



 AGENDA

I. CALL MEETING TO ORDER	6:30 - 6:50 p.m.	
Becky Tymchuk		
A. Pledge to Flag		
B. Board Procedures		
Becky Tymchuk		
C. Recognition of Students, Staff and Community		3
Board Members		
II. BEA/OSEA COMMENTS	6:50 - 6:55 p.m.	
III. PUBLIC PARTICIPATION	6:55 - 7:40 p.m.	
Public Comments		
IV. REPORTS	7:30 - 8:15 p.m.	
A. Superintendent Comments		
Don Grotting		
B. School Board Presentations		
a. Montclair Elementary School		5
Sean Leverty		
b. West TV Elementary School		10
Scarlet Valentine		
C. Financial Update		13
Mike Schofield		
D. Division 22 Compliance/Assurances		23
Jon Bridges		
E. Student Success Act HB3427		
Maureen Wheeler, Ginny Hansmann & David Williams		
V. BREAK	8:15 - 8:25 p.m.	
VI. DISCUSSION ITEMS	8:25 - 8:45 p.m.	
Becky Tymchuk, Camellia Osterink, David Williams		
A. First Reading of Policy DBDB - Financial Reserves		29
Becky Tymchuk, Anne Bryan and Donna Tyner		
B. First Reading of Policy DFA - Investment of Funds		31
Mike Schofield		
C. First Reading of I Policy AR's		40
a. IGBA-AR - Students with Disabilities - Child Identification Procedures		41
b. IGBAE-AR - Special Education - Participation in Regular Education Programs**		45
c. IGBAF-AR - Special Education - Individualized Education Program (IEP)**		47
d. IGBAH-AR - Special Education - Procedural Safeguards**		63
e. IGBAI-AR - Special Education - Evaluation Eligibility Procedures**		75
f. IGBAJ-AR - Special Education - Private Schools		86
g. IGBAK-AR - Special Education - Free Appropriate Public Education (FAPE)		102
h. IGBAL-AR - Special Education - Services for Home-Schooled Students with Disabilities**		
VII. ACTION ITEMS	8:45 - 8:50 p.m.	
A. Consent Agenda		

a. Personnel		
b. Approval of School Board Meeting Minutes		113
c. Grant Report		121
d. Public Contracts		122
VIII. BOARD COMMUNICATION	8:50 - 9:00 p.m.	
Board Members		
A. Individual School Board Member Comments		
IX. CLOSING COMMENTS/ADJOURN	9:00 - 9:05 p.m.	
Becky Tymchuk & Don Grotting		
X. PUBLIC COMMENTS, Continued		
XI. INFORMATION ITEMS		
A. Bond Program Status Report		125



WE INNOVATE



WE EMBRACE EQUITY



WE COLLABORATE



RECOGNITION OF STUDENTS, STAFF AND COMMUNITY

POLICY ISSUE/SITUATION

Tonight, the District recognizes the following individuals for their outstanding achievement and contribution to the Beaverton School District and the community. The following recognition exemplifies the Pillar of Collaboration.

BACKGROUND INFORMATION:

WE Expect Excellence: School Board Recognition Month - Becky Tymchuk, Eric Simpson, Anne Bryan, Tom Colett, Susan Greenberg, LeeAnn Larsen, and Donna Tyner

The Beaverton School District is joining the other 196 school districts throughout Oregon in celebrating "School Board Recognition Month" during January. In the Beaverton School District, we are very fortunate to have seven volunteer school board members who are committed to helping *every* student reach their full potential; Chair, Becky Tymchuk, Vice Chair, Eric Simpson, and members, Anne Bryan, Tom Colett, Susan Greenberg, LeeAnn Larsen, and Donna Tyner do an excellent job of serving the District's students, parents, staff members, and the overall community.

The decisions they face are complex, challenging, and also rewarding. These men and women volunteer countless hours of unpaid time providing the best possible education for the nearly 41,000 students. Yet school board members are just ordinary citizens with extraordinary dedication to our community's public schools. This month we recognize the vital contributions of these men and women and the crucial role these elected public officials play in the education of our children

In the words of John F. Kennedy, "Let us think of education as the means of developing our greatest abilities, because in each of us there is a private hope and dream which, fulfilled, can be translated into benefit for everyone and greater strength for our nation."

School board members continually put student achievement at the center of what they do and can engage educators as well as community members as they do it, please join me in recognizing the dedication and hard work of all local school board members in preparing today's students for tomorrow's world.

WE Collaborate: The President's Volunteer Service Award – Eleanor Song, David Sha, Jenny Jiang, Jiaqi Zhang, Maggie Bao, Laura Qin, Qiyue Zhang, Jenell Theobald, and Ruolan Nancy Bai

Nine students from the Beaverton School District have been awarded The [President's Volunteer Service Award by the Oregon Chinese Coalition](#) for a combined 1,420 volunteer hours in a single year.

Receiving the gold award are Qiyue Zhang of Westview High School, David Sha, and Maggie Bao of Sunset High School, and Jenell Theobald of Whitford Middle School.

Silver award recipients are Jenny Jiang and Jiaqi Zhang of Sunset High School, and Laura Qin of Westview High School.

The Bronze award goes to Eleanor Song of Stoller Middle School.

Ruolan Bai of Sunset High School is a non-resident student and contributed 271 volunteer hours. Even though she is not qualified for PVSA, her volunteerism won her the Community Volunteer Service Award created by Oregon Chinese Coalition based on the same criteria of PVSA.

District Goal: WE empower all students to achieve post-high school success.

The District prohibits discrimination and harassment based on any basis protected by law, including but not limited to, an individual's actual or perceived race, color, religion, sex, sexual orientation, gender identity, gender expression, national or ethnic origin, marital status, age, mental or physical disability, pregnancy, familial status, economic status, veteran status, or because of a perceived or actual association with any other persons within these protected classes.

These awards acknowledge individuals whose service positively impacts communities and inspires those around them to take action as well. The Oregon Chinese Coalition is honored to have the opportunity to help community youth earn this well-deserved recognition.

In 2003, the President's Council on Service and Civic Participation founded the President's Volunteer Service Award to recognize the important role of volunteers in America's strength and national identity. This award honors individuals whose service positively impacts communities in every corner of the nation and inspires those around them to take action, too.

Led by the [Corporation for National and Community Service](#) and managed in partnership with [Points of Light](#), this program allows Certifying Organizations to recognize their most exceptional volunteers.

The PVSA has continued under each administration, honoring the volunteers who are using their time and talents to solve some of the toughest challenges facing our nation.

Congratulations!

RECOMMENDATION:

It is recommended that the Superintendent recognize Becky Tymchuk, Eric Simpson, Anne Bryan, Tom Colett, Susan Greenberg, LeeAnn Larsen, and Donna Tyner. The School Board recognizes Eleanor Song, David Dahui Sha, Jenny Jiang, Jiaqi Jackie Ahzng, Maggie Bao, Laura Qin, Qiyue Cheery Zhang, Jenell Theobald, and Ruolan Nancy Bai.

District Goal: WE empower all students to achieve post-high school success.

The District prohibits discrimination and harassment based on any basis protected by law, including but not limited to, an individual's actual or perceived race, color, religion, sex, sexual orientation, gender identity, gender expression, national or ethnic origin, marital status, age, mental or physical disability, pregnancy, familial status, economic status, veteran status, or because of a perceived or actual association with any other persons within these protected classes.



SCHOOL REPORT

 School: **Montclair Elementary**

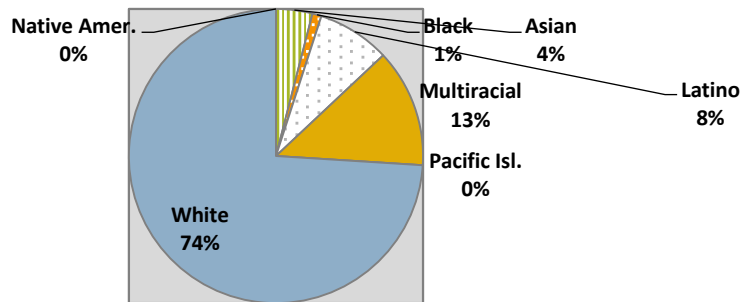
 Principal: **Sean Leverty**

 Years as School Principal: **7**

 Years in BSD: **13**

School Demographics 2018-19

Enrollment: 304
Economically Disadvantaged: 20%
Students with Disabilities: 12%
Ever English Language Learner: 5%
Different Languages Spoken: 13



School Metrics

Kindergarten Readiness

Letter Names*	16-17	17-18	18-19	Early Mathematics	16-17	17-18	18-19
All Students	34.5	33.5	38.1	All Students	9.7	12.9	12.7
Economically Disadvantaged				Economically Disadvantaged			
English Language Learners				English Language Learners			
Students with Disabilities				Students with Disabilities			
Letter Sounds	16-17	17-18	18-19	Approaches to Learning	16-17	17-18	18-19
All Students	14.2	10.8	15.3	All Students	3.6	3.6	3.4
Economically Disadvantaged				Economically Disadvantaged			
English Language Learners				English Language Learners			
Students with Disabilities				Students with Disabilities			

* Combined results for uppercase and lowercase letter assessments.

College Readiness

Grade 3 English Language Arts	16-17	17-18	18-19	Grade 3 Mathematics	16-17	17-18	18-19
All Students	61%	80%	86%	All Students	72%	85%	79%
Economically Disadvantaged				Economically Disadvantaged			
English Language Learners				English Language Learners			
Ever English Language Learners				Ever English Language Learners			
Students with Disabilities				Students with Disabilities			
Talented and Gifted				Talented and Gifted			

District Goal: WE empower all students to achieve post-high school success.

The District prohibits discrimination and harassment based on any basis protected by law, including but not limited to, an individual's actual or perceived race, color, religion, sex, sexual orientation, gender identity, gender expression, national or ethnic origin, marital status, age, mental or physical disability, pregnancy, familial status, economic status, veteran status, or because of a perceived or actual association with any other persons within these protected classes.

Asian				Asian			
Hispanic/Latino				Hispanic/Latino			
White	64%	81%	86%	White	71%	88%	81%
Multi-racial				Multi-racial			
Male	68%	73%	87%	Male	80%	83%	83%
Female	55%	88%	86%	Female	66%	87%	75%

Grade 5 English Language Arts	16-17	17-18	18-19	Grade 5 Mathematics	16-17	17-18	18-19
All Students	84%	79%	75%	All Students	68%	62%	41%
Economically Disadvantaged		67%		Economically Disadvantaged		48%	
English Language Learners				English Language Learners			
Ever English Language Learners				Ever English Language Learners			
Students with Disabilities				Students with Disabilities			
Talented and Gifted				Talented and Gifted			
Asian				Asian			
Hispanic/Latino				Hispanic/Latino			
White	84%	80%	74%	White	68%	64%	44%
Multi-racial				Multi-racial			
Male	75%	74%	77%	Male	72%	67%	59%
Female	94%	82%	72%	Female	64%	59%	28%

Growth English Language Arts	16-17	17-18	18-19	Growth Mathematics	16-17	17-18	18-19
All Students	48%	47%	48%	All Students	46%	40%	41%
Economically Disadvantaged	46%	44%		Economically Disadvantaged	43%	39%	
English Language Learners				English Language Learners			
Ever English Language Learners				Ever English Language Learners			
Students with Disabilities				Students with Disabilities			
Talented and Gifted				Talented and Gifted			
Asian				Asian			
Hispanic/Latino				Hispanic/Latino			
White	51%	43%	48%	White	45%	40%	41%
Multi-racial				Multi-racial			
Male	47%	56%	61%	Male	47%	46%	59%
Female	48%	41%	36%	Female	45%	36%	25%

2018-19 Participation Rates

Smarter Balanced ELA: **99%**

Smarter Balanced Math: **99%**

Student Survey: **95%**

Absence and Exclusion Measures	16-17	17-18	18-19	Annual Survey Responses	16-17	17-18	18-19
Students missing fewer than 10 days of school	74%	72%	70%	Students reporting that at least one adult cares about them	84%	92%	91%
Students missing class due to suspensions or expulsion	5	3	5	Parents reporting they feel informed and valued as active partners in their child's education	88%	93%	94%
Number of class days missed due to suspensions or expulsion	8	3	8.5	Teachers and staff reporting they contribute to school decision making	84%	88%	

Data is not reported when there are fewer than 20 students, parents, or staff in the denominator.

Successes:

Of the metrics above, what are you most proud of and why?:

As evident from the data represented in this school report, Montclair has areas of growth that deserve attention; however, we're cognizant of our successes as well. An area that provides a foundation for learning at Montclair and drives our intervention program is our reading program. When the data is taken collectively (3rd-5th), ELA achievement has grown by 6 percentage points each year for the past 4 years. Obviously, those gains are most apparent when perusing the Grade 3 English Language Arts data. From 3rd Grade 16-17 OSAS data to 18-19 OSAS data our achievement scores have increased by 25%, and that achievement is reflected across the board - male and female, as well as all subgroups. This success is partly due to how we restructured our intervention program, designed to target reading skill development exclusively, and partly due to our teachers' embrace of the workshop model. We love to hear excited voices talking about content, but when you enter our reading classrooms all you hear is silence – students in texts, building fluency and accuracy.

What I'm most excited about is not reflected in the data represented on this document. In all areas, ELA and math achievement and growth, two subgroups, our English language learners and our students with disabilities experienced dramatic gains over the past few years. ELA achievement saw a 21% increase, on average, for both subgroups, math achievement experienced an 11% on average gain, ELA growth was a 22% on average increase, and math growth achieved a 24% on average gain. This growth is a product of the intervention work that we've undertaken at Montclair through our collaborative co-teaching ELD model and improvements in how we serve students with disabilities. Our Intervention program has tackled academic needs early on in order to address gaps in learning, which has decreased the number of special education referrals and improved academic outcomes in the general education classroom. We began an 8-week review protocol that allowed stakeholders to gather and address next steps for individual students. Additionally, our Sped Instructor has implemented a structured approach to scheduling that utilized lessons based on need rather than grade level or age variants in order to target learning gaps in our students with disabilities.

While our Ever English language learner population has decreased over the past few years, we've also seen more Els transition into monitoring status after having scored *proficient* on their ELPA assessment. We feel the combined efforts of implementing our co-teaching model, as well as securing a highly gifted ELD Teacher led to this success. As you know, the co-teaching model's most important component is allowing our Els to remain in the classroom and receive ELD instruction alongside their peers while immersed in the primary instruction of the general education classroom. In 16-17 we acquired an expert ELD Teacher experienced in English language development instruction, as well as an expert in coaching staff in supporting our English learners.

Finally, students reporting that *at least one adult cares* continues to show improvement. Large contributors to this success have been in part due to the way we engage with students that are impacted. The language used and the supports provided to reassure students, especially those exhibiting anxiety, that we understand and care has been instrumental. Our restorative practices protocols provide evidence that adults take students' concerns seriously and will do something about their concerns to rectify the situation; included in resolution is a concerted effort to empower victims, or students whom lack their own voice. We want students to know, even though they may not see the consequence applied, their concerns are not falling on deaf ears. In engaging in social emotional learning early on our staff have been able to demonstrate attentive listening and empathy while helping build lagging skills within the classroom. All of these interpersonal opportunities contribute to students feeling valued and successful.

Challenges:

Of the metrics above, what are you most concerned about and why?:

Historically, Montclair Red-tailed Hawks have always thought of themselves as an accelerated group that met each benchmark with zeal and ease; however, that reflection has been altered over the past few years. Our demographics have changed, we're experiencing more trauma and academically impacted students across all socio-economic levels, and best practices in pedagogy have challenged our delivery of instruction. While we have experienced successes, we are now more aware of the challenges that lay ahead.

The most striking challenge for Montclair is around our mathematical practices, specifically how to implement the curriculum and workshop model with fidelity, while still providing direct instruction that targets achievement gaps and motivates learners. We're grappling with implementing innovative and effective teaching techniques that allow all students access to content at the right time, at the right level and with the right supports. We're feeling the constraints with the density of our math standards in relation to the length of the school year, and we're simply trying to understand the math, so we can then convey content to our students. How this plays out with our OSAS test scores is self-evident. Again, 3rd Grade achievement reflects a greater success than 5th Grade achievement, where we've dipped down significantly. Additionally, mathematic *growth* across the board presents an area where dramatic gains are needed. And identifying what strategies trigger a movement in growth, including English language arts growth, have been a struggle.

