asphalt patching while we wait for the remaining electrical parts to complete the project this summer.

Spring Break scheduled work:

- Installation of our refinished wood wainscot will occur (to the fullest extent possible.) This will also trigger our ability to install more FRL and more tackable wall covering.
- Tackable wall covering installation is contingent upon new metal trim delivery currently anticipated prior to spring break.
- Gym acoustical wall panels are scheduled to install over spring break provided delivery happens as scheduled.
- Our new RTU and ERV (mechanical equipment) to service science and restrooms will install as soon as they arrive in late March or early April.

ACTIVITIES SCHEDULED FOR NEXT QUARTER

SUMMER WORK:

- Unit ventilator installations. – 6 more need to be swapped out in the north elementary wing. The work is too much to handle during the 1 week at spring break.
- Installation of final switchgear and transformer for 3 phase power completion. This will include wiring to the new panels once switchgear and other parts are installed.
- Exterior painting is scheduled for summer 2023 If we can pick off some during spring break, we will.

HIGHLIGHTS

- Remaining work activities are tightly scheduled and the construction team is chipping of items at every opportunity.
- The staff seems very happy with the new office arrangement and staff spaces, and they are functioning well.
- Staff also seems happy with the new science room space and they have been using the space already.

CHALLENGES AND SOLUTIONS

- The main electrical switch panels are still scheduled for delivery in August of 2023. We will install single phase converters where needed to allow specified equipment to operate while we wait for the electrical final parts.



**CORVALLIS SCHOOL DISTRICT
BOND PROGRAM UPDATE
February 9, 2023**



PROJECT PHOTO GALLERY



Franklin – Larger Collab space



**CORVALLIS SCHOOL DISTRICT
BOND PROGRAM UPDATE
February 9, 2023**



Franklin Staff Room Bench & Custom radiator covers



Franklin gym, a much brighter space!



**CORVALLIS SCHOOL DISTRICT
BOND PROGRAM UPDATE
February 9, 2023**



GARFIELD ELEMENTARY SCHOOL
MAJOR ADDITION AND REMODEL

Project Manager: Patrick Linhart
Wenaha Group
Architect: DLR Group
CM/GC Contractor: Fortis Construction

PROJECT DESCRIPTION

Addition of six (6) classrooms, create collaborative and small group learning areas, expand the library/media center, renovation of existing classroom spaces, add covered play shelter, improve ADA accessibility, renovate restrooms, repair concrete floor foundation, replace the kitchen flooring, upgrade finishes in shared spaces with floors, paint, and ceiling, secure front entry, office modifications, improve site circulation and parking, repair/replace sidewalk, seismic upgrades, fuel tank decommissioning and upgrades to mechanical, electrical, and plumbing.

SCHEDULE

Key Milestones	Start	Completion	% Complete	Comments
Pre-Design	Oct 2018	Jan 2019	100%	
Design & Permitting	Jan 2019	July 2020	100%	
Construction	May 2020	Aug 2021	100%	

CURRENT ACTIVITIES

- No Update - Project is complete



**CORVALLIS SCHOOL DISTRICT
BOND PROGRAM UPDATE
February 9, 2023**



KATHRYN JONES HARRISON ELEMENTARY Project Manager: **Kieron Spellman**
 MAJOR ADDITION AND REMODEL **Wenaha Group**
 Architect: **DLR Group**
 CM/GC Contractor: **Fortis Construction**

PROJECT DESCRIPTION

Add four (4) permanent classrooms, create collaborative/small group learning areas, create dedicated PE space by adding multi-use cafeteria, renovate existing classroom space for student support services, add ADA accessible restrooms in Life Skills classrooms, improve ADA accessibility, install energy efficient lighting, replace covered play shelter, upgrade finishes in hallways and shared spaces including floors, paint, and ceilings, upgrade mechanical infrastructure including electrical, heating, and plumbing systems, improve emergency lighting, improve site circulation and parking, replace emergency communication systems, replace sidewalk, secure front entry, and office modifications.

SCHEDULE

Key Milestones	Start	Completion	% Complete	Comments
Pre-Design	Nov 2018	Oct 2019	100%	
Design & Permitting	Nov 2019	May 2021	100%	
Construction	April 2021	June 2022	99%	

CURRENT ACTIVITIES

- PIPC paperwork submitted – Waiting for City to provide punch list to complete. Will complete as soon as we are in receipt.
- Commissioning: Final commissioning of access control to be completed at the end of February.
- Fortis has a few minor punch list items that are still incomplete. Working to complete within the next couple of weeks.

ACTIVITIES SCHEDULED FOR NEXT QUARTER

HIGHLIGHTS – N/A

CHALLENGES AND SOLUTIONS –

- City Rejected Rooftop Mechanical Screens: Manufacturer has provided costs and will have drawing package to Wenaha this week indicating what modifications can be





CORVALLIS SCHOOL DISTRICT BOND PROGRAM UPDATE February 9, 2023



made to alleviate the issue. These drawings will be sent to the City for review, and hopefully approval.

- After school being in session, it has been determined that there are a few additional site improvements needed:
 - Depth of swale to pond at front entrance – Capitol Engineering has revised plan into the city for review. They are also reviewing other solutions that might reduce costs.
 - Flooding at field – Issues have arisen with flooding at the end of the fire lane and east end of the field. Neighbors have contacted the City who have reviewed. Wenaha is having the area resurveyed to ensure that fire lane was constructed to correct grade. DLR is also reviewing to determine solutions.

PROJECT PHOTO GALLERY - N/A



**CORVALLIS SCHOOL DISTRICT
BOND PROGRAM UPDATE
February 9, 2023**



LETITIA CARSON ELEMENTARY SCHOOL
MAJOR ADDITION AND REMODEL

Project Manager: Kieron Spellman
Wenaha Group

Architect: DLR Group

CM/GC Contractor: Fortis Construction

PROJECT DESCRIPTION

Add three (3) permanent classrooms, create collaborative/small group learning areas, create dedicated PE space by adding multi-use cafeteria, renovate existing classroom space for student support services, improve ADA accessibility, install energy efficient lighting, replace covered play shelter, upgrade finishes in hallways and shared spaces including floors, paint, and ceilings, upgrade mechanical infrastructure including electrical, heating, and plumbing systems, enhance emergency communication systems, improve emergency lighting secure front entry, and office modifications.

SCHEDULE

Key Milestones	Start	Completion	% Complete	Comments
Pre-Design	Nov 2018	Oct 2019	100%	
Design & Permitting	Nov 2019	May 2021	100%	Permits received
Construction	April 2021	June 2022	99%	

CURRENT ACTIVITIES

- PIPC paperwork submitted. Waiting on City punchlist associated with the PIPC. This work will be completed ASAP, so PIPC can be signed off.
- Commissioning: Final commissioning of access controls will be completed at the end of February.
- Fortis has a few minor punch list items that are still incomplete. Working to complete within the next couple of weeks.

ACTIVITIES SCHEDULED FOR NEXT QUARTER

HIGHLIGHTS

CHALLENGES AND SOLUTIONS

- City Rejected Rooftop Mechanical Screens: Manufacturer has provided costs and will have drawing package to Wenaha this week indicating what modifications can be





CORVALLIS SCHOOL DISTRICT BOND PROGRAM UPDATE February 9, 2023



made to alleviate the issue. These drawings will be sent to the City for review and hopefully approval.

- **Playground Equipment:** The Playground is presently being installed and will be completed within next few weeks.

PROJECT PHOTO GALLERY – N/A



**CORVALLIS SCHOOL DISTRICT
BOND PROGRAM UPDATE
February 9, 2023**



LINCOLN ELEMENTARY SCHOOL
REPLACEMENT SCHOOL

Project Manager: Kieron Spellman
Wenaha Group

Architect: DLR Group

CM/GC Contractor: Fortis Construction

PROJECT DESCRIPTION

Construct new two-story 68,560 square foot elementary school and demolish existing school. Create new play areas and fields once demolition is complete.

SCHEDULE

Key Milestones	Start	Completion	% Complete	Comments
Pre-Design	Aug 2018	Dec 2018	100%	
Design & Permitting	Jan 2019	March 2020	100%	
Construction			99%	
Phase 1	Summer 2020	Summer 2020	100%	Staging/Sitework
Health Clinic to be relocated onsite. Temporary playground enhancement is being planned.				
Phase 2	Summer 2020	Summer 2021	99%	New Construction
Construction to be conducted during the school year with secure fencing separation from school.				
Phase 3	Summer 2021	Fall 2021	99%	Demolition/Sitework

CURRENT ACTIVITIES

- PIPC: Reviewed punch list with city and negotiating the repairs required. Receipt of final Certificate of Occupancy is dependent on this punch list.
- Complete One-year punch walk – Wenaha signing off warranty work completed.

ACTIVITIES SCHEDULED FOR NEXT QUARTER – N/A

HIGHLIGHTS – N/A

CHALLENGES AND SOLUTIONS –

- All landscaping has been turned over to CSD to maintain. Further work will take place regarding the field condition in the spring once the new growing season commences.
- Lighting Issues: All lighting issues have been completed.

PROJECT PHOTO GALLERY – N/A



**CORVALLIS SCHOOL DISTRICT
BOND PROGRAM UPDATE
February 9, 2023**



LINUS PAULING MIDDLE SCHOOL

RESURFACE TRACK

Project Manager: Wenaha Group

Architect: N.A.

Contractor: Field Turf USA

PROJECT DESCRIPTION

Resurface existing track. Additional scope includes enlarging the high jump area to accommodate two jumping areas, improving drainage around the long jump area, removing the pole vault pad and adding track surface to the javelin runway.

SCHEDULE

Key Milestones	Start	Completion	% Complete	Comments
Pre-Design	N.A	N.A.	N.A.	
Design & Permitting	Jan 2019	March 2019	100%	
Construction	June 2019	Aug 2019	100%	

CURRENT ACTIVITIES

- N/A

ACTIVITIES SCHEDULED FOR NEXT QUARTER

- N/A

HIGHLIGHTS

- N/A

CHALLENGES AND SOLUTIONS

- N/A

PROJECT PHOTO GALLERY

- N/A



**CORVALLIS SCHOOL DISTRICT
BOND PROGRAM UPDATE
February 9, 2023**



MOUNTAIN VIEW ELEMENTARY SCHOOL
MAJOR ADDITION AND REMODEL

Project Manager: Kieron Spellman
Wenaha Group

Architect: DLR Group

CM/GC Contractor: Fortis Construction

PROJECT DESCRIPTION

Add three (3) permanent classrooms, convert existing office to classroom space, create collaborative/small group learning areas, improve ADA accessibility, install energy efficient lighting, replace kitchen flooring, upgrade finishes in hallways and shared spaces including floors, paint, and ceilings, upgrade mechanical infrastructure including electrical, heating, and plumbing systems, enhance emergency communication systems, improve emergency lighting, improve seismic safety, improve site circulation and parking.

SCHEDULE

Key Milestones	Start	Completion	% Complete	Comments
Pre-Design	Dec 2018	Dec 2020	100%	
Design & Permitting	Jan 2021	Dec 2021	100%	
Construction	Apr 2022	August 2023	65%	

CURRENT ACTIVITIES

- Admin Addition:
 - All trusses and roof sheathing will be completed by the end of week.
 - Exterior walls are complete.
 - Interior wall framing is underway with mechanical penetrations through roof being constructed.
 - Roofing is scheduled to commence as soon as possible.
 - On schedule to be completed in May, so Admin modular can be removed before the start of summer activities.
- Art/Science Addition:
 - Roof sheathing is presently being installed.
 - Corridor roof framing commences next week.
 - Scheduled to be completed before the end of school year.
- Sector B Classrooms (Existing Bldg)
 - Roofing is complete.
 - All MEP rough in complete.
 - All walls are sheet rocked and in process of taping.