Action Plan:

What is your plan of action to address these concerns?:

Despite being a small school, with a skeletal staff supporting our 321 students, when we work together we can achieve great outcomes. We recognize not all celebrations are reflected in one state assessment, and we're encouraged by the small successes that impact our students daily. With that said, Montclair is prepared to push up our sleeves and get to work.

With regards to the challenges mentioned above, we look forward to focusing on our School Learning Plan and the work we've begun in unpacking and applying our understanding of the new mathematical practices. We've enlisted the support and guidance of the District's Math TOSAs, who have come in to provide timely professional development and model best practices. We're leaning in and listening, as well as collaborating around math lesson studies being conducted throughout the school year. We've designated one Tuesday each month to math – math collaboration, math discussion, math alignment, math planning, and all things math. We've engaged in vertical and horizontal math alignment, bringing to light gaps in our K-5 instruction and refining our understanding of what each level teaches. This has allowed our teachers to change their mathematical practices and tailor to each incoming student group. We're beginning to offer math intervention supports at the expense of our ELA intervention program. One key component of mathematical practices is redefining, through the viewpoint of students, what it means to be a mathematician and developing perseverance to tackle hard problems. To this end our Student Success Coach has worked extensively with our K-5 general education teachers to embed social emotional learning into our math lessons. We're relooking at how we confer with our young mathematicians in order to nudge their thinking, as well as their learning to higher levels of success.

In addition to all of the action plan implementations above, we recognize that students cannot learn the math unless they understand their own mathematical thinking. Unpacking one's misconceptions requires talking about what we think and know, as well as altering our beliefs based on what we glean from others. That is why we've added the English language development component to our School Learning Plan, and why our ELD professional development is directly tied to mathematics. Student talk is instrumental throughout the day, but finding ways to create student talk opportunities within the math classroom have been a struggle. Most teachers developed professional goals this fall around building a repertoire of student talk activities and

embedding those activities into their math lessons. Helping learners feel comfortable with talking about math is a primary goal at Montclair. Through our efforts we hope to move the dial on what we've recently experienced as our math reality.



SCHOOL REPORT

School: West Tualatin View Elementary

Principal: Scarlet Valentine

Years as School Principal: 9

Years in BSD: 13

School Demographics 2018-19

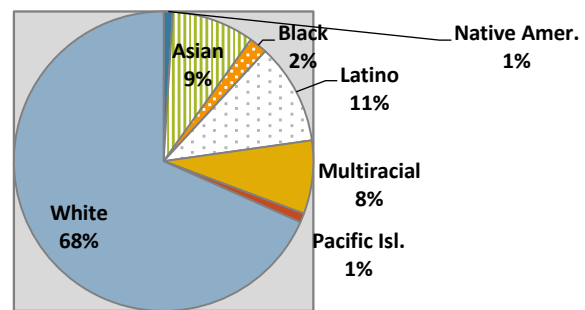
Enrollment: 349

Economically Disadvantaged: 15%

Students with Disabilities: 19%

Ever English Language Learner: 5%

Different Languages Spoken: 17



School Metrics

Kindergarten Readiness

Letter Names*	16-17	17-18	18-19	Early Mathematics	16-17	17-18	18-19
All Students	41.3	34.0	40.0	All Students	10.2	12.4	13.0
Economically Disadvantaged				Economically Disadvantaged			
English Language Learners				English Language Learners			
Students with Disabilities				Students with Disabilities			
Letter Sounds	16-17	17-18	18-19	Approaches to Learning	16-17	17-18	18-19
All Students	16.9	13.2	15.4	All Students	4.0	3.6	3.9
Economically Disadvantaged				Economically Disadvantaged			
English Language Learners				English Language Learners			
Students with Disabilities				Students with Disabilities			

* Combined results for uppercase and lowercase letter assessments.

College Readiness

Grade 3 English Language Arts	16-17	17-18	18-19	Grade 3 Mathematics	16-17	17-18	18-19
All Students	76%	86%	77%	All Students	76%	83%	77%
Economically Disadvantaged				Economically disadvantaged			
English Language Learners				English Language Learners			
Ever English Language Learners				Ever English Language Learners			
Students with Disabilities				Students with Disabilities			
Talented and Gifted				Talented and Gifted			
Asian				Asian			

District Goal: WE Empower all students to achieve post-high school success.

"The District prohibits discrimination and harassment based on any basis protected by law, including but not limited to, an individual's actual or perceived race, color, religion, sex, sexual orientation, gender identity, gender expression, national or ethnic origin, marital status, age, mental or physical disability, pregnancy, familial status, economic status, veteran status, or because of a perceived or actual association with any other persons within these protected classes."

Hispanic/Latino				Hispanic			
White	81%	85%	75%	White	75%	85%	78%
Multi-racial				Multi-racial			
Male	64%	85%	83%	Male	77%	85%	83%
Female	87%	88%	70%	Female	74%	80%	70%

Grade 5 English Language Arts	16-17	17-18	18-19	Grade 5 Mathematics	16-17	17-18	18-19
All Students	66%	80%	78%	All Students	67%	70%	60%
Economically Disadvantaged				Economically disadvantaged			
English Language Learners				English Language Learners			
Ever English Language Learners				Ever English Language Learners			
Students with Disabilities				Students with Disabilities			
Talented and Gifted				Talented and Gifted			
Asian				Asian			
Hispanic/Latino				Hispanic			
White	63%	82%	81%	White	67%	69%	60%
Multi-racial				Multi-racial			
Male	64%	75%	73%	Male	65%	75%	64%
Female		88%	83%	Female		62%	57%

Growth English Language Arts	16-17	17-18	18-19	Growth Mathematics	16-17	17-18	18-19
All Students	50%	61%	57%	All Students	54%	62%	60%
Economically Disadvantaged				Economically Disadvantaged		56%	
English Language Learners				English Language Learners			
Ever English Language Learners				Ever English Language Learners			
Students with Disabilities				Students with Disabilities			
Talented and Gifted	50%			Talented and Gifted			
Asian				Asian			
Hispanic/Latino				Hispanic/Latino			
White	62%	65%	54%	White	44%	59%	65%
Multi-racial				Multi-racial			
Male	54%	60%	59%	Male	58%	66%	2%
Female	44%	62%	53%	Female	47%	57%	58%

2018-19 Participation Rates

Smarter Balanced ELA: **98%**

Smarter Balanced Math: **97%**

Student Survey: **97%**

Absence and Exclusion Measures	16-17	17-18	18-19	Annual Survey Responses	16-17	17-18	18-19
Students missing fewer than 10 days of school	74%	77%	73%	Students reporting that at least one adult cares about them	89%	90%	89%
Students missing class due to suspensions or expulsion	0	2	0	Parents reporting they feel informed and valued as active partners in their child's education	92%	87%	97%
Number of class days missed due to suspensions or expulsion	0	1.5	0	Teachers and staff reporting they contribute to school decision making	61%	85%	

Data is not reported when there are fewer than 20 students, parents, or staff in the denominator.

Successes:

West Tualatin View Elementary School is a Primary Years Programme (PYP) school and is located north of Highway 26 in a relatively high socio-economic area where approximately 15% of its students qualify for

free/reduced lunch. West TV's current enrollment is 355 students. We have an average class size of 24 students. There are two classrooms at every grade level except for Kindergarten and 5th grade which have three classrooms each. We also have one Special Education Specialized Program classroom (SCC) with students in grades 2 through 5.

We are very proud of our diverse population of students at West TV. Here are some statistics of our current student body population:

- Over 18 different languages are spoken
- 8% of our students are English Language Learners
- 9% of our population is Asian, 71% White, 8% multiracial, 9% Hispanic/Latino and 1% Black/African American

Academic achievement has consistently been high in both math and reading.

Our very involved PTC raised over \$55,000 last year to support West TV student activities, technology, literacy, STEAM night, and a variety of enrichment programs and materials in 2018-19. We have strong parent involvement with volunteers running our Art Literacy and Continent Club programs.

West TV's strong partnership with its PTC and volunteers, as well as its outstanding faculty, are two of the main reasons West TV students continue to receive such an outstanding educational experience year after year. When surveyed last year, 97% of parents reported that they feel informed and valued as active partners in their child's education.

Challenges:

I am most concerned about the decrease in Growth in both English Language Arts and Math. I attribute this decline to the adoption of the new ELA curriculum and the new Math curriculum. Teachers are learning the reading, writing, and math workshop models and working toward mastery of the new curriculum materials. Our school also experienced an increase in the number of students with challenging behaviors that impacted learning in classrooms. Last year we had an increase of students with mental health and behavioral needs and that number continues to rise each year.

Action Plan:

This year we are continuing our professional development focus in ELA and Math. Teachers are becoming expert with the reading, writing and math workshop models. We scored a Level 4 in both ELA Growth and Math Growth on the State Report Card last year. Our goal this year is to raise the median growth percentile for all students in ELA and Math from Level 4 (56.5% and 57.5% respectively) to Level 5 (60%).

In order to achieve this goal I will ensure consistent curriculum and instruction implementation in all classrooms by providing time for staff to collaborate and by conducting walk-through observations regularly in order to observe common curriculum implementation and instruction in classrooms.

We are addressing the challenging student behavior by adopting Social Emotional Learning (SEL) programs schoolwide to help students stay regulated throughout the school day. We also have a half time Student Success Coach again this year who works alongside classroom teachers to assist them in implementing SEL programs with students – programs such as Zones of Regulation, Calming Spaces and Community Building (Community Circles).

Beaverton School District
Year-To-Date Activity and Forecast
General Fund
For the Period Ended December 31, 2019
(\$ in millions)

	Budget			Activity			
	Adopted Budget	Final Budget	Working Budget	YTD Actuals	Current Encumb.	Actuals & Encumb.	Year-End Forecast
REVENUES:							
Beginning Fund Balance	\$ 16.9	\$ 16.9	\$ 16.9	\$ 16.9	\$ -	\$ 16.9	\$ 16.9
State School Fund:							
State School Fund	276.0	276.0	276.0	160.0	-	160.0	276.0
Property Taxes	143.0	143.0	143.0	134.4	-	134.4	143.0
Common School Fund	3.9	3.9	3.9	-	-	-	3.9
County School Fund	0.6	0.6	0.6	0.5	-	0.5	0.6
Local Option Levy	35.0	35.0	35.0	32.0	-	32.0	34.0
Investment Earnings	1.8	1.8	1.8	-	-	-	1.8
NWRESD Appointment	11.4	11.4	11.4	6.1	-	6.1	11.4
Transfers In	18.4	18.4	18.4	18.4	-	18.4	18.4
Other	8.6	8.6	8.6	2.9	-	2.9	8.6
Total	\$ 515.6	\$ 515.6	\$ 515.6	\$ 371.2	\$ -	\$ 371.2	\$ 514.6
EXPENDITURES:							
Salaries	\$ 267.9	\$ 267.9	\$ 270.9	\$ 113.3	\$ -	\$ 113.3	\$ 270.9
Benefits	172.7	172.7	172.7	69.5	-	69.5	172.7
Purchased services	28.0	28.0	28.4	10.4	11.6	22.0	28.4
Supplies & materials	14.6	14.6	14.8	5.7	1.8	7.5	14.8
Capital outlay	0.7	0.7	0.7	0.4	0.2	0.6	0.7
Other	2.4	2.4	2.4	1.3	0.1	1.4	2.4
Transfers out	4.3	4.3	4.3	1.5	-	1.5	4.3
Contingency	25.0	25.0	25.0				25.0
Total	\$ 515.6	\$ 515.6	\$ 519.2	\$ 202.1	\$ 13.7	\$ 215.8	\$ 519.2
Projected Surplus / (Deficit) Balance							\$ (4.6)
Projected Ending Fund Balance							\$ 20.4
Projected ending fund balance percentage of actual (forecast) revenue at 6/30/2020 *							4.0%

*Projected ending fund balance breakdown:		Projected EFB	
General Operating Fund		\$ 20.3	3.9%
Local Option Levy Fund		0.1	0.1%

	Budget			Activity			
	Adopted Budget	Final Budget	Working Budget	YTD Actuals	Current Encumb.	Actuals & Encumb.	Year-End Forecast
APPROPRIATIONS:							
Instruction	\$ 305.1	\$ 305.1	\$ 306.1	\$ 124.1	\$ 3.7	\$ 127.8	\$ 306.1
Support Services	179.4	179.4	181.5	75.5	9.8	85.3	181.5
Enterprise & Community Svc	0.3	0.3	0.3	-	-	-	0.3
Facilities Acquisition & Const	0.1	0.1	0.1	-	-	-	0.1
Other Uses	5.7	5.7	6.2	2.5	0.2	2.7	6.2
Contingencies	25.0	25.0	25.0				25.0
Total	\$ 515.6	\$ 515.6	\$ 519.2	\$ 202.1	\$ 13.7	\$ 215.8	\$ 519.2

Adjustments in Year-End Forecast:

* Local option revenue forecast reduced by \$1 million based on assessed amounts and projected collections.

Beaverton School District
Summary of Revenue, Expenditures and Encumbrances
All Funds Except General Fund
For the Period Ended December 31, 2019

Funds	Final Budget	YTD Revenue	YTD Expenditures	Encumb.	YTD Expenditures & Encumb.	Expenditure Budget Variance		Fund Balance
	<i>(Incl Beg Fund Bal)</i>	<i>(Incl Beg Fund Bal)</i>	<i>(Incl transfers out)</i>			\$	%	
Student Body Fund	\$ 10,700,000	\$ 8,176,852	\$ 203,087	\$ 113,076	\$ 316,163	\$ (10,383,837)	2.95%	\$ 7,860,689
Special Purpose Fund	9,160,000	2,941,583	1,964,259	217,471	2,181,730	(6,978,270)	23.82%	759,853
Categorical	4,025,000	2,735,228	279,692	308,430	588,122	(3,436,878)	14.61%	2,147,106
Grant Fund	57,497,749	5,410,661	10,603,600	2,211,709	12,815,309	(44,682,440)	22.29%	(7,404,648)
Equipment Replacement Fund	4,048,000	3,686,111	1,277,992	1,523,442	2,801,434	(1,246,566)	69.21%	884,677
Sustainability Fund	22,236,279	22,236,279	18,413,036	-	18,413,036	(3,823,243)	82.81%	3,823,243
Nutrition Services Fund	18,766,435	7,774,580	5,674,562	3,102,153	8,776,715	(9,989,720)	46.77%	(1,002,135)
Debt Service Fund	85,461,801	70,801,026	18,069,992	-	18,069,992	(67,391,809)	21.14%	52,731,034
Capital Projects Fund	244,134,000	213,923,180	41,183,665	53,897,745	95,081,410	(149,052,590)	38.95%	118,841,770
Insurance Reserve Fund	6,825,667	2,977,271	2,692,430	933,700	3,626,130	(3,199,537)	53.12%	(648,859)
Workers' Compensation Fund	3,828,815	2,953,596	1,349,739	130,672	1,480,411	(2,348,404)	38.66%	1,473,185
Scholarship Fund	450,000	407,063	21,250	12,250	33,500	(416,500)	7.44%	373,563
Total	\$ 467,133,746	\$ 344,023,430	\$ 101,733,304	\$ 62,450,648	\$ 164,183,952	\$ (302,949,794)		\$ 179,839,478