CORVALLIS SCHOOL DISTRICT BOND PROGRAM UPDATE February 9, 2023



- Painting and finishes to continue after taping.
- On schedule to turn over at March Conferences, so the existing office space within the building can have abatement work over spring break.

ACTIVITIES SCHEDULED FOR NEXT QUARTER

- Continue to build out the center core to turn over offices and classrooms.
- Continue to construct the structure for the Admin Suite addition.
- Continue to construct the Art Room classroom pod addition.
- The exterior site construction (parking, drive lanes, landscaping) will occur in the summer of 2023. Working on logistics plans to complete the water detention pond and install of the 40,000-gallon fire water storage tank before the end of school to ensure all the parking lots and drop off/pick up areas are able to be completed over the summer.

HIGHLIGHTS – N/A

CHALLENGES AND SOLUTIONS – N/A

PROJECT PHOTO GALLERY



New Administration Wing – View from area of new visitor parking



**CORVALLIS SCHOOL DISTRICT
BOND PROGRAM UPDATE
February 9, 2023**



New support classrooms and offices within the center area of the existing structure

XI. DIANE EFSEAFF MEMORIAL SCHOLARSHIP APPROVAL



Corvallis

SCHOOL DISTRICT

Prepared for: Corvallis School Board
Prepared by: Ryan Noss, Superintendent
Meeting Date: February 9, 2023

Oregon School Boards Association Diane Efseaff Memorial Scholarship Program

ACTION REQUESTED

Background

The Dianne Efseaff Memorial Scholarship Application for 2023-24 has been completed and will be sent to OSBA for consideration upon approval by the Board.

ACTION REQUESTED:

Approve participation in the half 2023-24 Diane Efseaff Memorial Scholarship Program.

MOTION REQUESTED:

“I move to approve participation in the half 2023-24 Oregon School Boards Association’s Diane Efseaff Memorial Scholarship Program.”



APPLICATION 2022

OSBA believes that school boards have an integral role to play in the continual improvement of student learning. We believe that role is a collaborative governance one with the superintendent/college president and a District Leadership Team (DLT), a cross section of staff including administrators,

teachers and classified staff from each level/building within the entity that helps provide guidance and support for improving student achievement. Participation in the Diane Efseaff Memorial Scholarship Program (DEMSP) includes meetings with the school board, superintendent/president and the DLT. If your system does not yet have a DLT, OSBA will help you in establishing one, and if your system has a DLT, we will help you learn how to integrate its work with the role of the school board.

District/ESD/Community College

Name of person submitting application

Title

Email address

Phone

This application also functions as your board's intent to participate. It is due to OSBA by **JUNE 1, 2022**. OSBA will announce selected applicants by July 1, 2022.

Boards selected through the Diane Efseaff Memorial Scholarship Program application process make a significant commitment of time to training and/or project work, which could result in a significant change in how the school board has done its work in the past. Selected boards that complete all aspects of the program (as described below) will receive either \$2,500 or \$5,000 of scholarship money to distribute to one or more students, depending on the program they select.

Boards may choose to participate in the full DEMSP or the half program. Each program is described on page 2 and 3.

**Program is dependent on approved funding by the OSBA board.*

FULL DEMSP:

This program is ideal for boards that have not completed OSBA’s Roles and Responsibilities trainings in the last 12 months, or that have had significant turnover on the board since last completing the training. It may also be ideal for boards that wish to develop/revise a board operating agreement, a board self-evaluation, or the superintendent/president evaluation process, and/or that desire to invest deeply in their own professional development.

Boards applying for this program must be willing to commit to a minimum of 18 hours of professional development/project work. DEMSP sessions must be scheduled as stand-alone special meetings and are not to be combined with other board business. Full board participation is expected at the DEMSP sessions (a quorum must be present).

Boards that complete the program will earn a \$5,000 scholarship to distribute to one or more students.

All participants must also complete a superintendent/president evaluation and the OSBA online board self-evaluation during the eligibility period.

A sample program outline is below:

SESSION	TOPIC	TIME COMMITMENT
Session 1	Facilitated planning session. Assessment of board training needs, setting expectations, designing project goals and outcomes, scheduling future sessions	Approx. 3 hours
Session 2	Customized board training	Approx. 3 hours
Session 3	Customized board training	Approx. 3 hours
Session 4	Project session 1 <i>(with District Leadership Team)</i>	Approx. 3 hours
Session 5	Project session2 <i>(with District Leadership Team)</i>	Approx. 3 hours
Session 6	Final project session <i>(with District Leadership Team)</i>	Approx. 3 hours

HALF DEMSP:

This program may be ideal for boards that have recently completed OSBA’s Basic Roles and Responsibilities trainings and have had no significant turnover on the board since last completing the training. It may also be ideal for boards that wish to expand on a previous scholarship project or complete a different project, or that have less time to commit to the board’s professional development.

Boards applying for this program must be willing to commit to a minimum of 12 hours of professional development/project work. DEMSP sessions must be scheduled as stand-alone special meetings and are not to be combined with other board business. Full board participation is expected at the DEMSP sessions (a quorum must be present).

Boards that complete the program will earn a \$2,500 scholarship to distribute to one or more students.

All participants must also complete a superintendent/president evaluation and the OSBA online board self-evaluation during the eligibility period.

A sample program outline is below:

SESSION	TOPIC	TIME COMMITMENT
Session 1	Facilitated planning session. Assessment of board needs for project, setting expectations, designing project outcomes, scheduling future sessions	Approx. 3 hours
Session 2	Project session 1 <i>(with District Leadership Team)</i>	Approx. 3 hours
Session 3	Project session 2 <i>(with District Leadership Team)</i>	Approx. 3 hours
Session 4	Final project session <i>(with District Leadership Team)</i>	Approx. 3 hours

BOARD PROJECT

Each participating board must complete a board project (to be approved by OSBA's Director of Board Development). The board project must be:

- Designed to impact student achievement for all students
- Relate to a potential, proposed or newly adopted district initiative

(Examples of this might include a districtwide implementation of AVID or Restorative Justice, creating/operationalizing a board equity lens, setting and implementing board professional development and district goals, and building a long-term monitoring plan for a newly adopted strategic plan.)

The first session of the DEMSP will be planning the project and learning how the principles of collaborative governance apply. The superintendent/president may be asked to build a District Leadership Team (DLT), a cross section of staff that can help provide guidance and support for improving student achievement, to meet with the board for project sessions.

The project sessions will be co-created with the OSBA facilitator and will address applicable research about how boards impact student achievement through policy and accountability by setting clear expectations (vision and goals), aligning and sustaining resources to meet goals, holding the system accountable by using and monitoring data, learning as a team, engaging with stakeholders and building public will.

OTHER REQUIREMENTS

The board must submit evidence that the board has formally agreed to apply for and, if selected, participate in the Diane Efseaff Memorial Scholarship Program as described in this application.

During the eligibility period (7/1/22 - 6/30/23), you must submit documentation of the following:

1. **Completed superintendent/president evaluation.** *Please note that the OSBA Targeted Feedback Survey is not included in the cost of the DEMSP.* If the participating board elects to conduct a Targeted Feedback Survey through OSBA as part of their superintendent/president evaluation, the costs for that service will be executed and invoiced under a separate service agreement.
2. **Completed board self-evaluation using the OSBA online balanced governance self-evaluation tool***. The full Board Self-Assessment Survey report and facilitation are included in the DEMSP.

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PRICING

PROGRAM	COST
Full DEMSP (minimum 6 sessions; 18 hours)	\$2,925 plus travel expenses <i>(mileage, travel time, meals and hotel, if applicable)</i>
Half DEMSP (minimum 4 sessions; 12 hours)	\$1,925 plus travel expenses <i>(mileage, travel time, meals and hotel, if applicable)</i>
Additional DEMSP-related session (if needed at the discretion of the facilitator)	No workshop cost; expenses only <i>(mileage, travel time, meals and hotel, if applicable)</i>

APPLICATION AND ACKNOWLEDGEMENTS

Please use the space below to respond to the following questions:

1. Identify whether the board is applying for the full DEMSP or the half DEMSP.

Select one:

Full program

Half program

2. Describe why the board wants to participate in the DEMSP and what the board hopes to learn by participating in this program. (For example, what are your greatest hopes for the system and board if selected to participate?)

3. Is there a specific aspect of student achievement you plan to impact through participation in this program?

4. List the board's professional development activities/trainings/conferences attended through OSBA, etc. within the last 24 months.

5. Please explain your current board governance practices and what you're hoping to change (if any) by implementing a collaborative governance model.

Please read and initial each item below:

_____ I acknowledge that I have read and understand all parts of the application.

_____ The board has formally agreed to apply for and participate in the DEMSP. A copy of the resolution, motion and/or board minutes is included as documentation.

_____ The board understands the time commitment involved in the DEMSP and has agreed to schedule DEMSP sessions with the facilitator as stand-alone special meetings (not combined with other agenda items). The board has agreed to devote approximately three hours to each session.

_____ The board has agreed to full board participation and to have at minimum a quorum present in each session with OSBA.

_____ The board has agreed to complete all project requirements by June 30, 2023.

_____ The board understands that all requirements of the DEMSP must be met before the district is awarded the \$5,000 or \$2,500 scholarship funds.

Signature of board chair

Date

DEMSP CHECKLIST

Use this checklist to check your progress on the DEMSP.

- Application submitted by **June, 1, 2022**. Included:
 - Completed application form and acknowledgements page
 - Board chair signature
 - Copy of minutes and/or resolution/motion documenting the board vote to apply for and participate in the DEMSP
- Roles and Responsibilities training(s) completed
(full program): _____
- Initial DEMSP session completed: _____
- Session #2 completed: _____
- Session #3 completed: _____
- Session #4 completed: _____
- Session #5 completed *(full program):* _____
- Session #6 completed *(full program):* _____
- Superintendent/president evaluation completed, and documentation sent to OSBA: _

- Board self-evaluation completed using the OSBA online self-evaluation tool: _

Please read and initial each item below:

SM I acknowledge that I have read and understand all parts of the application.

SM The board has formally agreed to apply for and participate in the DEMSP. A copy of the resolution, motion and/or board minutes is included as documentation.

SM The board understands the time commitment involved in the DEMSP and has agreed to schedule DEMSP sessions with the facilitator as stand-alone special meetings (not combined with other agenda items). The board has agreed to devote approximately three hours to each session.

SM The board has agreed to full board participation and to have at minimum a quorum present in each session with OSBA.

SM The board has agreed to complete all project requirements by June 30, 2023.

SM The board understands that all requirements of the DEMSP must be met before the district is awarded the \$5,000 or \$2,500 scholarship funds.