BEAVERTON SCHOOL DISTRICT CLASSROOM TEACHER ALLOCATION 2019-20
As of 12/31/19

School	Budgeted Enrollment	9/30/19 Enrollment	Enrollment Change	Budget		Actual		Increase
				Without Levy APU	With Levy APU	Without Levy APU	With Levy APU	
Aloha Huber (K-8)	907	893	(14)	35.3	40.3	34.3	39.3	
Barnes	624	590	(34)	23.3	27.3	24.3	28.3	
Beaver Acres	707	737	30	27.5	32.5	27.3	32.3	
Bethany	531	528	(3)	20.5	24.5	19.5	23.5	
Bonny Slope	665	655	(10)	26.5	31.5	25.3	30.3	
Cedar Mill	421	428	7	15.5	20.5	15.3	20.3	
Chehalem	469	480	11	18.5	22.5	18.3	22.3	
Cooper Mountain	454	486	32	18.5	21.5	18.2	21.2	
Elmonica	582	550	(32)	21.5	25.5	21.2	25.2	
Errol Hassell	436	426	(10)	15.5	20.5	15.3	20.3	
Findley	643	636	(7)	25.5	29.5	24.3	28.3	
Fir Grove	362	387	25	13.5	17.5	14.2	18.2	
Greenway	320	325	5	12.3	15.3	12.2	15.2	
Hazeldale	437	485	48	17.5	21.5	17.3	21.3	
Hiteon	625	651	26	24.5	28.5	24.3	28.3	
Jacob Wismer	714	727	13	27.5	32.5	28.2	33.2	
Kinnaman	589	617	28	24.5	29.5	24.7	29.7	
McKay	273	294	21	12.3	16.3	11.2	15.2	
McKinley	616	654	38	24.5	28.5	25.2	29.2	
Montclair	290	319	29	10.5	14.5	11.2	15.2	
Nancy Ryles	646	630	(16)	23.5	26.5	23.3	26.3	
Oak Hills	554	576	22	22.5	27.5	22.2	27.2	
Raleigh Hills (K-8)	526	532	6	20.5	25.5	20.3	25.3	
Raleigh Park	343	340	(3)	13.5	17.5	12.3	16.3	
Ridgewood	371	432	61	14.5	18.5	15.2	19.2	
Rock Creek	564	516	(48)	20.5	24.5	20.3	24.3	
Sato	660	672	12	25.5	29.5	26.1	30.1	
Scholls Heights	548	594	46	22.5	27.5	22.4	27.4	
Sexton Mountain	527	543	16	22.5	26.5	22.3	26.3	
Springville (K-8)	866	884	18	33.5	38.5	35.0	40.0	
Terra Linda	354	371	17	14.5	18.5	14.1	18.1	
Vose	640	708	68	25.3	30.3	25.1	30.1	
West TV	327	347	20	12.5	15.5	13.2	16.2	
William Walker	421	518	97	18.3	22.3	18.2	22.2	
Elementary School Total	18,012	18,531	519	704.6	848.6	701.1	845.1	144.0



BEAVERTON SCHOOL DISTRICT CLASSROOM TEACHER ALLOCATION 2019-20 As of 12/31/19

School	Budgeted Enrollment	9/30/19 Enrollment	Enrollment Change	Budget		Actual		Increase
				Without Levy APU	With Levy APU	Without Levy APU	With Levy APU	
Cedar Park	943	941	(2)	29.6	36.6	30.2	37.2	
Conestoga	967	975	8	30.3	37.3	30.4	37.4	
Five Oaks	968	1,010	42	33.9	40.9	34.5	41.5	
Highland Park	813	777	(36)	25.8	31.8	25.8	31.8	
Meadow Park	805	834	29	30.0	36.0	30.0	36.0	
Mountain View	889	853	(36)	30.5	37.5	30.5	37.5	
Stoller	1,559	1,560	1	49.6	59.6	50.3	60.3	
Whitford	695	706	11	26.5	32.5	26.5	32.5	
Middle School Total	7,639	7,656	17	256.2	312.2	258.1	314.1	56.00
Aloha	1,700	1,751	51	64.7	75.7	60.8	71.8	
Beaverton	1,491	1,469	(22)	59.5	69.5	59.2	69.2	
Mountainside	1,766	1,787	21	58.7	70.5	57.8	69.6	
Southridge	1,391	1,380	(11)	51.3	60.3	50.6	59.6	
Sunset	1,936	1,971	35	65.5	77.5	65.6	77.6	
Westview	2,301	2,382	81	77.9	91.9	78.3	92.3	
High School Total	10,585	10,740	155	377.6	445.4	372.4	440.2	67.80
Arts & Communication Magnet Academy (ACMA)	720	706	(14)	25.8	31.8	25.6	31.6	
Community School	146	128	(18)	10.4	11.6	10.2	11.4	
Health & Science High School	726	706	(20)	25.5	30.5	25.4	30.4	
International School of Beaverton	860	847	(13)	31.8	38.8	31.7	38.7	
School of Science & Technology	176	175	(1)	5.4	7.4	5.2	7.2	
Options Schools Total	2,628	2,562	(66)	98.9	120.1	98.1	119.3	21.20
Address Extreme Class Size K-12	-	-	-	5.0	5.0	-	0.0	
District Total	38,864	39,489	625	1,442.3	1,731.3	1,429.6	1,718.6	289.0

	Adopted Budget	Current Projection	Year-to-Date Actual
Beginning Fund Balance 7/1/19	\$ -	\$ 93,354	\$ 93,354
Projected Revenue:	35,000,000	34,000,000	31,990,532
Projected Expense:	35,000,000	35,000,000	14,835,960
Projected Fund Balance 6/30/20:	\$ -	\$ (906,646)	\$ 17,247,926

Note: Revenue has been updated to current projections. Expenses will be adjusted in January to reflect this change in revenue projections.

Beaverton School District
Portfolio Management
Portfolio Summary
December 31, 2019

Investments	Par Value	Market Value	Book Value	% of Portfolio	Term	YTM	YTM 365 Equiv.
Corporate Notes	98,026,000.00	98,467,738.96	97,955,696.15	24.70	550	1.863	1.863
Commercial Paper Disc. -At Cost	55,000,000.00	54,627,900.00	54,585,363.89	13.77	166	1.637	1.660
Federal Agency Coupon Securities	63,000,000.00	63,358,090.00	63,463,150.00	16.01	897	1.896	1.896
Federal Agency Disc. -At Cost	50,496,000.00	50,177,096.72	49,852,079.29	12.57	241	1.729	1.753
Treasury Coupon Securities	45,000,000.00	45,177,000.00	45,138,930.00	11.38	252	1.589	1.589
Treasury Discounts -At Cost	40,590,000.00	40,351,003.80	39,965,969.51	10.08	227	1.768	1.792
LGIP	35,558,622.29	35,558,622.29	35,558,622.29	8.97	1	2.250	2.250
Sweep Accounts	10,000,000.00	10,000,000.00	10,000,000.00	2.52	1	0.850	0.850
	397,670,622.29	397,717,451.77	396,519,811.13	100.00%	384	1.789	1.798
Investments							
Cash and Accrued Interest							
Accrued Interest at Purchase		151,152.77	151,152.77				
Subtotal		151,152.77	151,152.77				
Total Cash and Investments	397,670,622.29	397,868,604.54	396,670,963.90		384	1.789	1.798

**Beaverton School District
Portfolio Management
Portfolio Details - Investments
December 31, 2019**

CUSIP	Investment #	Issuer	Average Balance	Purchase Date	Par Value	Market Value	Book Value	Stated Rate	Term	YTM	YTM 365	Maturity Date
Corporate Notes												
037833CL2	11131	Apple Corp		12/10/2019	10,000,000.00	10,003,200.00	10,007,000.00	2.094	59	0.000	0.000	02/07/2020
05253JAQ4	11127	Aust & NZ Banking Grp NY		10/22/2019	5,000,000.00	5,059,450.00	5,076,400.80	2.550	763	1.800	1.800	11/23/2021
06051GFN4	11129	Bank of America		12/10/2019	2,000,000.00	2,001,880.00	2,004,100.00	2.250	133	1.678	1.678	04/21/2020
06367T4W7	11122	Bank of Montreal		09/26/2019	5,000,000.00	5,081,650.00	5,094,868.00	3.100	565	1.850	1.850	04/13/2021
06416CAB4	11007	Bank of Nova Scotia		05/24/2017	5,000,000.00	4,998,400.00	5,006,950.00	1.850	1,056	1.800	1.800	04/14/2020
064159LG09	11123	Bank of Nova Scotia		09/26/2019	5,000,000.00	5,079,000.00	5,097,953.90	3.125	572	1.850	1.850	04/20/2021
17275RAX0	11057	Cisco Corp		05/14/2018	5,000,000.00	5,014,800.00	4,973,250.00	2.450	763	2.715	2.715	06/15/2020
594918BV5	11056	Microsoft Corp		05/03/2018	6,026,000.00	6,025,758.96	5,954,290.60	1.850	644	2.545	2.545	02/06/2020
58933YAP0	11130	Merck & Co Inc		12/10/2019	10,000,000.00	10,005,400.00	10,010,400.00	2.276	62	0.000	0.000	02/10/2020
78012KC62	11084	Royal Bank of Canada		12/03/2018	5,000,000.00	5,001,850.00	4,946,150.00	2.125	455	3.010	3.010	03/02/2020
89114QBL1	11104	Toronto Dominion Bank		01/30/2019	5,000,000.00	5,003,500.00	4,864,400.00	1.800	895	2.954	2.954	07/13/2021
89114QBL1	11126	Toronto Dominion Bank		10/18/2019	5,000,000.00	5,003,500.00	5,004,207.85	1.800	634	1.750	1.750	07/13/2021
89236TCF0	11008	Toyota Cap Corp		05/24/2017	5,000,000.00	5,001,300.00	5,054,350.00	2.150	1,023	1.750	1.750	03/12/2020
89236TCF0	11139	Toyota Cap Corp		12/16/2019	5,000,000.00	5,001,300.00	5,004,275.00	2.150	87	1.781	1.781	03/12/2020
90331HMX7	11089	US Bank		12/12/2018	5,000,000.00	5,149,050.00	5,034,650.00	3.450	1,070	3.200	3.200	11/16/2021
961214DA8	11090	Westpac Banking Corp		12/12/2018	5,000,000.00	5,006,500.00	4,828,250.00	2.000	981	3.347	3.347	08/19/2021
94988J5L7	11083	Wells Fargo Co		12/03/2018	5,000,000.00	5,000,750.00	4,966,150.00	2.400	408	3.020	3.020	01/15/2020
94974BGR5	11118	Wells Fargo Co		09/16/2019	5,000,000.00	5,030,450.00	5,028,050.00	2.550	448	2.082	2.082	12/07/2020
Subtotal and Average			89,140,934.05		98,026,000.00	98,467,738.96	97,955,696.15		550	1.863	1.863	
Commercial Paper Disc. -At Cost												
22533TDP8	11138	Creidt Agricole CIB NY		12/11/2019	10,000,000.00	9,944,900.00	9,943,050.00		134	1.539	1.560	04/23/2020
2254EAFB4	11134	Credit Suisse USA		12/11/2019	15,000,000.00	14,877,900.00	14,879,525.00		183	1.619	1.642	06/11/2020
53943RFF1	11128	Lloyds Bank PLC		10/21/2019	10,000,000.00	9,916,600.00	9,881,000.00		238	1.849	1.875	06/15/2020
63873JEK2	11137	Natixis NY		12/11/2019	10,000,000.00	9,931,000.00	9,928,888.89		160	1.611	1.634	05/19/2020
30229ACW7	11136	Exxon Mobil Corp		12/13/2019	10,000,000.00	9,957,500.00	9,952,900.00		108	1.577	1.599	03/30/2020
Subtotal and Average			39,522,478.76		55,000,000.00	54,627,900.00	54,585,363.89		166	1.637	1.660	
Federal Agency Coupon Securities												
313383HU8	11022	Federal Home Loan Bank		06/26/2017	18,000,000.00	18,005,040.00	18,125,820.00	1.750	1,082	1.508	1.508	06/12/2020
313371U79	11106	Federal Home Loan Bank		01/30/2019	10,000,000.00	10,137,300.00	10,093,000.00	3.125	681	2.609	2.609	12/11/2020
3134GBQZ8	11004	Federal Home Loan Mtg Corp		05/22/2017	20,000,000.00	19,994,400.00	20,000,000.00	1.550	1,096	1.550	1.550	05/22/2020
3135GOT29	11119	Federal National Mtg Assn		09/13/2019	5,000,000.00	4,999,050.00	4,993,150.00	1.500	168	1.800	1.800	02/28/2020
880591EL2	11105	Tenn Valley Auth		01/30/2019	10,000,000.00	10,222,300.00	10,251,180.00	3.875	747	2.603	2.603	02/15/2021

**Beaverton School District
Portfolio Management
Portfolio Details - Investments
December 31, 2019**

CUSIP	Investment #	Issuer	Average Balance	Purchase Date	Par Value	Market Value	Book Value	Stated Rate	Term	YTM	YTM 365	Maturity Date
Subtotal and Average			63,463,150.00		63,000,000.00	63,358,090.00	63,463,150.00		897	1.896	1.896	
Federal Agency Disc. -At Cost												
313384WT2	11133	Federal Home Loan Bank		12/10/2019	20,000,000.00	19,885,800.00	19,873,720.00		154	1.485	1.506	05/12/2020
313396XD0	11141	Federal Home Loan Mtg Corp		12/20/2019	3,000,000.00	2,981,550.00	2,980,044.17		154	1.565	1.587	05/22/2020
76116FAD9	11120	Resolution Funding Corp		09/23/2019	5,000,000.00	4,953,950.00	4,927,050.00		296	1.823	1.849	07/15/2020
76116FAD9	11121	Resolution Funding Corp		09/23/2019	10,000,000.00	9,907,900.00	9,854,100.00		296	1.823	1.849	07/15/2020
88059EMW1	11124	Tenn Valley Auth		09/30/2019	8,296,000.00	8,290,358.72	8,252,197.12		107	1.786	1.811	01/15/2020
912833LA6	11060	U.S. Treasury Strips		05/24/2018	4,200,000.00	4,157,538.00	3,964,968.00		814	2.604	2.641	08/15/2020
Subtotal and Average			42,255,810.93		50,496,000.00	50,177,096.72	49,852,079.29		241	1.729	1.753	
Treasury Coupon Securities												
912828WY2	11103	U.S. Treasury		01/30/2019	5,000,000.00	5,050,400.00	4,963,730.00	2.250	913	2.551	2.551	07/31/2021
912828ND8	11132	U.S. Treasury		12/12/2019	20,000,000.00	20,133,600.00	20,167,200.00	3.500	155	1.520	1.520	05/15/2020
912828XU9	11135	U.S. Treasury		12/12/2019	20,000,000.00	19,993,000.00	20,008,000.00	1.500	186	1.421	1.421	06/15/2020
Subtotal and Average			30,883,213.87		45,000,000.00	45,177,000.00	45,138,930.00		252	1.589	1.589	
Treasury Discounts -At Cost												
912796WN5	11140	U.S. Treasury		12/19/2019	30,000,000.00	29,985,300.00	29,967,391.67	1.505	26	1.507	1.528	01/14/2020
912820M87	11096	U.S. Treasury Strips		01/23/2019	10,590,000.00	10,365,703.80	9,998,577.84		828	2.550	2.585	04/30/2021
Subtotal and Average			22,565,548.54		40,590,000.00	40,351,003.80	39,965,969.51		227	1.768	1.792	
LGIP												
LGIP 4010	LGIP4010	LGIP		07/01/2006	16,803,284.48	16,803,284.48	16,803,284.48	2.250	1	2.250	2.250	
LGIP 4966	LGIP4966	LGIP		05/11/2017	16,087,802.36	16,087,802.36	16,087,802.36	2.250	1	2.250	2.250	
LGIP 4972	LGIP4972	LGIP		05/11/2017	2,146,500.42	2,146,500.42	2,146,500.42	2.250	1	2.250	2.250	
LGIP 5173	LGIP5173	LGIP		06/30/2006	521,035.03	521,035.03	521,035.03	2.250	1	2.250	2.250	
Subtotal and Average			95,713,125.92		35,558,622.29	35,558,622.29	35,558,622.29		1	2.250	2.250	
Sweep Accounts												
USB_SWEEP	USB_SWEEP	US Bank		06/30/2019	10,000,000.00	10,000,000.00	10,000,000.00	0.850	1	0.850	0.850	
Subtotal and Average			10,000,000.00		10,000,000.00	10,000,000.00	10,000,000.00		1	0.850	0.850	

**Beaverton School District
Portfolio Management
Portfolio Details - Investments
December 31, 2019**

CUSIP	Investment #	Issuer	Average Balance	Purchase Date	Par Value	Market Value	Book Value	Stated Rate	Term	YTM	YTM 365
Total and Average			393,544,262.08		397,670,622.29	397,717,451.77	396,519,811.13		384	1.789	1.798