SM John F. McDonald

Signature of board chair

Feb. 9 2023

Date

XII. CONSOLIDATED ACTION

A. Appoint Budget Committee Member



Corvallis

SCHOOL DISTRICT

Prepared for: Corvallis School Board
Prepared by: Olivia Meyers Buch, Finance and Operations Director
Meeting Date: February 9, 2023

Budget Committee Appointments

ACTION REQUESTED

Background

On November 3, 2022, after staff solicited applications from the community, the School Board appointed four individuals to serve on the 2023 Budget Committee:

- Andrew Freborg for an additional three-year term ending June 30, 2025
- Aaron Rivers to a three-year term ending June 30, 2025
- Courtney Holgate-Champney to a three-year term ending June 30, 2025
- Andrea Thornberry to a one-year term ending June 30, 2023

Andrea Thornberry passed away December 18, 2022.

In January, district staff contacted the individuals who submitted applications during the initial solicitation period but were not appointed to inquire as to their ongoing interest and availability in serving on the Committee.

Three out of four applicants expressed ongoing interest. Their application materials are resubmitted for the Board's reference following this cover.

ACTION REQUESTED:

Appoint Niki Mendoza to a one-year term ending June 30, 2023.

MOTION REQUESTED:

"I move that Niki Mendoza be appointed to the Budget Committee for a one-year term ending June 30, 2023.



Corvallis

SCHOOL DISTRICT

2023 Budget Committee Application

Mr. **Brandon Konda** (He/Him)

[REDACTED]
Corvallis, OR 97333

Do you live within the Corvallis School District boundary area? **Yes**

Are you an Officer, Agent, or Employee of the District? **No**

Why are you interested in joining the Budget Committee?

My daughter is a 7th grader at Linus Pauling and my son will be attending in two years. I've operated my own independent financial planning practice for 12 years and have served on other boards, such as Orange County Head Start, as a financial expert. I am interested in learning more about how the school develops its budget and assisting in that process.

Please describe your professional/educational background related to this position.

**Bachelor of Science in History & Political Science at Kansas State University
Master of Public Administration from George Washington University
2 years of working as a congressional aide
14 years of working as a financial advisor
Series 6, 7, 63, 66 licensed
Accredited Investment Fiduciary designee**

OPTIONAL: Upload a letter of interest

No attachment.

OPTIONAL: Upload a resume

No attachment.

Entry ID: 3160

Entry Date: 10/18/22 20:39:12



Corvallis

SCHOOL DISTRICT

2023 Budget Committee Application

Mrs. **Niki Mendoza** (She/Her)

[REDACTED]
Corvallis, OR 97333
[REDACTED]

Do you live within the Corvallis School District boundary area? **Yes**

Are you an Officer, Agent, or Employee of the District? **No**

Why are you interested in joining the Budget Committee?

My childhood K-12 was in CSD. My mom [REDACTED] retired from CSD. I moved my family back to Oregon so that our children (now 5th and 8th) could return to CSD. We believe in being an active participant in our public school community, and the Budget is a critical part of that community.

Please describe your professional/educational background related to this position.

I graduated from UO in 1990 and from UO Law in 1994. I am a professional Mediator and Special Master and former litigating attorney. See PhillipsADR.com. I consistently seek consensus over conflict, and am able to work through and make tough decisions when necessary. I have served on community boards such as a large public middle school All-Star Board and a large community HOA Board, both in Southern California.

I would be honored to serve our most amazing community as part of the Budget Committee.

OPTIONAL: Upload a letter of interest

No attachment.

OPTIONAL: Upload a resume

No attachment.

Entry ID: 3155

Entry Date: 10/16/22 00:09:30



Corvallis

SCHOOL DISTRICT

2023 Budget Committee Application

Ms. **Jackie Rockwell** (She/Her)

[REDACTED]
Corvallis, OR 97333
[REDACTED]

Do you live within the Corvallis School District boundary area? **Yes**

Are you an Officer, Agent, or Employee of the District? **No**

Why are you interested in joining the Budget Committee?

I'd like to give back to the community and I'm also interested to see how the budget process works.

I have two, going on three kids attending schools within the district and I would like to be a part of the important decisions that affect the kids and families in Corvallis.

Plus I love numbers!

Please describe your professional/educational background related to this position.

I have worked in accounting for 14 years and I have owned and operated my own bookkeeping business for 8 years.

I have a Bachelors degree in Mathematics.

I have a Masters degree in Accounting and Financial Management.

I work with non-profits to track their spending against their budget, but this would be my first time on the other side of the budget, the creation side.

OPTIONAL: Upload a letter of interest

No attachment.

OPTIONAL: Upload a resume

No attachment.

Entry ID: 3154

Entry Date: 10/14/22 16:13:34

B. Corvallis High School Request to Fundraise



Corvallis

SCHOOL DISTRICT

Prepared for: Corvallis School Board
Prepared by: Ryan Noss, Superintendent
Meeting Date: February 9, 2023

Scoreboard Proposal Corvallis High School

ACTION REQUESTED

Background

Corvallis High School desires to replace the scoreboard at Bob Holt Stadium with a video scoreboard. The current scoreboard is approximately 25 years old, and replacement parts are no longer available. The cost of the proposed video scoreboard is \$166,000; funds for the project would be raised through anchor sponsorships and digital advertising on the scoreboard.

Policy DEDA, DEDA-AR acknowledges the desire for school-related fundraising and directs that following superintendent review and recommendation, proposals must be submitted to the Board for approval of amounts greater than \$75,000.

Approval of the fundraiser at the February 9, 2023, board meeting will allow Corvallis High School staff to move forward with the fundraising process.

ACTION REQUESTED

Authorize staff to fundraise for the scoreboard replacement at Corvallis High School.

MOTION REQUESTED

"I move to authorize staff to fundraise for the scoreboard replacement at Bob Holt Stadium at Corvallis High School."



CORVALLIS HIGH SCHOOL

Corvallis School District 509J

Matt Boring, Principal

Corvallis High School Request to Fundraise

Prepared by: Salvador Muñoz

Mission: To replace the Daktronics scoreboard with a Daktronics video scoreboard at Bob Holt Stadium. The current scoreboard is approximately 25 years old, and replacement parts are no longer available.

Purpose: With technology advancing daily, our students deserve to be a part of that shift at athletic facilities. Currently, our scoreboard only displays time and score for the football and soccer seasons (Sept.-Nov.). Upgrading to a video board will allow us to use the scoreboard during track season, as it can display lanes with times and marks of the different field events. The scoreboard will also be used during the middle school Meet of Champions event.

The video scoreboard will allow us to play videos during events at the stadium. This will be an opportunity to showcase our school and student groups. Through videos, we can share school campaigns and initiatives, public addresses, positive school messages, and other needs.

The best part about the videos is that students will have the opportunity to produce the content. Daktronics provides a curriculum through Daktronics Classroom that allows our students to create everything that will play at our events. Daktronics also connects students to colleges and universities where similar content is created; these students could have the opportunity to participate in walk-throughs and internships. Students will be able to gain experience in audio, video, content creation, and event production, creating a post-secondary pathway. This will look very good on college applications and help for future career aspirations while putting the school on the map for having a cutting-edge program available.

Corvallis High School would add this curriculum to Jayce Giddens' classes as he is interested in guiding students in this field. Currently, it would be incorporated into Advanced Photography. The hope would be to eventually create a Video Production class.

Cost: The cost of the video scoreboard is \$166,000. The project will be paid for with support from different groups and through the sale of scoreboard advertising. Daktronics offers the option of leasing to own. To have the best chance of sponsorships, leasing is our best option. This allows advertising sponsors to make payments over several years.

The project has the following verbal commitments:

- \$25,000 from a bank sponsor, paid upfront.
- \$10,000 from the Spartan Booster Club.
- \$10,000 from school discretionary funds.

There are a total of four anchor partners and unlimited digital sponsors as options for advertising. Two potential anchor partners have been identified. To secure the funds to pay off the video scoreboards, we need to sell four anchor spots and confirm 20 digital partners. If we secure this many, the scoreboard will be paid off in year three of the purchase agreement.

When the video scoreboard is paid off, revenue from sponsors will be used to supplement the District Athletic Budget at Corvallis High School.

This is a unique opportunity that can have a positive impact on more students, families, and the community.

C. Minutes

1. January 19, 2023

MINUTES
 Business Meeting of the
BOARD OF DIRECTORS
 Corvallis School District 509J

I. CALL TO ORDER AND ROLL CALL

The meeting was called to order at 6:35 p.m. in the Gymnasium of Lincoln Elementary School, 110 SE Alexander Avenue, Corvallis, OR 97333. The secretary recorded those present as listed below.

<p><u>BOARD MEMBERS PRESENT</u> Sarah Finger McDonald, Ph.D., Chair Shauna Tominey, Ph.D., Co-Vice Chair Luhui Whitebear, Ph.D., Co-Vice Chair Sami Al-Abdrabbuh, Ph.D. Terese Jones Vincent Adams Tina Baker</p> <p><u>BOARD MEMBERS EXCUSED</u></p>	<p><u>EXECUTIVE STAFF PRESENT</u> Ryan Noss, D.Ed., Superintendent Melissa Harder, Assistant Superintendent Olivia Meyers Buch, Finance and Operations Director Jennifer Duvall, Human Resources Director</p> <p><u>STUDENT REPRESENTATIVES PRESENT</u> Zoe DeAmicis Lucy Brown Emily Matsuba Celia Frazier</p>
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II. BOARD MEMBER REPORTS

Co-Vice Chair Whitebear reported attending several Board listening sessions and enjoyed hearing from community members and families.

Chair Finger McDonald Sarah reported attending several board listening sessions, expressed gratitude to all who took part, and looks forward to getting the report in March as an essential part of the goal-setting process. Additionally, she reported that as a liaison to the Corvallis Public Schools Foundation, she spoke to the finalist candidates for the executive director position.

Director Jones reported that the Bond oversight committee toured Adams Elementary School; it has been exciting to see the ongoing Bond work to transform schools into more dynamic learning spaces. Additionally, she encouraged the community to take opportunities to tour the buildings and see the results of the investment that our community made.

III. OREGON SCHOOL BOARDS ASSOCIATION (OSBA) AND NATIONAL SCHOOL BOARDS ASSOCIATION (NSBA) UPDATES

Director Al-Abdrabbuh is currently the President-Elect for the Oregon School Boards Association (OSBA), and a Board Director representing the Pacific Region at National School Boards Association (NSBA), and will share monthly updates with the Board. His update

included the following:

- I have an upcoming visit to Washington, DC, representing both OSBA and NSBA. I will be presenting at the equity symposium with Melissa Goff, Governor Kotek's Education Advisor regarding the challenges with Board member retention and how that could be an opportunity for diversity on boards of education.
- I will be joining with colleagues from across the state and country at NSBA's Advocacy Institute, where we will be meeting with Senators and Members of Congress at Capitol Hill to advocate for important issues for our schools, including full funding for IDEA to support students experiencing disabilities, support universal free lunch for all students, and other issues.

IV. SUPERINTENDENT'S REPORT

Superintendent Noss read from a written report and provided highlights, including updates regarding work on the student representative to the Board policy, the upcoming Bessie Coleman Elementary School renaming celebration, board engagement sessions, and the Hands Across Corvallis event. (The report is posted online with the informational packet of this meeting and will be filed with the official 2022-23 Board records.)

V. STUDENT REPRESENTATIVE REPORTS

Student representatives highlighted events and activities involving their schools over the past month.

VI. PUBLIC COMMENT

Claudio Cano, Lebanon, Dean of Students at Garfield Elementary School, represented staff from the District dual language elementary schools. Ms. Cano expressed appreciation for the Board's support of the dual language program highlighting bilingualism, culturalism, and equity and the hope that equity issues will stay at the forefront of the school board.