**Beaverton School District
Portfolio Management
Portfolio Details - Cash
December 31, 2019**

CUSIP	Investment #	Issuer	Average Balance	Purchase Date	Par Value	Market Value	Book Value	Stated Rate	Term	YTM	YTM 365
		Average Balance	0.00	Accrued Interest at Purchase		151,152.77	151,152.77		0		
				Subtotal		151,152.77	151,152.77				
		Total Cash and Investments	393,544,262.08		397,670,622.29	397,868,604.54	396,670,963.90		384	1.789	1.798

**Beaverton School District
Cash Activity Report for All Funds**

December 2019

	ENDING BALANCE 11/30/2019	CASH RECEIPTS	CASH DISBURSEMENTS	NET INVESTMENT TRANSFERS	ENDING BALANCE 12/31/2019
CASH PER BOOKS					
US Bank Checking	\$ 26,890,305	\$ 2,614,416	\$ (60,679,185)	\$ 47,273,505	\$ 16,099,042
Wells Fargo Checking	<u>\$ 688,648</u>	<u>631,180</u>	<u>(239,674)</u>	-	<u>1,080,153</u>
TOTAL CASH PER BOOKS	\$ 27,578,953	\$ 3,245,596	\$ (60,918,859)	\$ 47,273,505	\$ 17,179,195

	ENDING BALANCE 11/30/2019	INVESTMENT RECEIPTS	INVESTMENT PURCHASES	INVESTMENT MATURITIES / SALES	ENDING BALANCE 12/31/2019
INVESTMENTS					
Castle Oak	\$ 3,964,968	\$ -	\$ 58,118,911	\$ -	\$ 62,083,879
Wells Fargo	\$ 30,272,008	-	19,873,720	-	50,145,728
Piper Jaffray	\$ 151,997,718	-	86,733,864	-	238,731,582
USB Sweep	\$ 10,000,000	-	-	-	10,000,000
Oregon State LGIP	<u>\$ 176,061,343</u>	<u>71,497,280</u>	<u>-</u>	<u>(212,000,000)</u>	<u>35,558,623</u>
TOTAL INVESTMENTS	\$ 372,296,037	\$ 71,497,280	\$ 164,726,495	\$ (212,000,000)	\$ 396,519,812
TOTAL CASH & INVESTMENTS	<u>\$ 399,874,990</u>				<u>\$ 413,699,007</u>



Division 22 Compliance/Assurances

SITUATION:

Each year, districts must report compliance with all state standards set forth in OAR chapter 581, division 22 to the school board of the district in a public meeting by February 1 and to the Department of Education by February 15. The district must also post the report on compliance with state standards on the district's web page by February 1. For any rule for which the District is not in compliance, a plan of correction is developed.

Staff have conducted an internal audit of the District's compliance with Division 22 requirements and have determined that the District was not in compliance with 3 of the 52 Division 22 rules during the 2018-19 school year. The Division 22 Assurances Report to the Community identifies the areas of non-compliance and the actions identified by staff to bring the district into compliance by the beginning of the next school year. The Report to the Community is attached for Board review.

RECOMMENDATION:

It is recommended that the School Board review and discuss the Division 22 Assurances Report to the Community.

Division 22 Standards for Public Elementary and Secondary Schools 2018-19 Assurances: Report to the Community

By February 1 of each year, school district superintendents are required by [OAR 581-022-2305: Operating Policies and Procedures](#) to report to their communities the district's standing with respect to all of the Standards for Public Elementary and Secondary Schools as set out in Oregon Administrative Rules Chapter 581, Division 22. Below is a summary of Beaverton School District's compliance with each of the requirements of Oregon's administrative rules found in [DIVISION 22 - STANDARDS FOR PUBLIC ELEMENTARY AND SECONDARY SCHOOLS](#). For each rule reported as out of compliance, Beaverton School District has provided an explanation of why the school district was out of compliance and the school district's proposed corrective action plan to come into compliance by the beginning of the 2020-21 school year.

Summary of Compliance with Division 22 Requirements

[581-022-2000: Diploma Requirements](#)

Compliance Status for 2018-19 school year: In compliance

[581-022-2005: Veterans Diploma](#)

Compliance Status for 2018-19 school year: In compliance

[581-022-2010: Modified Diploma](#)

Compliance Status for 2018-19 school year: In compliance

[581-022-2015: Extended Diploma](#)

Compliance Status for 2018-19 school year: In compliance

[581-022-2020: Alternative Certificate](#)

Compliance Status for 2018-19 school year: In compliance

[581-022-2025: Credit Options](#)

Compliance Status for 2018-19 school year: In compliance

[581-022-2030: District Curriculum](#)

Compliance Status for 2018-19 school year: Out of Compliance

Explanation: The State Board of Education Adopted Social Studies Standards in May 2018. The District does not yet have curriculum and learning targets aligned to the new standards.

Proposed Corrective Action: To be addressed through the work of the Social Studies Project Team that will be charged by the School Board in the 2019-20 school year.

[581-022-2045: Prevention Education in Drugs and Alcohol](#)

Compliance Status for 2018-19 school year: Out of Compliance

Explanation: The district's comprehensive plan for alcohol and drug prevention:

- Does not ensure all students in grades 9-12 receive drug and alcohol prevention instruction annually
- Staff are not informed of the plan and their responsibilities

Proposed Corrective Action:

- For the students in grades 10 and 12 who are not currently receiving drug and alcohol instruction lessons will be designed and delivered through advisory classes.
- All staff with responsibilities for instruction will be informed of the plan and their responsibilities

[581-022-2050: Human Sexuality Education](#)

Compliance Status for 2018-19 school year: In compliance

[581-022-2055: Career Education](#)

Compliance Status for 2018-19 school year: In compliance

[581-022-2060: Comprehensive School Counseling](#)

Compliance Status for 2018-19 school year: In compliance

[581-022-2100: Administration of State Assessments](#)

Compliance Status for 2018-19 school year: In compliance

[581-022-2110: Exception of Students with Disabilities from State Assessments](#)

Compliance Status for 2018-19 school year: In compliance

[581-022-2115: Assessment of Essential Skills](#)

Compliance Status for 2018-19 school year: In compliance

[581-022-2120: Essential Skill Assessments for English Language Learners](#)

Compliance Status for 2018-19 school year: In compliance

[581-022-2130: Kindergarten Assessment](#)

Compliance Status for 2018-19 school year: In compliance

[581-022-2205: Policies on Reporting of Child Abuse](#)

Compliance Status for 2018-19 school year: **In compliance**

[581-022-2210: Anabolic Steroids and Performance Enhancing Substances](#)

Compliance Status for 2018-19 school year: **In compliance**

[581-022-2215: Safety of School Sports - Concussions](#)

Compliance Status for 2018-19 school year: **In compliance**

[581-022-2220: Health Services](#)

Compliance Status for 2018-19 school year: **In compliance**

[581-022-2223: Healthy and Safe Schools Plan](#)

Compliance Status for 2018-19 school year: **In compliance**

[581-022-2225: Emergency Plans and Safety Programs](#)

Compliance Status for 2018-19 school year: **In compliance**

[581-022-2230: Asbestos Management Plans](#)

Compliance Status for 2018-19 school year: **In compliance**

[581-022-2250: District Improvement Plan](#)

Compliance Status for 2018-19 school year: **In compliance**

[581-022-2255: School and District Performance Report Criteria](#)

Compliance Status for 2018-19 school year: **In compliance**

[581-022-2260: Records and Reports](#)

Compliance Status for 2018-19 school year: **In compliance**

[581-022-2265: Report on PE Data](#)

Compliance Status for 2018-19 school year: **In compliance**

[581-022-2270: Individual Student Assessment, Recordkeeping and Reporting](#)

Compliance Status for 2018-19 school year: **Out of Compliance**

Explanation: Student growth data is not provided to all teachers of ELA and math in grades 3-8 on their current students and on their prior students.

Proposed Corrective Action:

A Synergy report with student performance and growth data will be available to all teachers prior to the end of the 2019-20 school year.

[581-022-2300: Standardization](#)

Compliance Status for 2018-19 school year: **In compliance**

[581-022-2305: Operating Policies and Procedures](#)

Compliance Status for 2018-19 school year: **In compliance**

[581-022-2310: Equal Education Opportunities](#)

Compliance Status for 2018-19 school year: **In compliance**

[581-022-2315: Special Education for Children with Disabilities](#)

Compliance Status for 2018-19 school year: **In compliance**

[581-022-2320: Required Instructional Time](#)

Compliance Status for 2018-19 school year: **In compliance**

[581-022-2325: Identification of Academically Talented and Intellectually Gifted Students](#)

Compliance Status for 2018-19 school year: **In compliance**

[581-022-2330: Rights of Parents of TAG Students](#)

Compliance Status for 2018-19 school year: **In compliance**

[581-022-2335: Daily Class Size](#)

Compliance Status for 2018-19 school year: **In compliance**

[581-022-2340: Media Programs](#)

Compliance Status for 2018-19 school year: **In compliance**

[581-022-2345: Auxiliary Services](#)

Compliance Status for 2018-19 school year: **In compliance**

[581-022-2350: Independent Adoptions of Instructional Materials](#)

Compliance Status for 2018-19 school year: **In compliance**

[581-022-2355: Instructional Materials Adoption](#)

Compliance Status for 2018-19 school year: **In compliance**

[581-022-2360: Postponement of Purchase of State-Adopted Instructional Materials](#)

Compliance Status for 2018-19 school year: **In compliance**

[581-022-2370: Complaint Procedure](#)

Compliance Status for 2018-19 school year: **In compliance**

[581-022-2400: Personnel](#)

Compliance Status for 2018-19 school year: **In compliance**

[581-022-2405: Personnel Policies](#)

Compliance Status for 2018-19 school year: **In compliance**

[581-022-2410: Teacher and Administrator Evaluation and Support](#)

Compliance Status for 2018-19 school year: **In compliance**

[581-022-2415: Core Teaching Standards](#)

Compliance Status for 2018-19 school year: **In compliance**

[581-022-2420: Educational Leadership - Administrator Standards](#)

Compliance Status for 2018-19 school year: **In compliance**

[581-022-2430: Fingerprinting of Subject Individuals in Positions not Requiring Licensure as Teachers, Administrators, Personnel Specialists, School Nurses](#)

Compliance Status for 2018-19 school year: **In compliance**

[581-022-2440: Teacher Training Related to Dyslexia](#)

Compliance Status for 2018-19 school year: **In compliance**

[581-022-2445: Universal Screening for Risk Factors of Dyslexia](#)

Compliance Status for 2018-19 school year: **In compliance**

[581-022-2500: Programs and Services for TAG Students](#)

Compliance Status for 2018-19 school year: **In compliance**

[581-022-2505: Alternative Education Programs](#)

Compliance Status for 2018-19 school year: **In compliance**



**First Reading of School Board Policy
DBDB – Financial Reserves**

POLICY ISSUE/SITUATION:

Attached is policy DBDB – Financial Reserves, with School Board suggested changes for a first reading.

RECOMMENDATION:

It is recommended that the School Board review these changes.

Edits

Code DBDB

Readopted: 5/15/17

Adopted: 5/18/15

Orig. Code(s): DBA

Financial Reserves

The Board recognizes the importance of financial reserves to deliver sustainable and stable levels of instruction, staffing, number of instructional days and operation of facilities.

The reserves are necessary to:

1. Maintain financial stability for program continuity and public confidence;
2. Ensure budget and financial compliance with Oregon Revised Statutes and Oregon Administrative Rules;
3. Provide an emergency reserve to balance risk of availability and liquidity of resources in other funds as well as the potential drain upon general fund resources; liquidity; and designations. Such factors will be reviewed annually;
4. Protect the district from unnecessary borrowing in order to meet cash flow needs;
5. Provide prudent reserves to meet unexpected emergencies and protect against catastrophic events and accommodate volatile PERS rates;
6. Meet the uncertainties of state and federal funding; and
7. Help ensure a district credit rating that would qualify the district for lower interest costs and greater marketability of bonds that may be necessary in the construction and renovation of school facilities.

District reserves include both a sufficient general fund ending fund balance and a ~~rainy day~~ financial reserve.

General Fund Balance

The Board directs the superintendent to manage the adopted district budget in such a way as to ensure an ending general fund balance of at least five percent of total actual revenues.

~~Rainy Day~~ Financial Reserve

The Board also directs the superintendent to ~~develop a rainy day~~ maintain a financial reserve of five percent of the total resources of the general fund. ~~within three years of the effective date of this policy.~~

Use of Reserves

The Board may authorize use of the general fund balance to address unanticipated, nonrecurring needs and may authorize use of the rainy day reserve to address adverse ~~economic~~ conditions which negatively affect the district's revenues ~~and~~ or ability to meet the needs of students.

Replenishment of Reserves/Notice of Shortfall

In the event the Board authorizes use of reserves, the superintendent shall propose a plan for the replenishment of the reserves as soon as practicable, ~~within three years of use~~ considering state financial reserves and annually report progress against the plan. Prior to the reserves becoming less than projected, the superintendent will notify the Board of the possibility the reserves may fall below the minimum targeted level.

END OF POLICY

Legal Reference(s):

[ORS 294.311\(18\)](#)

[ORS 294.398](#)

[ORS 332.107](#)



FIRST READING OF SCHOOL BOARD POLICY DFA

POLICY ISSUE

Attached is the first reading of School Board policy DFA – Investment of Funds for re-adoption.

BACKGROUND INFORMATION

The primary objectives for this investment policy, in priority order, shall be preservation of capital, maintenance of a liquid position and maximum yield. The CFO shall annually review the investment policy and submit the policy and revisions to the OSTF if required. The policy and any revisions shall be presented annually to the board for re-adoption. There are no changes since the re-adoption on May 15, 2017.

RECOMMENDATION

It is recommended that the School Board review this policy.

District Goal: WE Empower all students to achieve post-high school success.

The District prohibits discrimination and harassment based on any basis protected by law, including but not limited to, an individual's actual or perceived race, color, religion, sex, sexual orientation, gender identity, gender expression, national or ethnic origin, marital status, age, mental or physical disability, pregnancy, familial status, economic status, veteran status, or because of a perceived or actual association with any other persons within these protected classes.

Investment of Funds

1. Scope and Pooling of Funds

This policy applies to the investment of short-term operating funds and capital project funds (including bond proceeds and bond reserve funds) held by the district. Investments of employees' retirement funds, deferred compensation plans, and funds held and invested by trustees, escrow agents or fiscal agents are not covered by this policy. This policy does not apply to the district's checking account.

Except where legally required to hold separate funds, the district will consolidate cash balances from all funds to maximize investment earnings. Investment income will be allocated to the various funds monthly based on their respective cash balances.

2. General Objectives

The primary objectives for this investment policy, in priority order, shall be: preservation of capital; maintenance of a liquid position; and maximum yield.

a. Safety

Safety of principal is the foremost objective of the investment program. Investment decisions shall be undertaken in a manner that seeks to ensure the preservation of capital in the overall portfolio. The objective will be to mitigate credit risk and interest rate risk.

- (1) Credit Risk: The district will minimize credit risk, the risk of loss due to the financial failure of the security issuer or backer, by:
 - (a) Limiting exposure to poor credits and concentrating the investments in the safest types of securities.
 - (b) Diversifying the investment portfolio so that potential losses on individual securities will be minimized.
 - (c) Monitoring the investment portfolio holdings for rating changes, changing economic/market conditions, etc.

- (2) Interest Rate Risk: The district will minimize the price risk, due to changes in general market interest rates, associated with the sale of securities prior to maturity, by:
 - (a) Structuring the investment portfolio so that securities mature to meet cash requirements for ongoing operations and/or capital projects, thereby avoiding the need to sell securities on the open market prior to maturity.
 - (b) Investing operating funds primarily in shorter-term securities or local government investment pool.

b. Liquidity

The investment portfolio shall remain sufficiently liquid to meet all operating, capital and construction requirements that may be reasonably anticipated. This is accomplished by structuring the portfolio so that securities mature concurrent with anticipated cash needs. In addition, a portion of the portfolio should also be placed in the Oregon Local Government Investment Pool (LGIP), or a similar investment vehicle, to provide immediately available funds.

c. Yield

The investment portfolio shall be designed with the objective of attaining a market rate of return throughout budgetary and economic cycles, taking into account the investment risk constraints and liquidity needs. Return on investment is of lesser importance compared to the safety and liquidity objectives described above. The portfolio investments are limited to highly rated/low risk securities in anticipation of earning a fair return relative to the risk being assumed.