VII. CHARTER SCHOOL UPDATE

Josh Stauber, Executive Director of Muddy Creek Charter School, presented the annual report and engaged with the Board. (The report is posted online with the informational packet for this meeting and will be filed with the official 2022-23 Board records.)

Mr. Stauber offered the following responses to questions from the Board:

- The Muddy Creek Board will invest in bringing in someone from the outside to help with behavioral plans. Working to contract with someone, possibly OSU, with interests in mental health.
- Looking into bringing in a modular building for kids to be able to reset.
- District staff have come to support Muddy Creek staff with curriculum resources.
- Muddy Creek tends to attract families looking for something different from traditional District schools.
- Numbers of unvaccinated students are higher than average.
- Agricultural science teacher is in the second year; students visit Christmas tree farms and

filbert farms, and younger kids visit pumpkin patches and garden spaces. Kids see where food comes from at a young age.

VIII. BOND UPDATE

Kim Patten, Facilities and Transportation Director, and Kieron Spellman and Patrick Linhart, Project Managers, Wehana Group, provided a written report and a slide presentation to the Board on the bond program. (The report and slides are posted online with the informational packet of this meeting and will be filed with the official 2022-23 Board records.)

IX. POLICY JFCA - DRESS CODE POLICY - FIRST READ

Assistant Superintendent Melissa Harder brought the updated policy, with changes from a previous Board meeting, for further review. After discussing specific wording and equity concerns, it was determined that Assistant Superintendent Harder will make additional changes and reach out to OSBA and OSAA for further review before bringing the policy back to the Board.

Director Adams joined the meeting at 8:01 p.m.

The Board took a short break and then resumed the meeting.

X. PUBLIC HEARING FOR TESTIMONY REGARDING RESOLUTION NO. 23-0101 - SUPPLEMENTAL BUDGET FOR GENERAL FUND AND SPECIAL REVENUE FUND

There was no public testimony.

XI. RESOLUTION NO. 23-0101 - SUPPLEMENTAL BUDGET FOR GENERAL FUND AND SPECIAL REVENUE FUND

Olivia Meyers Buch, Director of Finance and Operations, provided a written report and highlighted some of the General Fund and Special Revenue Fund shifts for the Board. (The report is posted online with the information packet of this meeting and will be filed with the official 2022-23 Board records.)

MOTION:

It was moved by Director Adams and seconded by Director Jones that Resolution No. 23-0101 be adopted to amend budgeted resources and appropriations in the General Fund and Special Revenue Fund. The motion was moved on and unanimously approved.

XII. CONSOLIDATED ACTION

MOTION:

It was moved by Director Adams and seconded by Director Al-Abdrabbuh to approve the Consolidated Action items. The motion was voted on and unanimously approved.

- A. Readopt Budget Parameters** – (This document is posted online with the informational packet of this meeting and will be filed with the official 2022-23 Board records.)
- B. Policy KG-AR - Facility Usage Rules and Procedures** – (This document is posted online with the informational packet of this meeting and will be filed with the official 2022-23 Board records.)
- C. Minutes** – December 1, 2022, December 15, 2022 – (These documents are posted online with the informational packet of this meeting and will be filed with the official 2022-23 Board records.)
- D. Licensed Personnel Action** – (This document is posted online with the informational packet of this meeting and will be filed with the official 2022-23 Board records.)
- E. Board Policies**
 - 1. Policy JECB - Admission of Nonresident Students - Final Reading** – (This document is posted online with the informational packet of this meeting and will be filed with the official 2022-23 Board records.)

XIII. CONSOLIDATED INFORMATION

- A. Non-Licensed Personnel Information** – (This document is posted online with the informational packet of this meeting and will be filed with the official 2022-23 Board records.)
- B. November 2022 Financial Statement (Unaudited)** – (This document is posted online with the informational packet of this meeting and will be filed with the official 2022-23 Board records.)
- C. Virtual Charter School Enrollment Calculation** – (This document is posted online with the informational packet of this meeting and will be filed with the official 2022-23 Board records.)

XIV. BOARD MEMBER COMMENTS

There were no Board member comments.

XV. ADJOURNMENT

There being no further business before the Board, Chair Finger McDonald adjourned the meeting at 8:22 p.m.

Sarah Finger McDonald, Ph.D., Board Chair

Ryan Noss, D.Ed., Superintendent

Prepared By: Kim Nelson

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2. January 26, 2023

MINUTES
 Special Meeting of the
BOARD OF DIRECTORS
 Corvallis School District 509J

I. CALL TO ORDER AND ROLL CALL

The meeting was called to order at 6:30 p.m. in the Gymnasium of Lincoln Elementary School, 110 SE Alexander Avenue, Corvallis, OR 97333. The secretary recorded those present as listed below.

<p><u>BOARD MEMBERS PRESENT</u> Sarah Finger McDonald, Ph.D., Chair Shauna Tominey, Ph.D., Co-Vice Chair Sami Al-Abdrabbuh, Ph.D. Terese Jones Vincent Adams Tina Baker</p> <p><u>BOARD MEMBERS EXCUSED</u> Tina Baker Luhui Whitebear, Ph.D., Co-Vice Chair</p>	<p><u>EXECUTIVE STAFF PRESENT</u> Ryan Noss, D.Ed., Superintendent Melissa Harder, Assistant Superintendent</p>
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II. EXECUTIVE SESSION

The Board met in Executive Session at 5:15 p.m. under ORS 192.660(2)(d) to consult with persons designated to carry on labor negotiations.

III. SCHOOL BOARD RECOGNITION

January is School Board recognition month. Members of the District Camerata Orchestra, a combined orchestra from Corvallis and Crescent Valley High Schools, under the direction of Sarah Perkins, performed two pieces for the Board. The students performed “The Holberg Suite, Movement I and Movement III” by Edvard Grieg and “Mundial” by Abe Tsai (a current Crescent Valley High School student.)

Following the performance, Superintendent Noss expressed appreciation for all the Board does as volunteers in our community and for the work they have accomplished over the years.

IV. ACKNOWLEDGE BLACK HISTORY MONTH

Board members took turns reading aloud Resolution Number 21-0201 – Acknowledgement of Black History Month, celebrated annually during February. (The document is posted online with the information packet of this meeting and will be filed with the official 2022-23 Board records.)

V. OREGON SCHOOL BOARDS ASSOCIATION (OSBA) WORK SESSION - BOARD SELF-EVALUATION

Kristen Miles, Oregon School Boards Association, facilitated the work session. (The report and slides are posted online with the information packet of this meeting and will be filed with the official 2022-23 Board records.)

Board members had submitted their self-evaluations to the Oregon School Boards Association. Ms. Miles shared data from the past two years and facilitated discussion as the Board reflected on changes over the past year. There was a discussion on what to do with the information moving forward, including reviewing policy with an equity lens and including student and community voice in policy development.

The Board will receive the data from the community listening sessions at the next work session, using that information and the self-evaluation data to work on Board goals.

The Board took a break and then resumed the meeting.

VI. 2023-2025 LINN BENTON LINCOLN EDUCATION SERVICE DISTRICT LOCAL SERVICE PLAN - FIRST READ

Superintendent Noss shared information regarding the Local Service Plan, how it is developed, and the services provided through the Linn Benton Lincoln Education Service District (LBL ESD.) (The document is posted online with the information packet of this meeting and will be filed with the official 2022-23 Board records.)

Additionally, Superintendent Noss shared that Jason Hay, Assistant Superintendent, LBL ESD, will attend the February 9 Board meeting to answer questions from the Board.

VII. ADJOURNMENT

There being no further business before the Board, Chair Finger McDonald adjourned the meeting at 8:13 p.m.

Sarah Finger McDonald, Ph.D., Board Chair

Ryan Noss, D.Ed., Superintendent

Prepared By: Kim Nelson

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D. Licensed Personnel Action



Corvallis

SCHOOL DISTRICT

ADDENDUM

Prepared for: Corvallis School Board
Prepared by: Jennifer Duvall, Human Resources Director
Meeting Date: February 9, 2023

Licensed Personnel Action

ACTION REQUESTED

1. Issue:
 - a. Termination/Resignation/Layoff/Retirement

Name	Position	FTE	Building	Effective Date	Notes
Gonzalez, Isley	PE/HealthTeacher & Equity Coach	1.00	Cheldelin MiddleSchool	3/14/2023	Resignation
Hale, Aaron	Principal	1.00	Lincoln Elementary	6/30/2023	Resignation

MOTION REQUESTED:

“I move to approve the Licensed Personnel action as submitted.”

XIII. CONSOLIDATED INFORMATION

A. Non-Licensed Personnel Information



Corvallis

SCHOOL DISTRICT

Prepared for: Corvallis School Board
Prepared by: Jennifer Duvall, Director of Human Resources
Meeting Date: February 09, 20223

Non-licensed Personnel Information

NO ACTION REQUIRED

Recommendation to Hire

Name	Position	Hrs/FTE	Building	Start Date	Contract Status
Potts, Danielle	Food Service Assistant	4.00	Central Kitchen	01/09/2023	Regular/Probationary
Gray, Hayden	Educational Assistant - Lifeskills (WINGS)	7.00	Crescent Valley High School	01/24/2023	Regular/Probationary
Bazan-Alvarado, Rolando	Food Service Assistant	2.00	Philomath Elementary School	01/25/2023	Regular/Probationary
Zghal Khammar, Rabab	Educational Assistant 3	2.00	Letitia Carson Elementary	02/02/2023	Limited Term
Yednock, Joseph	Educational Assistant - Lifeskills	7.00	Kathryn Jones Harrison Elementary	02/20/2023	Limited Term
Pitzer, Kathleen	Manager Food/Nutrition Svcs	1.00 FTE	District Office	2/21/2023	Probationary Non Rep



Corvallis

SCHOOL DISTRICT

Termination/Resignation/Layoff/Retirement

Name	Position	Hrs/FTE	Building	Effective	Reason
Ibarra, Magdalena	Educational Assistant 2	6.5	Letitia Carson Elementary	01/11/2023	Resignation
Wiles, Kent	Project Crew	8.00	Facilities & Maintenance	01/20/2023	Resignation
Lopez-Hernandez, Nicole	Student and Family Advocate 1	7.00	Garfield Elementary School	02/01/2023	Resignation
Fagersten, Shar	Registrar 2	8.00	Corvallis High School	02/07/2023	Resignation

B. December 2022 Financial Statement (Unaudited)



Corvallis

SCHOOL DISTRICT

Prepared for: Corvallis School Board
Prepared by: Olivia Meyers Buch, Finance and Operations Director
Meeting Date: February 9, 2023

December Financial Statements (Unaudited)

NO ACTION REQUIRED

Background

The Statement of Resources and Requirements for the General Fund for the period ending December 30, 2021 and December 30, 2022 follow this report. Please note that the supplemental budget adopted by the board on January 19, 2023 will be reflected in the January financial statements next month.

Year-to-date operating revenues through the end of December 2022 total \$66.3 million or 75.7% of total budgeted operating revenues as compared to \$61.7 million or 75.0% through the end of December 2021. As usual, revenues from the state school fund and property taxes constitute the majority of funds received at this point in the year. Total resources of \$101.8 million are projected to be \$0.4 million less than budgeted.