Securities shall not be sold prior to maturity with the following exceptions:

- (1) A security with declining credit may be sold early to minimize loss of principal.
- (2) A security swap that would improve the quality, yield, or target duration in the portfolio.
- (3) Liquidity needs of the portfolio require that the security be sold.
- (4) To liquidate a security purchased in error that violates state law or this policy.

3. Standards of Care

a. Prudence

The standard of prudence to be used by investment officials shall be the “prudent person” standard and shall be applied in the context of managing an overall portfolio. Investment officers acting in accordance with written procedures and this investment policy and exercising due diligence shall be relieved of personal responsibility for an individual security’s credit risk or market price changes, provided deviations from expectations are reported to the School Board in a timely fashion, and the liquidation and/or sale of securities are carried out in accordance with the terms of this policy.

Investments shall be made with judgment and care, under circumstances then prevailing, which persons of prudence, discretion and intelligence exercise in the management of their own affairs, not for speculation, but for investment, considering the probable safety of their capital as well as the probable income to be derived.

b. Ethics and Conflicts of Interest

Officers and employees involved in the investment process shall refrain from personal business activity that could conflict with the proper execution and management of the investment program, or that could impair their ability to make impartial decisions. Employees, officers and their families shall not undertake personal investment transactions with the same individual with whom business is conducted on behalf of the district. Officers and employees shall, at all times, comply with the state of Oregon Government Ethics Commission set forth in Oregon Revised Statute (ORS) Chapter 244.

c. Delegation of Authority

The chief finance officer (CFO) shall manage the district’s investment program and ensure compliance with the investment policy, designate eligible investment institutions, review periodic investment reports and monitor investment transactions.

The CFO will designate the cash manager under his/her supervision to administer the policy, place investments, maintain accounting records and prepare investment reports.

4. Authorized Financial Dealers and Institutions

A list will be maintained of financial institutions authorized to provide investment and safekeeping services. In addition, a list will also be maintained of approved security broker/dealers selected by credit worthiness and other factors considered relevant by the district. These may include primary dealers or regional dealers that qualify under Securities and Exchange Commission (SEC) Rule 15C3-1 (uniform net capital rule).

Regional brokers and dealers must have an office in Pacific Northwest in order to be considered for doing business with the district. The district will limit all security purchases to institutions on the approved lists.

All financial institutions and broker/dealers who desire to become qualified for investment transactions must supply the following, as appropriate:

- a. Audited financial statements;
- b. Proof of National Association of Securities Dealers (NASD) certification;
- c. Proof of state registration;
- d. Completed broker/dealer questionnaire;
- e. Certification of having read and understood the district's investment policy;
- f. References from other Oregon local government clients.

A review of the financial condition and registration of qualified financial institutions and broker/dealers will be conducted by the CFO at least every five years. Additions and deletions to the list may be made at the discretion of the CFO.

5. Internal Controls

The CFO, in cooperation with the Financial Reporting staff and the external auditor, will establish and maintain an adequate internal control structure designed to reasonably protect the investments of the district from loss, theft or misuse. The concept of reasonable assurance recognizes that (1) the cost of a control should not exceed the benefits likely to be derived; and (2) the valuation of costs and benefits requires estimates and judgments by the CFO.

The district shall establish a process for an annual independent review by an external auditor to assure adequate internal controls, as well as compliance with policies and procedures. In addition, the internal controls may be tested by an external auditor upon any extraordinary event, such as turnover of key personnel.

6. Accounting Method

The district shall comply with all required legal provisions and Generally Accepted Accounting Principles (GAAP) relating to investment accounting. The accounting principles are those contained in the pronouncements of authoritative bodies including but not necessarily limited to, the Governmental Accounting Standards Board (GASB); the American Institute of Certified Public Accountants (AICPA); and the Financial Accounting Standards Board (FASB).

7. Delivery, Safekeeping and Collateral

- a. Delivery and Safekeeping

Prior to sending funds to a broker/dealer for an investment purchase, the cash manager will require a trade ticket listing the details of the transaction. Securities may be held by the broker/dealer in the district's name in the broker/dealer's account or they may be held by a third-party safekeeping agent.

The purchase and sale of securities, repurchase agreement and guaranteed investment contract transactions shall be settled on a delivery versus payment basis in accordance with Oregon Revised Statute (ORS) 294.145(4) and (5). It is the intent of the district that all purchased securities shall be perfected in the name of the district.

Sufficient evidence to title shall be consistent with modern investment and commercial practices.

b. Collateral

Cash management tools, defined as bank deposits, time deposits, certificates of deposit and savings accounts, shall be held in qualified Oregon depositories and collateralized in accordance with ORS Chapter 295.

ORS 294.035(3)(j) requires repurchase agreement collateral to be limited in maturity to three years and priced according to percentages prescribed by written policy of the Oregon Investment Council or the Oregon Short-Term Fund Board.

On March 12, 1996, the OSTF Board adopted the following margins:

- (1) U.S. Treasury securities: 102%;
- (2) U.S. Agency discount and coupon securities: 102%;
- (3) Mortgage backed securities, although allowed by ORS Chapter 294, are not allowed as repurchase agreement collateral under this policy.

A signed Master Repurchase Agreement must be in place between the district and the securities dealer, prior to entering into any repurchase agreement with that dealer.

At the minimum, the district will monitor the collateral requirements weekly for guaranteed investment contracts.

8. Authorized Investments

The following investments will be permitted by this policy and are authorized for investment under ORS 294.035, ORS 294.052 and 294.810:

- a. U.S. Treasury securities and other lawfully issued general obligations of the United States, including general obligations of agencies and instrumentalities of the United States or enterprises sponsored by the United States government;
- b. Debt of the agencies and instrumentalities of the states of Oregon, California, Idaho and Washington and their political subdivisions;
- c. Time deposit open accounts, certificates of deposit, bank deposit, and savings accounts;
- d. Bankers acceptances;
- e. Corporate indebtedness;
- f. Repurchase agreements;
- g. Oregon Short-Term Fund (OSTF) (also known as the Local Government Investment Pool – LGIP);

- h. For investment of bond proceeds only and with Board approval: various investment agreements that meet the requirements of ORS 294.052 and the collateral requirements; and restrictions of this policy.

9. Investment Parameters

- a. Diversification

The investments shall be diversified by:

- (1) Limiting investments to avoid over-concentration in securities from a specific issuer or business sector (excluding U.S. Treasury securities);
- (2) Investing in securities that have high credit quality;
- (3) Limiting investments in high interest rate risk, such as variable rate securities;
- (4) Investing in securities with varying maturities; and
- (5) Continuously investing a portion of the portfolio in readily available funds such as the Oregon Short-Term Fund (or LGIP).

Maximum Maturities and Percentage of Investments by Type

The maximum percentages for direct investments of surplus funds are as shown in the chart below. Surplus funds are defined as the sum of all investments, cash balances, deposit balances of all types and LGIP balances. The maximum maturity is measured from the settlement date of the investment transaction.

Capital project funds are funds specifically dedicated to capital projects, and will typically include proceeds from the district’s bond sales. All bond fund reserve requirements will be considered to be capital project funds. The district may designate (upon approval by the Board) other funds as capital project funds. Operating funds are all surplus funds that are not capital project funds.

Security	Maximum % of total Portfolio	Maximum Maturity
U.S. Treasury Bills, Notes and Bonds and obligations secured by the U.S. Treasury	100 percent	18 months for operating funds, and 3 years for capital project funds
U.S. Government Agencies and Instrumentalities, including Government Sponsored Enterprises	100 percent	18 months for operating funds, and 3 years for capital project funds
State and Local Government Securities	30 percent	18 months for operating funds, and 3 years for capital project funds
Time Certificates of Deposit	50 percent	18 months
Repurchase Agreements	25 percent	30 days
Banker’s Acceptances	25 percent	6 months
Corporate Indebtedness (commercial paper and bonds)	35 percent	18 months

OSTF - Local Government Investment Pool	Statutory Limit	N/A
Time Deposit Open Accounts, Bank Deposit and Savings Accounts	10 percent	N/A

In addition to the above, the district may invest up to 100 percent of the proceeds from any bond issue in investment agreements that meet the requirements of ORS 294.052 and the repurchase agreement collateral requirements and restrictions of this policy.

In order to achieve issuer diversification, this policy sets limits on the maximum holdings by issuer for certain investment types.

- (6) There shall be a limit of 35 percent of the portfolio held in securities issued by any single US government agency.
- (7) Time certificates of deposit and banker’s acceptances can all be issued by a single banking institution. In order to avoid over-concentration in a single banking institution, there shall be a limit of 10 percent for overall holdings of one institution.

In addition to this policy, ORS 294.035 limits investment in a single corporate entity to no more than 5 percent of total surplus funds.

Due to fluctuations in the aggregate surplus funds balance, maximum percentages for a particular issuer or investment type may be exceeded at a point in time subsequent to the purchase of a particular security. Securities need not be liquidated to realign the portfolio, but consideration should be given to this matter when future liquidations are made or when reinvestment occurs. Portfolio percentage limits are in place to ensure diversification in the investment portfolio; a small, temporary imbalance will not significantly impair that strategy.

b. Liquidity of Funds

Because of inherent difficulties in accurately forecasting cash flow requirements, a portion of the portfolio should be continuously invested in readily available funds, such as the OSTF or overnight repurchase agreements, or held in bank balances to ensure that appropriate liquidity is maintained to meet on-going obligations.

Maturity limitations will depend upon whether the funds being invested are considered short-term or long-term funds. All funds will be considered short-term except those reserved for capital projects. Except for special situations, as directed by the investment officer, investments will be limited to maturities not exceeding 18 months.

Short-term portfolio – Investment maturities for operating funds shall be scheduled to coincide with projected cash flow needs. In addition, the following maturity limits are designed to ensure liquidity in the portfolio:

Length of Maturity	Minimum % of Total Portfolio
Under 30 days	10 percent
Under 90 days	25 percent

Under 180 days	50 percent
Under 360 days	90 percent
Under 18 months	100 percent

If these maturity limits are inadvertently exceeded at the time of a specific investment, the purchase does not need to be liquidated. Future investments must not be made to longer maturity dates until the limits will be met, however.

Long-term portfolio – Instruments and diversification for the long-term portfolio shall be as for the short-term portfolio. Long-term portfolio is defined as “maturities over 18 months and maximum of 36 months”. Maturity scheduling shall be timed according to anticipated need. For example, investment of capital project funds shall be timed to meet projected contractor payments.

The investments of bond proceeds are restricted under bond covenants that may be more restrictive than the investment parameters included in this policy. Bond proceeds shall be invested in accordance with the most restrictive parameters of this policy and the applicable bond covenants and tax laws.

This investment policy has been submitted for review by the OSTF Board as specified above and in accordance with ORS 294.135(1)(a).

c. Credit Ratings

The minimum credit rating levels for the permissible investments are set out in ORS 294.035. These credit rating levels apply to the security at the transaction settlement date. If the credit rating of a security is subsequently downgraded below the minimum rating level for a new investment of that security, the CFO shall evaluate the downgrade on a case-by-case basis in order to determine if the security should be held or sold. The CFO will notify the School Board about the credit rating downgrade and whether the decision was made to sell or hold the security.

d. Securities Lending and Reverse Repurchase Agreements

The district will not lend securities nor directly participate in a securities lending or reverse repurchase program.

e. Competitively Priced Securities

Before any security purchase or sale is initiated, the cash manager shall gather information about current market interest rate levels from various sources, including investment dealers, internet financial websites, financial publications and other sources. Each security purchase shall be made at competitive market interest rate levels. The cash manager shall use their discretion in determining whether to seek competitive bids or offers.

10. Reporting

a. Methods

The cash manager shall prepare an investment report monthly including a management summary that provides an analysis of the status of the current investment portfolio and transactions made over the previous month. The report will be submitted to the CFO for review. This management summary will

be prepared in a manner that will allow the CFO to ascertain whether investment activities during the reporting period have conformed to the investment policy. In addition, the cash manager will prepare a regular monthly board report. At a minimum, this report will include the following:

- (1) Listing of individual securities held at the end of the reporting period;
- (2) Average weighted yield to maturity of portfolio on investments as compared to applicable benchmark(s);
- (3) Listing of investments by maturity date, call date, cost and current fair value;
- (4) Percentage of the total portfolio that each type of investment represents along with the percentages authorized in this policy.

b. Performance Standards

The investment portfolio will be managed in accordance with the parameters specified within this policy. The appropriate benchmark will be the monthly yield for the LGIP. Because bond proceeds are expected to be invested at the time they are received, and are therefore invested in an interest rate environment that exists at that point in time, that portion of the portfolio will be excluded from ongoing benchmark performance measurement.

c. Marking to Market

The market value of the portfolio shall be calculated at least annually and a statement of the market value of the portfolio shall be issued at fiscal year-end.

11. Policy Adoption and Re-Adoption

The CFO shall annually review the investment policy and submit the policy and revisions to the OSTF if required. The policy and any revisions shall be presented annually to the Board. The Board will approve all revisions to the policy.

END OF POLICY

Legal Reference(s):

[ORS 294.033](#)

[ORS 294.035](#)

[ORS 294.125](#)

[ORS 294.135](#)

[ORS 294.145](#)

[ORS 294.155](#)



First Reading of School Administrative Regulations (AR's)

POLICY ISSUE/SITUATION:

The following is a list of AR's that are being presented for a first reading. These AR's are required to be Board adopted.

- IGBA-AR – Special Education – Participation in Regular Education Programs** *(edits)*
- IGBAE-AR – Special Education – Participation in Regular Education Programs** *(edits)*
- IGBAF-AR – Special Education – Individualized Education Program (IEP)** *(proposed new OSBA language)*
- IGBAG-AR – Special Education – Procedural Safeguards** *(edits)*
- IGBAH-AR – Special Education – Evaluation and Eligibility Procedures** *(proposed new OSBA language)*
- IGBAI-AR – Special Education – Private schools *(proposed new OSBA language)*
- IGBAJ-AR – Special Education – Free Appropriate Public Education (FAPE)II *(edits)*
- IGBAL-AR – Special Education – Services for Home-Schooled Students with Disabilities** *(edits)*

RECOMMENDATION:

It is recommended that the School Board review these Administrative Regulation changes.

Proposed OSBA Language

Code: IGBA-AR

Revised/Readopted: 3/7/06, 4/1/00

Students with Disabilities - Child Identification Procedures**

1. The district's Child Find efforts include:
 - a. Public awareness. District child find activities involve local media resources and direct contact activities, such as presentations at community meetings, business group meetings, services agencies or advocacy organizations.
 - (1) The district provides information about special education services in the district and the district's special education referral process to public and private facilities and public charter schools located in the district, including day care centers, homeless shelters, group homes, county jails, hospitals, medical officer and other facilities that serve children birth to 21 years old.
 - (2) The district provides information about special education services and how to make a referral to any migrant education programs operating in the district.
 - b. Notice of confidentiality. Before any major child find activity, the district publishes notice in newspapers or other media, or both, informing parents that confidentiality requirements apply to these activities. Circulation for this notice must be adequate to inform parents within the district's jurisdiction.
 - c. Staff awareness. The district ensures that staff are knowledgeable of the characteristics of disabilities and the referral procedures for students, including preschool children, suspected of having disabilities.
 - d. Communication to parents. District staff shall inform parents about the availability of special education services in the district and provide them with information about initiating referral for special education evaluation, including the information about early intervention/early childhood special education services (EI/ECSE) and the designated referral and evaluation agencies with which the district collaborates.
2. Private School Children with Disabilities
 - a. The district's child find system applies to children, including those children who are residents of another state, that are enrolled by their parents in private schools located within the boundaries of the district.
 - b. The district's child find activities for private school students enrolled by their parents in private schools are similar to, and completed within a comparable time period, as child find activities for students in district public schools.
 - c. The district does not include the cost of conducting child find activities for private school students, including individual evaluations, in determining whether it has spent a proportionate share of its federal Individuals with Disabilities Education Act (IDEA) funds on parentally- placed school students with disabilities.