Year-to-date operating expenditures through the end of December 2022 total \$34.1 million or 37.4% of total budgeted operating expenditures as compared to \$32.0 million or 36.9% through the end of December 2021. Projected underspending in 2022-23 is expected to be approximately 2.0% of the adopted budget.

Projected resources and requirements through December 30, 2022 result in an ending fund balance of \$12.3 million, or 14.0% of projected operating revenues. The projected ending fund balance reflects a decrease in fund balance, or operating deficit, of \$2.0 million; however, all General Fund reserves are projected to be at or above the designations outlined in board policy on June 30, 2023.

Please contact me with questions or if you would like any additional information.

Supplementary Materials

1. Statements of Resources and Requirements as of December 30, 2021 and 2022
2. Schedule of Investments as of December 30, 2022
3. Schedule of Cash Disbursements greater than or equal to \$1,000 for the period of December 1-31, 2022

Corvallis School District 509J
Statement of Resources and Requirements
Fiscal Year to Date as of December 31, 2021 and 2022 Respectively (Unaudited)

General Fund

	FY 2021-22					FY 2022-23				
	Amended	Actuals Thru	% of	Actuals Thru	% of	Adopted	Actuals Thru	% of	Projected Thru	% of
	Budget	12/31/2021	Budget	6/30/2022	Budget	Budget	12/31/2022	Budget	6/30/2023	Budget
RESOURCES										
State School Fund Formula Revenue										
State School Fund - General Support	\$ 37,769,442	22,513,445	59.6%	\$ 38,627,176	102.3%	\$ 40,919,722	\$ 23,780,860	58.1%	\$ 40,144,687	98.1%
Property Taxes Levied by District	31,981,778	30,249,813	94.6%	32,539,634	101.7%	33,366,664	31,230,571	93.6%	33,355,459	100.0%
Other Local Revenues	952,538	86,176	9.0%	1,297,718	136.2%	911,136	1,603	0.2%	1,056,993	116.0%
Local Option Taxes Levied by District	8,351,253	8,029,672	96.1%	8,634,694	103.4%	8,715,618	9,091,808	104.3%	9,760,930	112.0%
State School Fund - Prior Year Adjustment	-	-	-	(69,456)	-	-	-	-	(979,873)	-
Other Revenues	3,239,596	808,043	24.9%	3,389,995	104.6%	3,691,183	2,168,877	58.8%	4,186,049	113.4%
Total Operating Revenues	\$ 82,294,607	\$ 61,687,148	75.0%	\$ 84,419,762	102.6%	\$ 87,604,323	\$ 66,273,719	75.7%	\$ 87,524,245	99.9%
Beginning Fund Balance	\$ 12,941,586	\$ 14,494,452	112.0%	\$ 14,494,452	112.0%	\$ 14,600,814	\$ 14,310,130	98.0%	\$ 14,310,130	98.0%
TOTAL RESOURCES	\$ 95,236,193	\$ 76,181,600	80.0%	\$ 98,914,214	103.9%	\$ 102,205,137	\$ 80,583,848	81.5%	\$ 101,834,375	99.6%
REQUIREMENTS										
Salaries	\$ 42,590,462	\$ 16,018,085	37.6%	\$ 42,775,333	100.4%	\$ 45,178,988	\$ 16,129,629	35.7%	\$ 43,828,145	97.0%
Associated Payroll Costs	25,516,519	8,748,819	34.3%	24,254,496	95.1%	26,569,970	8,946,248	33.7%	25,495,833	96.0%
Purchased Services	13,106,303	4,364,180	33.3%	11,521,104	87.9%	12,680,717	4,612,155	36.4%	12,536,079	98.9%
Supplies and Materials	3,801,952	1,982,527	52.1%	4,194,575	110.3%	4,643,624	2,699,192	58.1%	4,466,726	96.2%
Capital Outlay	100,000	8,510	8.5%	113,535	113.5%	220,000	72,551	33.0%	254,800	115.8%
Other Objects	1,563,382	882,263	56.4%	1,745,041	111.6%	1,789,369	1,612,569	90.1%	1,810,477	101.2%
Total Operating Expenditures	\$ 86,678,618	\$ 32,004,384	36.9%	\$ 84,604,084	97.6%	\$ 91,082,668	\$ 34,072,344	37.4%	\$ 88,392,060	97.0%
Transfers	-	-	-	-	-	90,639	-	-	1,146,627	-
Other Uses of Funds:										
Contingency	2,057,365	-	-	-	-	2,190,108	-	-	-	-
Rainy Day Reserves	4,114,730	-	-	-	-	4,380,216	-	-	-	-
Targeted Reserve (Classified Bargaining)	-	-	-	-	-	500,000	-	-	-	-
Unappropriated Reserves	2,385,480	-	-	-	-	3,961,506	-	-	-	-
TOTAL REQUIREMENTS	\$ 95,236,193	\$ 32,004,384		\$ 84,604,084		\$ 102,205,137	\$ 34,072,344		\$ 89,538,687	
ENDING FUND BALANCE		\$ 44,177,216		\$ 14,310,130			\$ 46,511,505		\$ 12,295,687	
Contingency				2,110,494	2.5% *				2,188,106	2.5% *
Rainy Day Reserves				4,220,988	5.0% *				4,376,212	5.0% *
Unappropriated Reserves				7,978,647	9.5% *				5,731,369	6.5% *
* Percent of Operating Revenue				14,310,130	17.0%				12,295,687	14.0%

Corvallis School District 509J
Schedule of Investments
December 31, 2022

Type of Investment	Investment Date	Maturity/ Call Date	No. of Days	Bond Equivalent Yield	Purchase Price	Par (Maturity) Value
U.S. Treasury Obligations:						
	01/21/22	02/28/23	403	0.498%	\$99.59	3,000,000
	10/15/21	02/28/23	501	0.129%	\$100.00	2,900,000
	01/21/22	03/31/23	434	0.527%	\$99.52	3,000,000
	12/16/21	03/31/23	470	0.289%	\$99.79	2,900,000
	12/02/21	05/15/23	529	0.290%	\$99.76	5,000,000
	06/16/22	06/15/23	364	2.790%	\$97.51	3,000,000
	11/25/22	05/15/24	537	4.500%	\$94.01	5,000,000
US Government-Sponsored Enterprises:						
	09/15/21	01/23/23	495	0.065%	\$100.08	2,900,000
	01/24/22	01/24/23	365	0.500%	\$100.00	4,000,000
	07/13/22	04/20/23	281	2.526%	\$98.37	3,000,000
	09/08/22	08/29/23	355	3.500%	\$99.87	2,000,000
	08/15/22	05/22/23	280	2.881%	\$98.01	2,900,000
	09/15/22	06/26/23	284	3.520%	\$97.50	2,900,000
	11/25/22	06/26/23	213	4.431%	\$97.61	5,000,000
	11/25/22	09/25/23	304	4.610%	\$100.22	5,000,000
	05/06/22	11/06/23	549	2.349%	\$96.92	5,000,000
	11/25/22	12/18/23	388	4.550%	\$100.21	5,000,000
	12/09/22	02/15/24	433	4.320%	\$97.49	5,000,000
	11/25/22	03/08/24	469	4.581%	\$98.35	5,065,000
Total Investments Outside of Local Government Investment Pool:						\$ 72,565,000
Local Government Investment Pool:			Rate			
General Account			3.10%		\$ 24,188,438	
Debt Service Account - GO 2020 Bond Series			3.10%		4,840,436	
Total Investments Inside of Local Government Investment Pool ¹						\$ 29,028,874
Total Investments						\$ 101,593,874

¹ The maximum amount (in any combination of accounts) that the Local Government Investment Pool (LGIP) allows in an account is \$52,713,000.

Compliance with Investment Policy

<u>Type of Investment</u>	<u>Portfolio per Policy</u>	<u>Current Percent</u>
U.S. Treasury Obligations	100.0%	24.4%
U.S. Government Agency Securities and Instrumentalities of Government-Sponsored Corporations	90.0%	47.0%
State of Oregon Local Government Investment Pool (LGIP)	100.0%	28.6%
Bankers Acceptances	25.0%	0.0%
Repurchase Agreements	25.0%	0.0%
Certificates of Deposits	50.0%	0.0%
Commercial Paper	10.0%	0.0%
State of Oregon and Oregon Local Government Securities	25.0%	0.0%
TOTAL		100.00%

Benchmarks as of 12/30/22:

3 Month U.S. Treasury Yield Curve Rate	4.42%
3 Month Jumbo Certificate of Deposit Rate	2.50%

Corvallis School District 509J
 Schedule of Cash Disbursements greater than or equal to \$1,000
 For the period of December 1 to December 31, 2022

Vendor by Fund and Object	Check Total
100 - General Fund	
Charter School Payments	
INAVALE COMMUNITY PARTNERS, INC	79,320.00
Computer Software	
EVERYDAY SPEECH	1,045.97
HELPJUICE, INC.	2,687.20
LOGIK SYSTEMS, INC	15,000.00
ONE DIVERSIFIED LLC	5,197.50
PARENTSQUARE INC	31,074.50
TEACHER SYNERGY LLC	2,775.00
TEXTHELP	1,875.00
Consumable Supplies and Materials	
3 M'S RESTAURANTS LLC	2,200.00
AMAZON CAPITAL SERVICES	21,413.48
APPLE INC	1,890.00
BENCHMARK EDUCATION CO.	1,551.00
BMO HARRIS	5,321.17
CHOWN HARDWARE	1,243.74
DAY WIRELESS SYSTEMS	5,737.11
FRED MEYER CUSTOMER CHARGES	1,851.54
GRAINGER	2,006.36
HOME DEPOT CREDIT SERVICES	3,846.40
INDUSTRIAL WELDING SUPPLY INC	1,192.55
INGRAM LIBRARY SERVICE	5,867.80
KING OFFICE EQUIPMENT INC	1,142.40
MATH LEARNING CENTER	4,353.03
MICK'S GLASS SERVICE INC	2,866.47
MONOPRICE INC	2,154.89
OFFICE DEPOT, INC	7,526.66
PANERA, LLC	1,545.56
PLATT ELECTRIC SUPPLY CO	2,221.04
PROJECT OTY	15,000.00
ROSS RECREATION EQUIPMENT	6,193.00
SCHOOL SPECIALTY LLC	1,543.86
SHIRT CIRCUIT	6,256.20
SWEETWATER SOUND, INC	1,725.95
UMPQUA BANK COMMERCIAL CARD	4,191.32
WAXIE SANITARY SUPPLY	9,114.92
WILBUR-ELLIS	1,303.69
Copier Charges	
CTX - XEROX	8,678.36
Dues and Fees	

Corvallis School District 509J
Schedule of Cash Disbursements greater than or equal to \$1,000
For the period of December 1 to December 31, 2022

Vendor by Fund and Object	Check Total
DEPARTMENT OF ENVIRONMENTAL QUALITY	1,603.96
Electricity	
CONSUMERS POWER INC	28,720.73
PACIFIC POWER	62,984.66
Equipment \$5,000 and greater	
CASCADE RECREATION INC.	24,876.00
Equipment-like items \$1,000 - \$4,999	
STOVER, EVEY AND JACKSON	1,763.00
Fuel	
NW NATURAL	59,815.07
Garbage	
REPUBLIC SERVICES	16,152.51
Instructional, Professional and Technical Service	
CORVALLIS YOUTH SYMPHONY ASSOCIATION	8,500.00
DHS RECEIVING AND TRUST	28,412.76
LINN BENTON COMMUNITY COLLEGE	2,325.36
UMPQUA BANK COMMERCIAL CARD	1,032.00
Intergovernmental Accounts Receivable	
DHS OHA RECEIPTING UNIT	4,743.94
Legal Services	
HUNGERFORD LAW FIRM LLP	1,698.85
THE LAW OFFICE OF BRETT MERSEREAU	1,350.00
Library Books	
INGRAM LIBRARY SERVICE	1,631.67
Other Communication Services	
COMCAST/INSTITUTIONAL NETWORKS	21,075.18
T-MOBILE	6,734.50
Other General Professional and Technological Servi	
LINN BENTON LINCOLN ESD	27,906.98
Other Non-instructional Professional and Technical	
BMO HARRIS	1,693.93
CORVALLIS CLINIC - OCCUPATIONAL MEDICINE	2,464.00
CPR WORKS, LLC	1,710.00
Hawkins, Christine M	1,017.00
HEALTHY BUSINESS SYSTEMS ASSOCIATES LLC	24,000.00
MAXIM STAFFING SOLUTIONS	3,649.50
PBS ENGINEERING & ENVIRONMENTAL INC	2,205.42
SOLIANT	8,700.00
Other Professional Services - Certified Subs	
EDUSTAFF	216,006.41
Other Professional Services - Classified Subs	
EDUSTAFF	66,969.78

Corvallis School District 509J
Schedule of Cash Disbursements greater than or equal to \$1,000
For the period of December 1 to December 31, 2022

Vendor by Fund and Object	Check Total
Postage	
GARTEN SERVICES, INC	1,035.07
Redemption of Principal	
US BANK EQUIPMENT FINANCE	4,268.77
Reimbursable Student Transportation	
DIAL-A-BUS OF BENTON COUNTY	98,270.71
MID COLUMBIA BUS CO INC	20,647.10
Rentals	
UMPQUA BANK COMMERCIAL CARD	1,423.00
Repairs and Maintenance Services	
ADVANCED WOODCRAFT	10,410.00
BENTON COUNTY PUBLIC WORKS	11,556.46
BOILER & COMBUSTION SERVICE INC	13,464.54
CHOWN HARDWARE	1,750.00
COOLSYS COMMERCIAL & INDUSTRIAL SOLUTION	1,738.38
EC ELECTRIC	5,868.48
HR MECHANICAL SERVICES	2,386.51
KONE INC	4,056.44
LINDSTROM CONSTRUCTION LLC	9,986.00
MICK'S GLASS SERVICE INC	1,430.96
PEAK TREE CARE	3,600.00
REED'S PAINTING, INC	1,890.00
SYNERGY SECURITY SOLUTIONS	5,519.00
Technology Taggable Equip <\$5,000	
APPLE INC	4,912.00
Telephone	
AMPLIFIED IT LLC	2,799.46
AT&T MOBILITY-ACCT#837370420 (TECH)	2,787.73
CENTURYLINK	4,221.61
Textbooks	
BOUND TO STAY BOUND BOOKS	1,314.52
ROCKALINGUA	1,194.00
Travel, Out of District	
BMO HARRIS	10,877.75
UMPQUA BANK COMMERCIAL CARD	4,186.45
Tuition Payments to Private Schools	
KARTINI SCHOOL	3,455.92
Water and Sewage	
CITY OF CORVALLIS	44,463.16
100 - General Fund Total	1,178,170.90
204 - District Donation Fund	
Consumable Supplies and Materials	

Corvallis School District 509J
Schedule of Cash Disbursements greater than or equal to \$1,000
For the period of December 1 to December 31, 2022

Vendor by Fund and Object	Check Total
AMAZON CAPITAL SERVICES	6,415.41
BMO HARRIS	1,707.90
FRED MEYER CUSTOMER CHARGES	2,644.05
NO DINX INC	1,055.28
PACIFIC POWER	1,206.95
SWEETWATER SOUND, INC	2,571.96
WOODWIND AND BRASSWIND	6,436.00
Other Professional Services - Certified Subs	
EDUSTAFF	1,246.25
Travel, Out of District	
UMPQUA BANK COMMERCIAL CARD	3,087.83
204 - District Donation Fund Total	26,371.63
205 - District Athletics Fund	
Non-reimbursable Student Transportation	
BENTON COUNTY PUBLIC WORKS	1,000.90
Other Non-instructional Professional and Technical	
BROOKS, DAVE	1,029.00
MVBOA	24,765.54
Other Professional Services - Certified Subs	
EDUSTAFF	2,741.69
Other Professional Services - Classified Subs	
EDUSTAFF	1,336.61
Repairs and Maintenance Services	
BENTON COUNTY PUBLIC WORKS	1,396.68
205 - District Athletics Fund Total	32,270.42
205- District Athletics Fund	
Buildings Acquisition	
MODERN BUILDING SYSTEMS	3,972.52
Cleaning Services	
CINTAS	8,639.19
Consumable Supplies and Materials	
BMO HARRIS	9,728.14
Dues and Fees	
OREGON SCHOOL ACTIVITIES ASSOCIATION	1,196.00
Equipment-like items \$1,000 - \$4,999	
B & H ELECTRONICS/PHOTO/VIDEO	2,558.00
Non-reimbursable Student Transportation	
STA WEST REGION	3,624.22
Other Non-instructional Professional and Technical	
BOYS & GIRLS CLUB OF CORVALLIS	36,589.76
Other Professional Services - Certified Subs	
EDUSTAFF	13,710.63

Corvallis School District 509J
 Schedule of Cash Disbursements greater than or equal to \$1,000
 For the period of December 1 to December 31, 2022

Vendor by Fund and Object	Check Total
Travel, Out of District	
BMO HARRIS	1,016.60
205- District Athletics Fund Total	81,035.06
296 - Grants Fund	
Charter School Payments	
INAVALE COMMUNITY PARTNERS, INC	10,502.73
Consumable Supplies and Materials	
AMAZON CAPITAL SERVICES	2,036.77
STOVER, EVEY AND JACKSON	2,206.00
Equipment-like items \$1,000 - \$4,999	
MICROSOFT STORE	3,150.00
Other Non-instructional Professional and Technical	
YOUR MONEY LINE	35,424.00
Textbooks	
MPS	3,171.20
Travel, Out of District	
UMPQUA BANK COMMERCIAL CARD	7,003.44
296 - Grants Fund Total	63,494.14
297 - Student Body Funds	
Consumable Supplies and Materials	
AMAZON CAPITAL SERVICES	1,448.23
BMO HARRIS	1,452.00
BSN SPORTS LLC	8,256.85
CORVALLIS CUSTOM	3,450.50
ELEMENT GRAPHICS, INC	2,285.84
HERFF JONES - YEARBOOKS	2,746.50
M & R SALES	12,592.00
SHIRT CIRCUIT	2,290.00
UMPQUA BANK COMMERCIAL CARD	5,312.27
VARSITY FASHIONS	15,314.45
WILLAMETTE VALLEY PIE COMPANY	1,040.00
Library Books	
SCHOLASTIC INC.	2,344.28
Other Non-instructional Professional and Technical	
MVBOA	4,092.00
Travel, Student Out of District	
FIRST WASHINGTON	9,250.00
297 - Student Body Funds Total	71,874.92
298 - Designated Revenue Fund	
Buildings Acquisition	
FORTIS CONSTRUCTION	3,662.75
Construction Contracts Payable-Retained Percentage	

Corvallis School District 509J
Schedule of Cash Disbursements greater than or equal to \$1,000
For the period of December 1 to December 31, 2022

Vendor by Fund and Object	Check Total
FORTIS CONSTRUCTION	30,328.92
Consumable Supplies and Materials	
AMAZON CAPITAL SERVICES	1,371.23
UMPQUA BANK COMMERCIAL CARD	1,059.06
WAXIE SANITARY SUPPLY	4,550.25
Equipment-like items \$1,000 - \$4,999	
PINE HILL TRAILERS	2,300.00
Miscellaneous	
MICHELLE SULLIVAN PHOTOGRAPHY	4,345.00
298 - Designated Revenue Fund	Total
	47,617.21
299 - Food Service Fund	
Consumable Supplies and Materials	
US FOODS INC	19,703.34
Food - Food Service Only	
FRANZ FAMILY BAKERIES	4,214.33
LOCHMEAD DAIRY	16,960.29
RIVERWOOD ORCHARD AND FARM	2,337.50
Inventories	
UNITED SALAD CO	12,078.70
US FOODS INC	104,011.68
Other Professional Services - Classified Subs	
EDUSTAFF	1,111.58
Repairs and Maintenance Services	
ADVANCED ENVIRONMENTAL SYSTEMS	1,030.00
BENTON COUNTY PUBLIC WORKS	1,518.39
COOLSYS COMMERCIAL & INDUSTRIAL SOLUTION	8,850.88
299 - Food Service Fund	Total
	171,816.69
400 - Capital Projects Fund	
Architect/Engineer Services	
DLR GROUP	80,462.60
FOUNDATION ENGINEERING	1,425.50
PBS ENGINEERING & ENVIRONMENTAL INC	19,276.83
PIVOT ARCHITECTURE	45,923.25
Buildings Acquisition	
BROWN & BROWN	51,160.00
BUCKS SANITARY SERVICE	9,096.71
CITY OF CORVALLIS - DEVELOPMENT SERVICES	2,920.15
CLAIR COMPANY INC	15,092.85
CONVERGINT TECHNOLOGIES	25,782.42
DELTA CONNECTS	2,821.50
DRY BOX INC	1,530.00
ELEVATE BUILDING COMMISSIONING LLC	5,875.00

Corvallis School District 509J
Schedule of Cash Disbursements greater than or equal to \$1,000
For the period of December 1 to December 31, 2022

Vendor by Fund and Object	Check Total
FORTIS CONSTRUCTION	3,835,163.04
GLUMAC	5,263.00
KCDA PURCHASING COOPERATIVE	75,971.00
LLAMA MOVERS LLC	6,102.00
PACE	4,268.00
SYNERGY SECURITY SOLUTIONS	3,077.08
WENAHA GROUP INC	108,359.54
WILBUR-ELLIS	4,221.89
Construction Contracts Payable-Retained Percentage	
FORTIS CONSTRUCTION	888,623.14
Consumable Supplies and Materials	
MINUTEMAN PRESS CORVALLIS	1,036.40
Rentals	
BRIAN LIND & DANIEL & ANDREA LIND TRUST	4,295.33
400 - Capital Projects Fund Total	5,197,747.23
601 - Insurance Fund	
Group Insurance	
BMO HARRIS	2,500.58
WILLAMETTE DENTAL GROUP (GROUP Z1329)	32,128.45
601 - Insurance Fund	Total
	34,629.03
Grand Total	6,905,027.23

C. Board Policies -- **FOR INFORMATION**

1. Policy IGDJ - Interscholastic Activities - First Read



Corvallis

SCHOOL DISTRICT

Prepared for: Corvallis School Board
Prepared by: Melissa Harder & Kristin Mahoney
Meeting Date: February 9, 2023

NO ACTION REQUIRED

Board Policy IGDJ—Interscholastic Activities—Revised—First Reading

Background

Senate Bill 1522 (2022) modified the use of the term general education development or GED to be referred to as “high school equivalency program” which was further defined to mean: a program provided to assist a student in earning a certificate for passing an approved high school equivalency test such as the General Educational Development (GED) Test.