- d. The district consults with private school representatives and parents of private school students with disabilities about how to carry out these child find activities, including:
 - (1) How private school children suspected of having a disability can participate equitably; and
 - (2) How parents, teachers and private school officials will be informed of the process.
- e. The district child find process for parentally-placed private school students ensures the equitable participation of parentally-placed private school students with disabilities and an accurate count of such children.

3. Home-Schooled Students with Disabilities

- a. The district collaborates with the education service district that serves the district to ensure that the district responds promptly to information about home-schooled students with suspected disabilities.
- b. The district collaborates with home schooling organizations in the district's jurisdiction and provides information about special education services in the district and how to make a referral.
- c. If the district has reason to suspect that a home-schooled student has a disability, the district will obtain parent consent for initial evaluation.

DELETE

Code: IGBA-AR
Readopted: 2/28/08
Adopted: 11/3/81
Orig. Code(s): 6000-33

Students with Disabilities - Find Procedures

1. General Child Find

- a. The district uses an ongoing system to locate, identify and evaluate all children birth to 21 residing in the district including children with disabilities who are homeless, wards of the state and children attending private schools, suspected of being eligible for special education unless these children are no longer entitled to a free appropriate public education under OAR 581-015-0600 to -0602. This ongoing system includes:
 - (1) Public awareness activities (using local media resources such as television, radio, internet and newspaper; direct contact activities in the community, including presentations at community meetings, business group meetings and other meetings; outreach to those who may not understand English or who may live in rural or isolated areas).
 - (2) A system in each school, public charter school and public alternative school in the district to ensure that:
 - (a) District staff are knowledgeable of the characteristics of disabilities and appropriate referral of students suspected of having disabilities; and
 - (b) Special education referrals from parents, teachers and others, including state agencies, are directed to appropriate special education staff.

2. Private School Children with Disabilities

- a. The district's child find activities for students in private schools are comparable to activities for students in the district's public schools, including the time period in which the child find process shall be completed.
- b. The district conducts timely and meaningful consultation with appropriate representatives of private schools and parents of private school children with disabilities on how to carry out these child find activities and how parents, teachers, and private school officials will be informed of the process.
- c. The district child find process includes all students in private schools, even those who are residents of another school district.

3. Home-Schooled Students with Disabilities

- a. The district collaborates with the ESD that serves the district to ensure that the district responds promptly to information about home-schooled students with suspected disabilities.

- b. If the district suspects that a home-schooled student has a disability, the district contacts the parent to determine the needs for evaluation and obtain informed parental consent.

w/edits

Code: IGBAE-AR

Revised/Readopted: 3/7/06

Adopted: 4/1/00

Special Education - Participation in Regular Education Programs

1. Placement of the Student
 - a. The placement decision for each eligible student is:
 - (1) Made by a group of persons, including the parent/guardian, and other persons knowledgeable about the student, the meaning of the evaluation data and the placement options;
 - (2) Made in conformity with the requirements of least restrictive environment;
 - (3) Determined at least annually;
 - (4) Based on the student's individualized education program (IEP); and
 - (5) The student is educated in the school that he/she would attend if nondisabled unless the child's IEP requires some other arrangement or as close as possible to the student's home if the school the student would attend if they were non-disabled if placement is determined to be elsewhere in the district.
 - b. The district ensures that:
 - (1) A continuum of placement options is available to meet the needs of students with disabilities for special education and related services and to the extent necessary to implement the ~~individualized education program~~ IEP for each student with a disability;
 - (2) The continuum of placement options includes instruction in regular classes (with special education and related services and/or supplementary aids and services as identified on the IEP), special classes, special schools, home instruction and instruction in hospitals and institutions.
 - (3) Placement options, including instruction in regular classes, special classes, special schools, home instruction and instruction in hospitals and institutions are available to the extent necessary to implement the IEP for each student with a disability.
 - c. Placement decisions must be made in conformity with the least restrictive environment (LRE) provisions. These provisions direct that to the maximum extent appropriate, students with disabilities be educated with students who are nondisabled, and that special classes, separate schooling or other removal of students with disabilities from the regular education environment occurs only if the nature or severity of the disability is such that education in regular classes with the use of supplementary aids and services cannot be achieved satisfactorily. In selecting the least restrictive environment, consideration is given to any potential harmful effect on the child or on the quality of services which he or she needs. Placement must be made in the school that the student would attend if not disabled unless unique circumstances prevent this placement or the student's IEP requires some other arrangement. A student with a disability cannot be removed from education in age-appropriate regular classrooms solely because of the needed modifications in the general education curriculum.
 - d. Placement teams, including the parent, select the least restrictive environment for each student using the following process: ~~will also be used to determine and document placement:~~
 - (1) Complete the IEP, including determining the student's special education and related service, and determining the extent to which these services can be provided to the student in the regular class.

- (2) Document the names of each participant in the placement meeting. The parent/guardian of a child with a disability and the district may agree to use alternative means of meeting participation, such as video conferencing and conference calls;
- (3) The Placement Team reviews current evaluation information. Any evaluation information used in determining IEP placement should be identified;
- (4) After reviewing the IEP and evaluation data:
 - a. Identify each placement option considered. (If the Placement Team is documenting that a regular classroom placement is appropriate to implement the services identified on the IEP, the Team may, but is not required to consider additional placement options that would be considered more restrictive unless the parent/guardian requests a more restrictive placement.)
 - b. For each of the placement options considered, describe:
 - (i) The benefits of this placement;
 - (ii) The possible harmful effects on the child and/or on the services in this placement option;
 - (iii) The modifications/services that were considered to reduce the potential harmful effects.
- (5) Document which placement option is selected.
- (6) ~~Document the names of the of the team members involved in the placement decision.~~
- (7) Provide parents/guardian with a copy of the IEP and placement determination.
- (8) Provide applicable prior written notice and consent.
 - (a) All initial placements require Prior Written Notice and Consent
 - (b) Any subsequent changes in placement require Prior Written Notice. The team may provide this notice by using a Prior Notice of Special Education Action.
 - (c) The district must also provide prior written notice of refusal if the parent/guardian requests a placement that the team refuses.

2. Youth Incarcerated in Adult Correctional Facilities

- a. ~~For students otherwise entitled to free appropriate public education FAPE, the placement team may modify the student's placement if the state has demonstrated a bona fide security or compelling penological interest that cannot be otherwise accommodated. The requirements related to least restrictive environments do not apply with respect to these modifications.~~

3. Nonacademic Settings

- a. The district takes steps, including providing the supplementary aids and services determined appropriate and necessary by the student's IEP team, to provide nonacademic and extracurricular services and activities in the manner necessary to afford students with disabilities an equal opportunity for participation in those services and activities.
- b. Nonacademic and extracurricular services and activities include all those available to nondisabled students and may include:
 - (1) Counseling services;
 - (2) Athletics;
 - (3) Transportation;
 - (4) Health services;
 - (5) Recreational activities;
 - (6) Special interest groups or clubs sponsored by the district;
 - (7) Referrals to agencies that provide assistance to individuals with disabilities; and
 - (8) Employment of students.

PROPOSED

Code: **IGBAF-AR**

Revised/Readopted: 3/4/08, 4/11/06

Special Education - Individualized Education Program (IEP)**

1. General IEP Information

- a. The district ensures that an IEP is in effect for each eligible student:
 - (1) Before special education and related services are provided to a student;
 - (2) At the beginning of each school year for each student with a disability for whom the district is responsible; and
 - (3) Before the district implements all the special education and related services, including program modifications, supports and/or supplementary aids and services, as identified on the IEP.
- b. The district uses:
 - (1) The Oregon standard IEP; or
 - (2) An IEP form that has been approved by the Oregon Department of Education.
- c. The district develops and implements all provisions of the IEP as soon as possible following the IEP meeting.
- d. The IEP will be accessible to each of the student's regular education teacher(s), the student's special education teacher(s) and the student's related services provider(s) and other service provider(s).
- e. The district takes steps to ensure that parent(s)
- f. The district ensures that each teacher and service provider is informed of:
 - (1) Their specific responsibilities for implementing the IEP specific accommodations, modifications and/or supports that must be provided for, or on behalf of the student; and
 - (2) Their responsibility to fully implement the IEP including any amendments the district and parents

The district takes whatever action is necessary to ensure that parents understand the proceedings of the IEP team meeting, including arranging for an interpreter for parents with deafness or whose native language is other than English.

- g. The district provides a copy of the IEP to the parents at no cost.

2. IEP Meetings

- a. The district conducts IEP meetings within 30 calendar days of the determination that the student is eligible for special education and related services.
- b. The district convenes IEP meetings for each eligible student periodically, but not less than once per year.
- c. At IEP meetings, the team reviews and revises the IEP to address any lack of expected progress toward annual goals and in the general curriculum, new evaluation data or new information from the parent(s), the student's anticipated needs, or the need to address other matters.
- d. Between annual IEP meetings, the district and the parent(s) may amend or modify the student's current IEP without convening an IEP team meeting using the procedures in the Agreement to Amend or Modify IEP subsection.
- e. When the parent(s) requests a meeting, the district will either schedule a meeting within a reasonable time or provide timely written prior notice of the district's refusal to hold a meeting.
- f. If an agency other than the district fails to provide agreed upon transition services contained in the IEP, the district convenes an IEP meeting to plan alternative strategies to meet the transition objectives and, if necessary, to revise the IEP.

3. IEP Team Members

- a. The district's IEP team members include the following:
 - (1) The student's parent(s);
 - (2) The student, if the purpose of the IEP meeting is to consider the student's postsecondary goals and transition services (beginning for IEPs in effect at age 16), or for younger students, when appropriate;
 - (3) At least one of the student's special education teachers or, if appropriate, at least one of the student's special education providers;
 - (4) At least one of the student's regular education teachers if the student is or may be participating in the regular education environment. If the student has more than one regular education teacher, the district will determine which teacher or teachers will participate;
 - (5) A representative of the district (who may also be another member of the team) who is qualified to provide or supervise the provision of special education and is knowledgeable about district resources. The representative of the district will have the authority to commit district resources and be able to ensure that all services identified in the IEP can be delivered;
 - (6) An individual, who may also be another member of the team, who can interpret the instructional implications of the evaluation results; and
 - (7) At the discretion of the parent or district, other persons who have knowledge or special expertise regarding the student.

- b. Student participation:
 - (1) Whenever appropriate, the student with a disability is a member of the team.
 - (2) If the purpose of the IEP meeting includes consideration of postsecondary goals and transition services for the student, the district includes the student in the IEP team meeting.
 - (3) If the purpose of the IEP meeting includes consideration of postsecondary goals and transition services for the student, and the student does not attend the meeting, the district will take other steps to consider the student's preferences and interests in developing the IEP.
 - c. Participation by other agencies:
 - (1) With parent or adult student written consent, and where appropriate, the district invites a representative of any other agency that is likely to be responsible for providing or paying for transition services if the purpose of the IEP meeting includes the consideration of transition services (beginning at age 16, or younger if appropriate); and
 - (2) If the district refers or places a student in an education service district, state-operated program, private school or other educational program, IEP team membership includes a representative from the appropriate agencies. Participation may consist of attending the meeting, conference call or participating through other means.
4. Agreement for Nonattendance and Excusal
- a. The district and the parent may consent to excuse an IEP team member from attending an IEP meeting, in whole or in part, when the meeting involves a discussion or modification of team member's area of curriculum or service. The district designates specific individuals to authorize excusal of IEP team members.
 - b. If excusing an IEP team member whose area is to be discussed at an IEP meeting, the district ensures:
 - (1) The parent and the district consent in writing to the excusal;
 - (2) The team member submits written input to the parents and other members of the IEP
 - (3) The parent is informed of all information related to the excusal in the parent's native language or other mode of communication according to consent requirements.
5. IEP Content
- a. In developing the IEP, the district considers the student's strengths, the parent's concerns, the results of the initial or most recent evaluation, and the academic, developmental and functional needs of the student.
 - b. The district ensures that IEPs for each eligible student includes:
 - (1) A statement of the student's present levels of academic achievement and functional performance that:

- (a) Includes a description of how the disability affects the progress and involvement in the general education curriculum;
 - (b) Describes the results of any evaluations conducted, including functional and developmental information;
 - (c) Is written in language that is understood by all IEP team members, including parents;
 - (d) Is clearly linked to each annual goal statement;
 - (e) Includes a description of benchmarks or short term objectives for children with disabilities who take alternative assessments aligned to alternate achievement standards.
- (2) A statement of measurable annual goals, including academic and functional goals, or for students whose performance is measured by alternate assessments aligned to alternate achievement standard, statements of measurable goals and short term objectives. The goals and, if appropriate, objectives:
- (a) Meet the student’s needs that are present because of the disability, or because of behavior that interferes with the student’s ability to learn, or impedes the learning of other students;
 - (b) Enable the student to be involved in and progress in the general curriculum, as appropriate; and
 - (c) Clearly describe the anticipated outcomes, including intermediate steps, if appropriate, that serve as a measure of progress toward the goal.
- (3) A statement of the special education services, related services, supplementary aids and services that the district provides to the student:
- (a) The district bases special education and related services, modifications and supports on peer-reviewed research to the extent practicable to assist students in advancing toward goals, progressing in the general curriculum and participating with other students (including those without disabilities), in academic, nonacademic and extracurricular activities.
 - (b) Each statement of special education services, related or supplementary services, aids, modifications or supports includes a description of the inclusive dates, amount or frequency, location and who is responsible for implementation.
- (4) A statement of the extent, if any, to which the student will not participate with nondisabled students in regular academic, nonacademic and extracurricular activities.
- (5) A statement of any individual modifications and accommodations in the administration of state or districtwide assessments of student achievement.
- (a) A student will not be exempt from participation in state or districtwide assessment because of a disability unless the parent requests an exemption;
 - (b) If the IEP team determines that the student will take the alternate assessment instead of the regular statewide or a districtwide assessment, a statement of why the student cannot participate in the regular assessment and why the alternate assessment is appropriate for the student.

- (6) A statement describing how the district will measure student's progress toward completion of the annual goals and when periodic reports on the student's progress toward the annual goals will be provided.

6. Agreement to Amend or Modify IEP

Between annual IEP meetings, the district and the parent may agree to make changes in the student's current IEP without holding an IEP meeting. These changes require a signed, written agreement between the district and the parent.

- a. The district and the parent record any amendments, revisions or modifications on the student's current IEP. If additional IEP pages are required these pages must be attached to the existing IEP.
- b. The district files a complete copy of the IEP with the student's education records and informs the student's IEP team and any teachers or service providers of the changes.
- c. The district provides the parent prior written notice of any changes in the IEP and upon request, provides the parent with a revised copy of the IEP with the changes incorporated.

7. IEP Team Considerations and Special Factors

- a. In developing, reviewing and revising the IEP, the IEP team considers:
 - (1) The strengths of the student and concerns of the parent for enhancing the education of the student;
 - (2) The results of the initial or most recent evaluation of the student;
 - (3) As appropriate, the results of the student's performance on any general state or districtwide assessments;
 - (4) The academic, developmental and functional needs of the child.
- b. In developing, reviewing and revising the student's IEP, the IEP team considers the following special factors:
 - (1) The communication needs of the student; and
 - (2) The need for assistive technology services and/or devices.
- c. As appropriate, the IEP team also considers the following special factors:
 - (1) For a student whose behavior impedes his or her learning or that of others, strategies, positive behavioral intervention and supports to address that behavior;
 - (2) For a student with limited English proficiency, the language needs of the student as those needs relate to the IEP;
 - (3) For a student who is blind or visually impaired, instruction in Braille and the use of Braille unless the IEP team determines (after an evaluation of reading and writing skills, needs and media, including evaluation of future needs for instruction in Braille or the use of Braille, appropriate reading and writing), that instruction in Braille or the use of Braille is not appropriate;

- (4) For a student who is deaf or hard of hearing, the student's language and communication needs, including opportunities for direct communication with peers and professional personnel in the student's language and communication mode, academic level and full range of needs, including opportunities for direct instruction in the student's language and communication mode; and
 - (5) A statement of any device or service needed for the student to receive a free appropriate public education (FAPE).
- d. In addition to the above IEP contents, the IEP for each eligible student of transition age includes:
- (1) Beginning not later than the IEP in effect when the student turns 16, or younger if determined appropriate by the IEP team, and updated annually thereafter, the IEP must include:
 - (a) Appropriate measurable postsecondary goals based upon age appropriate transition assessments related to training education, employment, and where appropriate, independent living skills; and
 - (b) The transition services (including courses of study) needed to assist the student in reaching those goals.
 - (2) At least one year before a student reaches the age of majority (student reaches the age of 18, or has married or been emancipated, whichever occurs first), a statement that the district has informed the student that all procedural rights will transfer at the age of majority; and
 - (3) If identified transition service providers, other than the district, fail to provide any of the services identified on the IEP, the district will initiate an IEP meeting as soon as possible to address alternative strategies and revise the IEP if necessary.

8. Incarcerated Youth

- a. For students with disabilities who are convicted as adults, incarcerated in adult correctional facilities and otherwise entitled to FAPE, the following IEP requirements do not apply:
 - (1) Participation of students with disabilities in state and districtwide assessment; and
 - (2) Transition planning and transition services, for students whose eligibility will end because of their age before they will be eligible to be released from an adult correctional facility based on consideration of their sentence and eligibility for early release.
- b. The IEP team may modify the student's IEP, if the state has demonstrated a bona fide security or other compelling interest that cannot be otherwise accommodated.

9. Extended School Year Services

- a. The district makes extended school year (ESY) services available to all students for whom the IEP team has determined that such services are necessary to provide FAPE.
- b. ESY services are:
 - (1) Provided to a student with a disability in addition to the services provided during the typical school year;
 - (2) Identified in the student's IEP; and
 - (3) Provided at no cost to the parent.
- c. The district does not limit consideration of ESY services to particular categories of disability or unilaterally limit the type, amount or duration of service.
- d. The district provides ESY services to maintain the student's skills or behavior, but not to teach new skills or behaviors.
- e. The district's criteria for determining the need for extended school year services include:
 - (1) Regression (a significant loss of skills or behaviors) and recoupment time based on documented evidence; or
 - (2) If no documented evidence, on predictions according to the professional judgment of the team.
- f. "Regression" means significant loss of skills or behaviors in any area specified on the IEP as a result of an interruption in education services.
- g. "Recoupment" means the recovery of skills or behaviors specified on the IEP to a level demonstrated before the interruption of education services.

10. Assistive Technology

- a. The district ensures that assistive technology devices or assistive technology services, or both, are made available if they are identified as part of the student's IEP. These services and/or devices may be part of the student's special education, related services or supplementary aids and services.
- b. On a case-by-case basis, the district permits the use of district-purchased assistive technology devices in the student's home or in other settings if the student's IEP team determines that the student needs access to those devices to receive a free appropriate public education. In these situations, district policy will govern liability and transfer of the device when the student ceases to attend the district.

11. Transfer Students

- a. In state:

If a student with a disability (who had an IEP that was in effect in a previous district in Oregon) transfers into the district and enrolls in a district school within the same school year, the district (in consultation with the student's parents) provides a free

appropriate public education to the student (including services comparable to those described in the student's IEP from the previous district), until the district either:

- (1) Adopts the student's IEP from the previous district; or
- (2) Develops, adopts and implements a new IEP for the student in accordance with all of the IEP provisions.

b. Out of state:

If a student transfers into the district with a current IEP from a district in another state, the district, in consultation with the student's parents, will provide a free appropriate public

district, until the district:

- (1) Conducts an initial evaluation (if determined necessary by the district to determine Oregon eligibility) with parent consent and determines whether the student meets eligibility criteria described in Oregon Administrative Rules.
- (2) If the student is eligible under Oregon criteria, the district develops, adopts and implements a new IEP for the student using the Oregon Standard IEP or an approved alternate IEP.
- (3) If the student does not meet Oregon eligibility criteria, the district provides prior written notice to

DELETE

Code: **IGBAF-AR**

Revised/Readopted: 3/4/08, 4/11/06, 4/1/00

Special Education - Individualized Education Program (IEP)

1. General IEP Information

- a. An IEP is in effect for each eligible student:
 - (1) Before special education and related services are provided to a student; and
 - (2) At the beginning of each school year.
- b. The District uses:
 - (1) The Oregon standard IEP; or
 - (2) An IEP form that has been approved by the Oregon Department of Education.
- c. An IEP is implemented as soon as possible following the IEP meeting.
- d. The District provides all the special education and related services, including program modifications, supports and/or supplementary aids and services, identified on the IEP.
- e. The District makes a good faith effort to assist the student to achieve the annual goals and short-term objectives identified on the IEP. The District will not be held accountable if, despite good faith implementation, a student does not achieve the anticipated progress identified on the IEP.
- f. The IEP will be accessible to each of:
 - (1) The student's regular education teacher(s);
 - (2) The student's special education teacher(s); and
 - (3) The student's related services provider(s) and other service provider(s).
- g. The District ensures that each teacher and service provider is informed of:
 - (1) Their specific responsibilities for implementing the IEP specific accommodations, modifications and/or supports that must be provided for, or on behalf of the student; and
 - (2) Their responsibility to fully implement the IEP.

2. IEP Meetings

- a. The District initiates and conducts IEP meetings at least annually (every 365 days) for the purpose of developing, reviewing and revising an eligible student's IEP.
- b. IEP meetings are conducted within 30 calendar days of determination that the student needs special education and related services.
- c. Each eligible student's IEP is reviewed at least once a year to determine whether annual goals

for the student are being achieved, and to make necessary revisions to address:

- (1) Any lack of anticipated progress toward annual goals and in the general education curriculum, where appropriate;
 - (2) Results of any reevaluation;
 - (3) Information provided about the student provided to, or by, the parent/guardian;
 - (4) The student's anticipated needs; and
 - (5) Other matters.
- d. The District conducts an IEP meeting any time it believes that a change in the IEP may be necessary to ensure free appropriate public education (FAPE) to the student.
- e. A parent/guardian may request a meeting at any time to review or revise the IEP if they believe that the District has not acted in good faith in developing or implementing the IEP, if they believe that IEP is not effective or for any other reason for which a review would be appropriate.
- f. When the parent/guardian requests a meeting the District will either:
- (1) Schedule a meeting within a reasonable time; or
 - (2) Provide written prior notice of the District's refusal to hold a meeting.
- g. If a participating agency fails to provide agreed upon transition services contained in the IEP, an IEP meeting is initiated for the purpose of identifying alternative strategies to meet the transition objectives and, if necessary, revising the IEP.
- h. The District provides prior written notice to the parent/guardian upon completion of the IEP, and before implementation of IEP services, if:
- (1) The IEP changes the provision of FAPE to the student (e.g., adding or discontinuing a special education or related service); or
 - (2) The IEP team refuses a parent/guardian request for a change in the provision of FAPE to the student.

3. IEP Team Members

- a. IEP team members include the following:
- (1) One or both of the student's parent/guardian;
 - (2) At least one of the student's special education teachers or special education service providers;
 - (3) At least one of the student's regular education teachers if the student is or may be participating in the regular education environment;
 - (4) A representative of the District, who may also be another member of the team, who is qualified to provide or supervise the provision of special education and is knowledgeable about the general curriculum, and about program options, academic, nonacademic and extracurricular activities. A representative of the District will have the authority to commit District resources, and be able to ensure that all services identified in the IEP can be delivered;
 - (5) An individual, who may also be another member of the team, who is knowledgeable about the student's disability, and who can interpret the instructional implications of the evaluation results;

- (6) At the discretion of the parent/guardian or District, other individuals, including related services personnel, as appropriate, who have knowledge or special expertise regarding the student;
- (7) The student when appropriate. The student is a required IEP team member beginning with the first IEP in effect when the student turns 16. The student must have the opportunity to indicate his/her preferences and interests during the IEP meeting when transition services are being considered. If the student does not attend the IEP meetings when transition services are being discussed, the District must take steps to ensure the student's interests and preferences are being considered;
- (8) For students of transition age, a representative of any other agency that is likely to be responsible for providing or paying for transition services. If an agency does not send a representative to the meeting, the District must take other steps to obtain the participation of the agency in the planning of any transition services; and
- (9) If the District has referred or placed a student in an ESD, state-operated program, private facility or any other program, IEP team membership will include a representative from those agencies. Participation may consist of attending the meeting, conference call or participating through other means.

b. Participation of the regular education teacher:

- (1) If the student is, or may be, participating in the regular educational environment, the regular education teacher will, to the extent appropriate, participate in the development and review of the IEP. If the student has more than one regular education teacher, the District will determine which teacher or teachers will participate. The regular education teacher(s) will participate in discussions and decisions regarding:
 - (a) Participation in the general curriculum and in the regular education environment;
 - (b) Supplemental aids and services, program modifications and/or supports to be provided for the student or on behalf of the student;
 - (c) Appropriate positive behavioral interventions and strategies; and
 - (d) All portions of the IEP they may be implementing.

c. Attendance and Excusal

- (1) A member of the IEP team is not required to attend the IEP meeting, in whole or in part, if the parent/guardian of a child with a disability and the District agree that the attendance of such a member is not necessary because the member's area of the curriculum or related services is not being modified or discussed at the meeting. The District must separately document this agreement in writing, retain the written submission in the student's education records, and the student's IEP should reflect no changes to that area of curriculum or related service.
- (2) A member of the IEP team may be excused from attending the IEP meeting, in whole or in part, when the meeting involves a modification to or discussion of the members' area of the curriculum or related services if the parent/guardian and the school District consent to the excusal, and the member submits in writing to the parent/guardian and to the IEP team input into the development of the IEP before the meeting. The District must, separately document this agreement, and retain the written submission in the student's education records.
- (3) The District representative is not excused under these provisions.

d. Alternate Means of Participation

- (1) When conducting IEP team meetings, the parent/guardian of the child with a disability and the school District may agree to use alternate means of meeting participation, such as video conferencing and conference calls.

4. Content of the IEP

a. The IEP for each eligible student includes:

- (1) A written statement of the student's present levels of academic achievement and functional performance. The statement:
 - (a) Includes a description of how the disability affects the progress and involvement in the general education curriculum;
 - (b) Describes the results of any evaluations conducted, including functional and developmental information;
 - (c) Is written in language that is understood by all IEP team members, including the parent/guardian; and
 - (d) Is clearly linked to the annual goal statement(s).
- (2) A statement of measurable annual goals, including academic and functional goals and for students with disabilities who take alternate assessments aligned to alternate achievement standards, a description of short-term objectives designed to:
 - (a) Meet the student's needs that result from the disability to enable the student to be involved in and progress in the general education curriculum, as appropriate; and
 - (b) Meet each of the student's other educational needs that result from the disability.
- (3) A description of how the student's progress toward meeting each annual goal will be measured and when periodic reports on the progress the student is making toward meeting each annual goals will be provided.
- (4) A statement of the special education services, related services, supplementary aids and services based on peer-reviewed research to the extent practicable, program modifications and supports for school personnel that will be provided to the student, or on behalf of the student. These services, modifications and supports are developed for the student to:
 - (a) Meet the annual goals;
 - (b) Be involved and progress in the general education curriculum;
 - (c) Be involved and participate in extracurricular and other nonacademic activities; and
 - (d) Be educated and participate with other students, with and without disabilities, in academic, nonacademic and extracurricular activities.
- (5) For each special education service, related service, supplementary aid and service, program modification and support for school personnel that will be provided to the student, or on behalf of the student, a description of:

- (a) The projected date for initiation;
 - (b) Projected duration, or ending date;
 - (c) The anticipated amount and frequency;
 - (d) Who is responsible for implementation and
 - (e) The anticipated location.
- (6) A statement explaining the extent, if any, to which the student will not participate:
- (a) With non-disabled students in the regular academic class; and
 - (b) In nonacademic and extracurricular activities.
- (7) A statement of any individual appropriate accommodations that are necessary to measure the academic achievement and functional performance of the student on state and district wide assessments of student achievement that are needed for the student to participate in that assessment;
- (8) A student shall not be exempt from participation in state or districtwide assessment, including extended and juried assessments, because of a disability, unless the parent/guardian requested an exemption under OAR 581-022-0612;
- (9) If the team determines that a student will not participate in a general statewide and/or districtwide assessment of student achievement (or part of an assessment), a statement of why that assessment is not appropriate for the student and how the student will be assessed;
- (10) A statement of why the student cannot participate in the regular assessment and why the alternate is appropriate if the team determines that the student shall take an alternate assessment.

5. IEP Team Considerations and Special Factors

- a. In developing, reviewing and revising the IEP, the IEP team considers:
 - (1) The strengths of the student and concerns of the parent/guardian for enhancing the education of the student;
 - (2) The results of the initial or most recent evaluation of the student; and
 - (3) As appropriate, the results of the student's performance on any general state or district wide assessment; and
 - (4) The academic, developmental, and functional needs of the child.
- b. In developing, reviewing and revising the student's IEP, the IEP team considers the following special factors:
 - (1) The communication needs of the student; and
 - (2) The need for assistive technology services and/or devices.
- c. As appropriate, the IEP team also considers the following special factors:

- (1) For a student whose behavior impedes his/her learning or that of others, strategies, positive behavioral intervention and supports to address that behavior;
 - (2) For a student with limited English proficiency, the language needs of the student as those needs relate to the IEP;
 - (3) For a student who is blind or visually impaired, instruction in Braille and the use of Braille unless the IEP team determines, after an evaluation of reading and writing media, including evaluation of future needs for instruction in Braille or the use of Braille, that instruction in Braille or the use of Braille is not appropriate; and
 - (4) For a student who is deaf or hard of hearing, the student's language and communication needs, including opportunities for direct communication with peers and professional personnel in the student's language and communication mode, academic level and full range of needs, including opportunities for direct instruction in the student's language and communication mode.
- d. If, in considering these special factors, the team determines that a student needs a particular device or service (including an intervention, accommodation, or modification) for the student to receive a free appropriate education, the team includes a statement to that effect in the IEP.
- e. In addition to the above IEP contents, the IEP for each eligible student of transition age includes:
- (1) Beginning not later than the IEP in effect when the student turns 16 and updated annually thereafter appropriate measurable postsecondary goals based upon age appropriate transition assessments related to training, education, employment, and where appropriate, independent living skills and the transition services (including course of study) need to assist the student in reaching those goals;
 - (2) A statement that the student has been informed, at least one year before rights transfer that his/her rights will transfer to him/her upon reaching the age of majority, marriage or emancipation, whichever occurs first.

6. Incarcerated Youth

- a. For students with disabilities who are convicted as adults, incarcerated in adult correctional facilities and otherwise entitled to FAPE, the following IEP requirements do not apply:
 - (1) Participation of students with disabilities in state and districtwide assessment; and
 - (2) Transition planning and transition services, for students whose eligibility will end because of their age before they will be eligible to be released from an adult correctional facility based on consideration of their sentence and eligibility for early release.
- b. The IEP team may modify the student's IEP, if the state has demonstrated a bona fide security or other compelling penological interest that cannot be otherwise accommodated.

7. Extended School Year Services

- a. The District makes extended school year (ESY) services available to all students for whom the IEP team has determined that such services are necessary.
- b. ESY services are:

- (1) Provided to a student with a disability in addition to the services provided during the typical school year;
 - (2) Identified in the student's IEP; and
 - (3) Provided at no cost to the parent/guardian.
- c. Consideration of ESY services will not be limited to particular categories of disability, and will not be limited to a type, amount or duration of service.
- d. ESY services are available to maintain the student's skills or behavior; ESY services are not necessarily provided to teach new skills or behaviors.
- e. The District has established the following criteria for determining the need for ESY services:
- (1) This criteria includes:
 - (a) Evidence of the student's regression and recoupment of skills and/or behavior, based on documented evidence or, if no documented evidence, on predictions according to the professional judgment of the team;
 - (b) Regression means a significant loss of skills or behaviors in any area specified on the IEP as a result of an interruption in educational services;
 - (c) Recoupment means the recovery of skills and/or behavior to a level that was achieved prior to the interruption of service.
 - (2) Additional criteria which may be used in determining the need for ESY includes:
 - (a) The nature and severity of the disability;
 - (b) The student's rate of progress, as evidenced through evaluation data and/or progress on the IEP;
 - (c) The nature of the services requested (e.g., services that may be extraordinary or integral to the program); and
 - (d) Any skills that may be emerging or developing that would be lost without ESY services.