Policy IGDJ has been redesignated as required. The policy has also been rewritten to comply with OAR 581-022-2308(2), a new Division 22 rule requiring school districts to adopt policy with conditions of membership when entering into an agreement with a voluntary organization for interscholastic activities. The Division 22 rule requires interscholastic organizations adhere to equity focused policies that address the use of derogatory language at activities, prohibit discrimination, permit a student to wear religious clothing, balance health and safety and reasonable accommodation needs of participants, and maintains a transparent complaint process.

Involvement

Staff members: Melissa Harder & Kristin Mahoney

Cost Impact

None.

Function

Review of revisions.



Code: IGDJ

Adopted: 10/19/89

Revised/Readopted: 5/10/99; 6/25/07; 1/10/11;
2/07/19; 2/03/22

Interscholastic Activities

The Board recognizes the integral role interscholastic activities¹ play in the character development and general enhancement of the education of its students. Accordingly, administrators, coaches, advisors, student participants and others associated with the district's high school activities programs and events² shall conduct themselves in a manner that is consistent with the letter and spirit of policies, rules and regulations of the district and of the Oregon School Activities Association (OSAA) and the fundamental values of sportsmanship any associated voluntary organization³. Each will be held accountable for its actions.

The district and its schools may only be members of and pay fees, if any, to a voluntary organization that administers interscholastic activities or that facilitates the scheduling and programming of interscholastic activities if the organization:

1. Implements and adheres to equity focused policies that:
 - a. Address the use of derogatory or inappropriate names, insults, verbal assaults, profanity, or ridicule that occurs at an interscholastic activity, including by spectators of the interscholastic activity;
 - b. Prohibit discrimination;
 - c. Permit a student to wear religious clothing in accordance with the student's sincerely held religious belief and consistent with any safety and health requirements; and
 - d. Balance the health, safety, and reasonable accommodation needs of participants on an activity-by-activity basis;
2. Maintains a transparent complaint process that:
 - a. Has a reporting system to allow participants of interscholastic activities or members of the public to make complaints about student, coach, or spectator behavior;

¹ Interscholastic activities includes: for students any grade from kindergarten through grade 12, athletics, music, speech and other similar or related activities; for students in any grade from kindergarten through grade eight, activities that are offered only before or after regular school hours and that may, but are not required to, involve interaction among other schools.

² This applies to only OSAA sanctioned activities and events.

³ Includes a voluntary organization that administers interscholastic activities or that facilitates the scheduling and programming of interscholastic activities.

- b. Responds to a complaint made within 48 hours of the complaint being received; and
 - c. Resolves a complaint within 30 days of the complaint being received unless the organization determines that there is good cause to extend the timeline for resolving the complaint;
3. Develops and implements a system of sanctions against schools, students, coaches, and spectators if a complaint is verified; and
 4. Performs an annual survey of students and their parents to understand and respond to potential violations of equity focused policies or other discrimination.

The district shall allow homeschooled students that reside in the district, students eligible to attend school and enrolled in a ~~district or ESD provided General Education Development (GED)~~ high school equivalency program⁴ that reside in the district, and students attending a public charter school that does not provide interscholastic activities that reside in the district, the opportunity to participate in available interscholastic activities in compliance with state law.

The district will provide interscholastic activities for students in compliance with Title IX.

District employees and activity volunteers are prohibited from making contact or otherwise causing contact to be made with a student for purposes of suggesting or encouraging the student and/or family to maintain or change residency for activities eligibility or participation. The principal, activities director, advisors, and coaches are each responsible for ensuring student participants meet all district and OSAA eligibility requirements of participation and those of the associated voluntary organization. The principal is responsible for ensuring accurate certification regarding the eligibility of participating students and for verifying that coaches have been certified through the National Federation of High School Coaches Certification program prior to assuming coaching duties. The principal shall ensure that a program is in place to effectively evaluate the performance of all coaches and activities advisers under their supervision.

Volunteers may be approved to assist with district activities with prior approval from the principal and the completion of a Volunteer Application form and criminal background check.

The principal shall investigate all allegations of district student ineligibility, staff recruitment violations, or other student or staff conduct that may violate Board policies, administrative regulations, and/or OSAA the rules and regulations of the associated voluntary organization. The principal shall notify the superintendent of conduct that violates the terms of this policy and report to the OSAA associated voluntary organization as required.

An employee determined to have violated Board policies and/or rules and regulations of the OSAA associated voluntary organization may be subject to discipline, up to and including, dismissal from their interscholastic duties and termination from district employment.

A student in violation of Board policies and/or the OSAA rules and regulations of the associated

⁴ “High school equivalency program” means a program provided to assist a student in earning a certificate for passing an approved high school equivalency test such as the General Educational Development (GED) test.

voluntary organization will be subject to discipline, up to and including, dismissal from their interscholastic activity or program, suspension, and/or expulsion from school.

Volunteers in violation of Board policies and/or the rules and regulations of the associated voluntary organization shall be subject to discipline, up to and including, removal from district programs and activities and such other sanctions as may be deemed appropriate by the district.

Employees, volunteers, or students in violation of OSAA such policies, rules and/or regulations may be required to remunerate the district in the event fines are assessed by OSAA as a result of their actions.

The superintendent will develop procedures, as necessary, to implement this policy, including a process to ensure that all district rules governing the conduct of students, staff, and volunteers engaged in district activities are regularly reviewed and updated.

After School Sports

After school sports, intramurals, and interscholastic athletics may be provided at appropriate levels.

Athletic Insurance

The district will require all students who participate in interscholastic athletics to be covered by accident insurance. If a student is covered by any plan other than that made available through the district, the student must provide proof of the coverage to the school.

Gym Attire

The district does not require that a specific style of uniform be worn by students in physical education classes, but does require attire which meets standards of safety, freedom of action, and proper decorum.

Medical Examinations

1. Students in grades 7 through 12 are to have physical examinations performed prior to participation in extracurricular sports. "Participation," as used in this policy means participation in sports practices and interscholastic sports competition. The physical examination must be conducted by a physician possessing an unrestricted license to practice medicine, a licensed naturopathic physician, a licensed physician assistant, a certified nurse practitioner or a licensed chiropractic physician who has clinical training and experience in detecting cardiopulmonary diseases and defects. In addition, the examination form used should be the most recent form as designated by OSAA.
2. Students who continue to participate in extracurricular sports in grades 7 through 12 shall be required to complete a physical examination once every two years, thereafter.
3. Students are required to submit to the district a School Sports Preparticipation Examination form prior to their participation with proof of insurance provided. The form is to be completed

and signed by a parent and physician, giving clearance and permission for the student to participate and authorizing emergency medical treatment and/or transportation to a medical facility, as necessary.

4. If a student has a major illness, injury or surgery which takes them out of an athletic program, that student must have a medical exam or the physician's written approval in order to return to participation in the program.

Interscholastic Activities – IGDJ 2-3

5. Annual consultation with a physician is required when a student has a significant disease process or illness.
6. All new students entering grades 7 through 12 will obtain a medical examination prior to competition.

END OF POLICY

Legal Reference(s):

[ORS 326.051](#)
[ORS 332.075\(1\)\(c\)](#)
[ORS 332.107](#)
[ORS 339.450 - 339.460](#)

[OAR 581-015-2255](#)
[OAR 581-021-0045 – 0049](#)
[OAR 581-022-2308\(2\)](#)
[OAR 581-026-0005](#)

[OAR 581-026-0700](#)
[OAR 581-026-0705](#)
[OAR 581-026-0710](#)

Title IX of the Education Amendments of 1972, 20 U.S.C. §§ 1681-1683 (2018); Nondiscrimination on the Basis of Sex in Education Programs or Activities Receiving Federal Financial Assistance, 34 C.F.R. Part 106 (2022).
OREGON SCHOOL ACTIVITIES ASSOCIATION, OSAA HANDBOOK.
Montgomery v. Bd. of Educ., 188 Or. App. 63 (2003).
Senate Bill 1522 (2022).

Cross Reference(s):

JHCA/JHCB - Immunization, Physical Examination, Vision Screening/Eye Examination and Dental Screening

Interscholastic Activities - IGDJ 3-3

2. Policy IKF - High School Graduation Requirements - First Read



Corvallis

SCHOOL DISTRICT

Prepared for: Corvallis School Board
Prepared by: Melissa Harder & Kristin Mahoney
Meeting Date: February 9, 2023

NO ACTION REQUIRED

Board Policy IKF—Graduation Requirements—Revised—First Reading

Background

Revision of this policy is required as a result of Senate Bill 1522 (2022). The bill provided a new definition for “an educational program in this state” and modified what credits the district shall accept from other educational programs in this state to satisfy credit requirements for a student to graduate.

An additional change modified the definition of “world language” in graduation requirements to include sign language, heritage language, and languages other than a student’s primary language.

Involvement

Staff members: Melissa Harder & Kristin Mahoney

Cost Impact

None.

Function

Review of revisions.



Corvallis

SCHOOL DISTRICT

Code: IKF
Adopted: 1/10/11
Readopted: 8/19/13; 12/05/16; 6/20/19, 1/9/20, 2/3/22

High School Graduation Requirements**

The Board establishes graduation requirements for awarding of a high school diploma, a modified diploma, an extended diploma, and an alternative certificate which meet or exceed state requirements. A student may satisfy graduation requirements in less than four years. The district will award a diploma to a student fulfilling graduation requirements in less than four years if consent is given by the student's parent or guardian or by the student who is 18 years of age or older or emancipated.

If the district requires diploma requirements beyond the state requirements, the district shall grant a waiver for those requirements to any student who, at any time from grade 9 to 12 was:

1. A foster child¹;
2. Homeless;
3. A runaway;
4. A child in a military family covered by the Interstate Compact on Educational Opportunity for Military Children;
5. A child of a migrant worker; or
6. Enrolled in the Youth Corrections Education Program or the Juvenile Detention Education Program.

For any student identified above, the district shall accept any credits earned by the student in ~~another district or public charter school~~ an educational program² in this state, applying those credits toward the state requirements for a diploma if the credits satisfied those requirements in that ~~district or public charter school~~ educational program in this state.

¹ As defined in ORS 30.297.

² "Educational program in this state" means an educational program that is provided by a school district, a public charter school, the Youth Corrections Education Program or the Juvenile Detention Program, or funded as provided by ORS 343.243 for students in a long term care or treatment facility described in ORS 343.962 or a hospital identified in ORS 343.261.

Diploma

A high school diploma will be awarded to students in grades 9 through 12 who complete a minimum of 24 credits which include at least:

1. Three credits of mathematics (shall include one unit at the Algebra I level and two units that are at a level higher than Algebra I);
2. Four credits in language arts (shall include the equivalent of one unit in written composition);
3. Three credits of science;
4. Three credits of social sciences (including history, civics³, geography and economics (including personal finance));
5. One credit in health education;
6. One credit in physical education; and
7. Three credits in career and technical education, the arts, or world languages⁴ (units shall be earned in any one or a combination).

The district shall offer students credit options provided the method for obtaining such credits is described in the student's personal education plan and the credit is earned by meeting requirements described in Oregon Administrative Rule (OAR) 581-022-2025.

To receive a diploma, in addition to credit requirements, outlined in OAR 581-022-2000, a student must⁵:

1. Develop an education plan and build an education profile;
2. Demonstrate extended application through a collection of evidence; and
4. Participate in career-related learning experiences.

Modified Diploma

A modified diploma will be awarded only to students who have demonstrated the inability to meet the full set of academic standards adopted by the State Board of Education for a diploma while receiving reasonable modifications and accommodations. A modified diploma may only be awarded to a student who meets the eligibility criteria below and other criteria, if applicable, outlined in OAR 581-022-2010(3):

³ Civics becomes a half-credit requirement beginning on January 1, 2026 (Senate Bill 513, 2021)

⁴ "World language" includes sign language, heritage language and languages other than a student's primary language.

⁵ The proficiency in Essential Skills requirement has been waived and is not a condition of receiving a high school diploma during the 2021-2022, 2022-2023 or 2023-2024 school year (Senate Bill 744, 2021).

1. Has a documented history of an inability to maintain grade level achievement due to significant learning and instructional barriers; or
2. Has a documented history of a medical condition that creates a barrier to achievement.

Having met the above eligibility criteria, a modified diploma will be awarded to students, who while in grade nine through completion of high school, complete 24 credits which shall include:

1. Three credits in language arts;
2. Two credits in mathematics;
3. Two credits in science;
4. Two credits in social sciences (which may include history, civics, geography and economics (including personal finance));
5. One credit in health education;
6. One credit in physical education; and
7. One credit in career technical education, the arts, or world languages (units may be earned in any one or a combination).

Students may earn additional credits to earn a modified diploma pursuant to OAR 581-022-2010.

In addition to credit requirements as outlined in OAR 581-022-2010, a student must:

1. Develop an education plan and build an education profile; and
2. Demonstrate extended application through a collection of evidence.

Districts may make modifications to the assessment for students who seek a modified diploma when the following conditions are met:

1. For a student on an individualized education program (IEP) or Section 504 plan, any modifications to work samples must be consistent with the requirements established in the IEP or 504 plan. Modifications include practices and procedures that compromise the intent of the assessment through a change in learning expectations, construct, or content that is to be measured, grade level standard, or measured outcome of the assessment. This means that IEP or 504 school teams responsible for approving modifications for a student's assessment may adjust the administration of the assessment and/or the assessment's achievement standard;
2. For a student not on an IEP or 504 plan, any modifications to work samples must have been provided to the student during their instruction in the content area to be assessed and in the year in which the student is being assessed, and modifications must be approved by the school team that is responsible for monitoring the student's progress toward the modified diploma.

Students not on an IEP or a Section 504 Plan may not receive a modified Smarter Balanced assessment.

A student's school team shall decide that a student should work toward a modified diploma no earlier than the end of grade six and no later than two years before the student's anticipated exit from high school. A student's school team may decide to revise a modified diploma decision.

A student's school team may decide that a student who was not previously working towards a modified diploma should work toward one when the student is less than two years from anticipated exit from high school if the documented history has changed.

Beginning in grade five or beginning after a documented history to qualify for a modified diploma, the district shall annually provide to the parents or guardians of the student, information about the availability and requirements of a modified diploma.

Extended Diploma

An extended diploma will be awarded only to students who have demonstrated the inability to meet the full set of academic content standards adopted by the State Board of Education for a diploma while receiving modifications and accommodations. To be eligible for an extended diploma, a student must:

1. While in grade nine through completion of high school, complete 12 credits, which may not include more than six credits in a self-contained special education classroom and will include:
 - a. Two credits of mathematics;
 - b. Two credits of language arts;
 - c. Two credits of science;
 - d. Three credits of history, geography, economics, or civics;
 - e. One credit of health;
 - f. One credit of physical education; and
 - g. One credit of the arts, or a world language.
2. Have a documented history of:
 - a. An inability to maintain grade level achievement due to significant learning and instructional barriers;
 - b. A medical condition that creates a barrier to achievement; or
 - c. A change in the student's ability to participate in grade level activities as a result of a serious illness or injury that occurred after grade eight.

Beginning in grade five or beginning after a documented history to qualify for a modified diploma, the district shall annually provide to the parents or guardians of the student, information about the availability and requirements of an extended diploma.

Alternative Certificates

Alternative certificates will be awarded to students who do not satisfy the requirements for a diploma, modified diploma, or extended diploma if the students meet minimum requirements established by the district.

Beginning in grade five or beginning after a documented history to qualify for a modified diploma, the district shall annually provide to the parents or guardians of the student, information about the availability and requirements of an alternative certificate.

Other District Responsibilities

The district will ensure that students have onsite access to the appropriate resources to achieve a diploma, modified diploma, extended diploma, or alternative certificate at each high school. The district will provide age-appropriate and developmentally appropriate literacy instruction to all students until graduation.

The district may not deny a student the opportunity to pursue a diploma with more stringent requirements than a modified diploma or an extended diploma for the sole reason the student has the documented history listed under the above modified diploma or extended diploma requirements.

The district may award a modified diploma or extended diploma to a student only upon the written consent of a student who is emancipated or who has reached the age of 18 at the time the modified or extended diploma is awarded, or the student's parent or guardian. The district shall receive the written consent during the school year in which the modified diploma or extended diploma is awarded.

A student shall have the opportunity to satisfy the requirements for a modified diploma, extended diploma, or alternative certificate after four years starting in the ninth grade, or until the student reaches the age of 21, if the student is entitled to a public education until the age of 21 under state or federal law.

A student may satisfy the requirements for a modified diploma, extended diploma, or alternative certificate in less than four years but not less than three years. To satisfy the requirements for a modified diploma, extended diploma, or alternative certificate in less than four years, the student's parent or guardian or a student who is emancipated or has reached the age of 18 must provide written consent that clearly states that the parent, guardian, or student is waiving the fourth year and/or years until the student reaches the age of 21. A copy of the consent will be forwarded to the district superintendent who will annually report to the Superintendent of Public Instruction the number of such consents.

A student who qualifies to receive or receives a modified diploma, extended diploma, or alternative certificate shall have the option of participating in a high school graduation ceremony with the student's class.

A student who receives a modified diploma, an extended diploma, or an alternative certificate shall have access to instructional hours, hours of transition services, and hours of other services that are designed to meet the unique needs of the student and when added together provide a total number of hours of instruction and services that equals at least the total number of instructional hours that is are required to be provided to students who are attending a public high school.

The district will award to students with disabilities a document certifying successful completion of program requirements. No document issued to students with disabilities educated in full or in part in a special education program shall indicate that the document is issued by such a program. When a student who has an IEP completes high school, the district will give the student an individualized summary of performance.

Eligible students with disabilities are entitled to a Free Appropriate Public Education (FAPE) until the age of 21, even if they have earned a modified diploma, an extended diploma, an alternative certificate, or completion of a General Educational Development document. The continuance of services for students with disabilities for a modified diploma, extended diploma, or alternative certificate is contingent on the IEP team determining the student’s continued eligibility and special education services are needed.

Students and their parents will be notified of graduation and diploma requirements.

The district may not deny a diploma to a student who has opted out of statewide assessments if the student is able to satisfy all other requirements for the diploma. Students may opt out of the Smarter Balanced or alternate Oregon Extended Assessment by completing the Oregon Department of Education’s Opt-out Form⁶ and submitting the form to the district.

The district will issue a high school diploma, pursuant to Oregon law (ORS 332.114) to a veteran if the veteran resides within the boundaries of the district or is an Oregon resident and attended a high school of the district, or to a deceased veteran, upon request from a representative of the veteran, if the deceased veteran resided within the boundaries of the district at the time of death or was an Oregon resident at the time of death and attended a high school of the district.

The act of student-initiated test impropriety is prohibited. A student that participates in an act of student-initiated test impropriety will be subject to discipline. “Student-initiated test impropriety” means student conduct that is inconsistent with the *Test Administration Manual* or accompanying guidance; or results in a score that is invalid.

END OF POLICY

Legal Reference(s):

[ORS 329.007](#)

[ORS 329.045](#)

[ORS 329.451](#)

[ORS 329.479](#)

[ORS 332.107](#)

[ORS 332.114](#)

[ORS 336.585](#)

[ORS 336.590](#)

[ORS 339.115](#)

[ORS 339.505](#)

[ORS 343.295](#)

[OAR 581-021-0009](#)

[OAR 581-022-0102](#)

[OAR 581-022-2000](#)

[OAR 581-022-2005](#)

[OAR 581-022-2010](#)

[OAR 581-022-2015](#)

[OAR 581-022-2020](#)

[OAR 581-022-2025](#)

[OAR 581-022-2030](#)

[OAR 581-022-2115](#)

[OAR 581-022-2120](#)

[OAR 581-022-2505](#)

Test Administration Manual, published by the OREGON DEPARTMENT OF EDUCATION.

~~House Bill 2056 (2021)~~

~~Senate Bill 744 (2021)~~

Senate Bill 1522 (2022).

⁶ Department of Education page for: [30-day notice and opt-out form](#)

XIV. BOARD MEMBER COMMENTS (9:05 p.m.)*

XV. ADJOURNMENT (9:25 p.m.)*

*All times are approximate.

Note: The Chair of the Board may alter the order of business as they deem proper and necessary.

Agendas – Agendas and supporting materials are available online at <https://v3.boardbook.org/Public/PublicHome.aspx?ak=1000829> a few days before each School Board meeting. For more information, please contact Julie Catala at kimberly.nelson@corvallis.k12.or.us.

Communication With The School Board – Communication with the Board can be made by telephone, letter, e-mail and public testimony. Letters may be addressed to individual Board members or the Board as a whole and sent to 1555 SW 35th Street, Corvallis, OR 97333. E-mail may be sent to schoolboard@corvallis.k12.or.us and will be sent to all board members simultaneously as well as to key District Office staff. For more information, please contact Kim Nelson at kimberly.nelson@corvallis.k12.or.us.

Consolidated Action Agenda – The purpose of the consolidated action agenda is to expedite action on routine agenda items. All agenda items that are not held for discussion at the request of a Board member or staff member will be approved/accepted as written as part of the consolidated motion. Items designated or held for discussion will be acted upon individually.

Public Comment –

Guidelines are at: <https://www.csd509j.net/about-us/school-board/provide-input-and-be-informed/>

Executive Session – Permissible purposes of Executive Sessions include: ORS 192.660(2)(a) – Employment of Public Officers, Employees and Agents; ORS 192.660(2)(b) – Discipline of Public Officers and Employees; ORS 192.660(2)(d) – Labor Negotiator Consultations; ORS 192.660(2)(e) – Real Property Transactions; ORS 192.660(2)(f) – Exempt Public Records; ORS 192.660(2)(h) – Legal Counsel; ORS 192.660(2)(i) – Performance Evaluations of Public Officers and Employees; ORS 192.660(2)(j) – Public Investments.

SCHOOL BOARD MEMBERS			
Vincent Adams	541-738-4324	Terese Jones	541-230-1673
Sami Al-Abdrabbuh	541-283-6611	Shauna Tominey, Co-Vice Chair	541-829-8411
Tina Baker	541-223-1997	Luhui Whitebear, Co-Vice Chair	541-632-3568
Sarah Finger McDonald, Chair	541-908-3756		

EXECUTIVE STAFF MEMBERS	
Ryan Noss, Superintendent	541-757-5841
Melissa Harder, Assistant Superintendent	541-766-4857
Olivia Meyers Buch, Finance and Operations Director	541-757-5874
Jennifer Duvall, Human Resources Director	541-757-5840
Kim Nelson, Executive Assistant to the Superintendent; Board Secretary	541-757-5841