8. Assistive Technology

- a. The District ensures that assistive technology devices or assistive technology services, or both, are made available if they are identified as part of the student's IEP. These services and/or devices may be part of the student's special education, related services or supplementary aids and services.
- b. On a case-by-case basis, the District permits the use of district-purchased assistive technology devices in the student's home or in other settings if the student's IEP team determines that the student needs access to those devices to receive a free appropriate public education. In these situations, the parent/guardian are liable for loss, theft or damage due to negligence or misuse of the devices. When the student is no longer eligible for special education services in the District, assistive technology devices will be returned to the District.

9. Transfer Students

- a. In State

- (1) If a student with a disability (who had an IEP that was in effect in a previous district in Oregon) transfers into the District and enrolls in a District school within the same school year, the District (in consultation with the student's parent/guardian) provides a free appropriate public, education to the student (including services comparable to those described in the student's IEP from the previous District), until the District either:
 - (a) Adopts the student's IEP from the previous district; or
 - (b) Develops, adopts, and implements a new IEP for the student in accordance with all of the IEP provisions.

b. Out of State

- (1) If a student transfers into the District with a current IEP from a district in another state, the District, in consultation with the student's parent/guardian, will provide a free appropriate public education to the student, including services comparable to those described in the student's IEP from the previous district, until the District conducts an initial evaluation (if determined necessary by the new district to determine Oregon eligibility) with parent/guardian consent and determines whether the student meets eligibility criteria described in Oregon Administrative Rules.
- (2) If the student is eligible under Oregon criteria, the District develops, adopts, and implements a new IEP for the student using the Oregon Standard IEP or an approved alternate IEP.
- (3) If the student does not meet Oregon eligibility criteria, the District provides prior written notice to the parent/guardian explaining that the student does not meet Oregon eligibility criteria and specifying the date when special education services will be terminated.

w/edits

IGBAG-AR

Adopted: 4/1/00

Revised/Readopted: 3/7/06,

3/4/08, 2/14/11

Special Education - Procedural Safeguards

1. Procedural Safeguards

a. The district provides procedural safeguards to:

- 1) Parents/guardians (unless the guardian is a state agency) or persons in parental relationship to the student;
- 2) Surrogate parent/guardian; and
- 3) Students whose rights have transferred (called "adult students").

b. The district gives parent/guardian and adult student a copy of the Notice of Procedural Safeguards:

- 1) Once a year;
- 2) At the first referral or parent/guardian request for evaluation to determine eligibility for special education services;
- 3) When the parent/guardian (or adult student) requests a copy;
- 4) To the parent/guardian and the student one year before the student's 18th birthday or upon learning that the student is ~~considered~~ emancipated.

c. The Notice of Procedural Safeguards is:

- 1) Written in the native language of the parent/guardian (unless it is clearly not feasible to do so) and language clearly understandable to the public.
- 2) If the native language or other mode of communication of the parent/guardian is not a written language, the district shall take steps to ensure:
 - i) That the notice is translated orally or by other means to the parent/guardian in his/her native language or other mode of communication;
 - ii) That the parent/guardian understands the content of the notice; and
 - iii) That there is written evidence that the district has met these requirements.

2. Content of Procedural Safeguards Notice

The procedural safeguards notice includes all of the content provided in the *Notice of Procedural Safeguards* published by the Oregon Department of Education (ODE).

3. Parent/Guardian of Adult Student Meeting Participation

- #### a. The district provides parent/guardian or adult students an opportunity to participate in meetings with respect to the identification, evaluation, individualized education program (IEP) and educational

- placement of the student, and the provision of a ~~free appropriate public education~~ (FAPE) to the student.
- b. The district provides parent/guardian or adult students written notice of any meeting sufficiently in advance to ensure an opportunity to attend. The written notice:
- 1) States the purpose, time and place of the meeting and who is invited to attend;
 - 2) Advises that parent/guardian or adult students may invite other individuals who they believe have knowledge or special expertise regarding the student;
 - 3) Advises that the team may proceed with the meeting even if they are not in attendance;
 - 4) Advises who to contact before the meeting to provide information if they are unable to attend; and
 - 5) Indicates if one of the meeting's purposes is to consider transition services or transition service needs. If so:
 - a) Indicates that the student will be invited; and
 - b) Identifies any agencies invited to send a representative.
- c. The district shall take steps to ensure that one or both of the parent/guardian of a student with a disability are present at each IEP or placement meeting or are afforded the opportunity to participate, including:
- 1) Notifying parent/guardian of the meeting early enough to ensure that they will have an opportunity to attend; and
 - 2) Scheduling the meeting at a mutually agreed on time and place.
- d. If neither parent/guardian can participate, the district will use other methods to ensure participation, including, but not limited to, individual or conference phone calls or home visits.
- e. The district may conduct an evaluation planning or eligibility meeting without the parent or adult student if the district provided meeting notice to the parent or adult student sufficiently in advance to ensure an opportunity to attend.
- f. The district may conduct an IEP or placement meeting without the parent/guardian or adult student if the district is unable to convince the parent/guardian that he/she should participate.
- Attempts to convince the parent/guardian to participate will be considered sufficient if the district:
- 1) Communicates directly with the parent/guardian to arrange a mutually agreeable time and place and written notice was sent to confirm the arrangement; or
 - 2) Proposes a time and place in the written notice stating that a different time and place may be requested and confirms that the notice was received.
- g. If the district proceeds with an IEP meeting without a parent/guardian, the district must have a record of its attempts to arrange a mutually agreed upon time and place such as:
- 1) Detailed records of telephone calls made or attempted and the results of those calls;
 - 2) Copies of correspondence sent to the parent/guardian and any responses received; and
 - 3) Detailed records of visits made to the parent/guardian home or place of employment and the results of those visits.

- h. The district takes whatever action is necessary to ensure that the parent/guardian understands the proceedings at a meeting, including arranging for an interpreter for parent/guardian who are deaf or whose native language is other than English.
 - i. The rights to parents/guardian to participate in meetings transfers to the adult student under Oregon Administrative Rule OAR 581-015-2325.
 - j. After the transfer of rights to an adult student, the district shall provide written notice of meetings to the adult student and parent/guardian, if the parent/guardian can be reasonably located. A parent/guardian receiving notice of an IEP meeting is not entitled to attend the meeting unless invited by the adult student or the district.
 - k. An IEP meeting does not include:
 - 1) Informal or unscheduled conversations involving school district personnel;
 - 2) Conversations on issues such as teaching methodology, lesson plans or coordination of service provision if those issues are not addressed in the student's IEP; or
 - 3) Preparatory activities that district or public personnel engage in to develop a proposal or response to a parent/guardian proposal that will be discussed at a later meeting.
4. Surrogate Parent
- a. The district ensures that the rights of a student with a disability, or suspected of having a disability, are protected by appointing a surrogate parent not more than 30 days after a determination by the district that the child needs a surrogate when:
 - 1) The parent/guardian cannot be identified or located after reasonable efforts;
 - 2) The student is a ward of the state or an unaccompanied homeless student and there is reasonable cause to believe that the student has a disability; or
 - 3) The parent or adult student requests the appointment of a surrogate parent.
 - b. The district secures nominations of persons to serve as surrogates. The district appoints surrogates within 30 days of a determination that the student needs a surrogate, unless a surrogate has already been appointed by juvenile court.
 - c. The district ensures that each person approved to serve as a surrogate:
 - 1) Is not an employee of the district or the ~~Oregon Department of Education~~ ODE;
 - 2) Is not an employee of any other agency involved in the education or care of the student;
 - 3) Is free of any conflict of interest that would interfere with representing the student's special education interests; and
 - 4) Has knowledge and skills that ensure adequate representation of the student in special education decisions. The district will provide training, as necessary, to ensure that the surrogate parent has the requisite knowledge.
 - d. The district provides all special education rights and procedural safeguards to an appointed surrogate parent.
 - e. A surrogate will not be considered an employee of the district solely on the basis that the surrogate is compensated from public funds.

- f. The duties of the surrogate parent are to:
- 1) Protect the special education rights of the student;
 - 2) Be acquainted with the student's disability and the student's special education needs;
 - 3) Represent the student in all matters relating to the identification, evaluation, IEP and educational placement of the student; and
 - 4) Represent the student in all matters relating to the provision of a ~~free appropriate public education~~ FAPE to the student.
- g. A parent/guardian may give written consent for a surrogate to be appointed.
- 1) When a parent/guardian requests that a surrogate be appointed, the parent/guardian shall retain all parental rights to receive notice and all of the information provided to the surrogate. When the district appoints a surrogate at parent request, the district will continue to provide to the parent copy of all notices and other information to the surrogate.
 - 2) The surrogate, alone, shall be responsible for all matters relating to the special education of the student unless the parent/guardian revokes consent for the surrogate's appointment.
 - 3) If a parent/guardian gives written consent for a surrogate to be appointed, the parent/guardian may revoke consent at any time by providing a written request to revoke the surrogate's appointment;
 - 4) In the case of a child who is a ward of the court and who has been placed in foster care, the foster parent can serve as a parent. The district need not appoint a surrogate parent.
- h. A student to whom rights have transferred at age of majority may give written consent for a surrogate to be appointed. When an adult student requests that a surrogate be appointed, the adult student shall retain all rights to receive notice and all of the information provided to the surrogate. The surrogate, alone, shall be responsible for all matters relating to the special education of the adult student unless the student revokes consent for the surrogate's appointment. If an adult student gives written consent for a surrogate to be appointed, the adult student may revoke consent at any time by providing a written request to revoke the surrogate's appointment.
- i. The district may change or terminate the appointment of a surrogate when:
- 1) The person appointed as surrogate is no longer willing to serve;
 - 2) Rights transfer to the adult student or the student graduates with a regular or modified diploma;
 - 3) The student is no longer eligible for special education services;
 - 4) The legal guardianship of the student is transferred to a person who is able to carry out the role of the parent;
 - 5) A foster parent is identified who can carry out the role of parent;
 - 6) The parent/guardian, who previously could not be identified or located, is now identified or located;
 - 7) The appointed surrogate is no longer eligible;
 - 8) The student moves to another school district;
 - 9) The student is no longer a ward of the state or an unaccompanied homeless youth;
 - 10) An adult student rescinds consent for appointment of a surrogate.
- j. The district will not appoint a surrogate solely because the parent/guardian or student to whom rights have transferred is uncooperative or unresponsive to the special education needs of the student.

5. Transfer of Rights at Age of Majority

- a. When a student with a disability reaches the age of majority, marries or is emancipated, rights previously accorded to the student's parents under the special education laws, transfer to the student. A student for whom rights have transferred is considered an "adult student" under OAR 581-015-2000(1).
- b. The district provides notice to the student and the parent that rights (accorded by statute) will transfer at the age of majority. This notice is provided at an IEP meeting and documented on the IEP:
 - 1) At least one year before the student's 18th birthday;
 - 2) More than one year before the student's 18th birthday, if the student's IEP team determines that earlier notice will aid transition; or
 - 3) Upon actual knowledge that within a year the student will likely marry or become emancipated before age 18.
- c. The District provides written notice to the student and to the parent at the time of the transfer.
- d. These requirements apply to all students, including students who are incarcerated in a state or local adult or juvenile correctional facility or jail.
- e. After rights have transferred to the student, receipt of notice of an IEP meeting does not entitle the parent to attend the meeting unless invited by the student or the district.

6. Prior Written Notice

- a. The district provides prior written notice to the parent/guardian of a student, or adult student, within a reasonable period of time when before the district proposes to initiate or change, or refuses to initiate or change, the identification, evaluation or educational placement of the student, or the provision of a FAPE to the child.
 - (1) Proposes to initiate or change, the identification, evaluation or educational placement of the student, or the provision of a FAPE to the child; or
 - (2) Refuses to initiate or change the identification, evaluation or educational placement of the student, or the provision of a FAPE to the child.
- b. The content of the prior written notice will include:
 - 1) A description of the action proposed or refused by the district;
 - 2) An explanation of why the district proposed or refused to take the action;
 - 3) ~~A description of any options that the district considered and reasons why those options were rejected~~
 - 4) A description of each evaluation procedure, assessment, record or report used as a basis for the proposal or refusal;
 - 5) ~~A description of any other factors that are relevant to the District's proposal or refusal;~~
 - 5) A statement that the parent/guardian of a student with a disability have procedural safeguards and, if this notice is not an initial referral for evaluation, how a copy of the ~~Notice of Procedural Safeguards Notice~~ may be obtained; ~~and~~
 - 6) Sources for parent/guardian to contact to obtain assistance in understanding their procedural safeguards.
 - 7) A description of other options the IEP team considered and the reasons why those options were rejected; and
 - 8) A description of other factors that are relevant to the agency's proposal or refusal.

- d. The prior written notice is:
 - 1) Written in language understandable to the general public; and
 - 2) Provided in the native language of the parent/guardian or other mode of communication used by the parent/guardian, unless it is clearly not feasible to do so;
 - 3) If the native language or other mode of communication of the parent/guardian is not a written language, the district shall take steps to ensure that:
 - a) The notice is translated orally or by other means to the parent/guardian in the parent/guardian native language or other mode of communication;
 - b) A reasonable effort is made to help the parent/guardian to understand the content of the notice; and
 - c) There is written evidence that the requirements of this rule have been met.
- e. ~~If the proposed action requires prior written notice and written consent, the District may give notice at the same time consent is requested.~~

7. Consent¹ - Initial Evaluation

- a. The district provides notice and obtains informed written consent from the parent/guardian or adult student before conducting an initial evaluation to determine whether a student has a disability (as defined by Oregon law) and needs special education. Consent for initial evaluation is not consent for the district to provide special education and related services.
- b. The district makes reasonable efforts to obtain informed consent from a parent/guardian for an initial evaluation to determine a child's eligibility for special education services. If a parent/guardian does not provide consent for an initial evaluation or does not respond to a request for an initial evaluation, the district may, but is not required to, pursue the initial evaluation of the child through mediation or due process hearing procedures. The district does not violate its child find obligations if it declines to pursue the evaluation using these procedures.

8. Consent – Initial Provision of Special Education Services

- a. The district provides notice and obtains informed written consent from the parent/guardian or adult student before ~~the initial provision of special education and related services to the student~~ conducting an initial evaluation to determine whether a student has a disability (as defined by Oregon law) and needs special education. Consent for initial evaluation is not consent for the district to provide special education and relate services.
- b. The district makes reasonable efforts to obtain informed consent from a parent/guardian for an initial evaluation to determine a child's eligibility for special education services. ~~but~~ If a parent/guardian ~~or adult student~~ does not provide consent for an initial evaluation or does not respond to a request for an initial evaluation, the district may, but is not required to, pursue the initial evaluation of the child through mediation or due process hearing procedures. The district does not violate its child find obligations if it declines to pursue the evaluation using these procedures. ~~of special education and related services, the district does not seek to provide special education and related services through mediation or due process hearing procedures. The district will not be considered to be in violation of the requirement to make free~~

¹ "Consent means that the parent or adult student: 1) has been fully informed, in his/her native language or other mode of communication, of all information relevant to the activity for which consent is sought; and b) understands and agrees in writing to the carrying out of the activity for which his/her consent is sought. Consent is voluntary on the part of the parent and meeting the requirements of consent provision for OAR 581-015-2090, IDEA and Family Education Rights and Privacy Act (FERPA).

~~appropriate public education (FAPE) available to the student under these circumstances. The district stands ready to serve the student if the parent/guardian or adult student later consents.~~

9. Consent – Reevaluation

- a. The district obtains informed parent/guardian consent before conducting any reevaluation of a child with a disability.
- b. Exceptions:
 - 1) The district does not need written consent for a reevaluation, if, after reasonable efforts to obtain informed consent, the parent/guardian does not respond. However, the district does not conduct individual intelligence tests or tests of personality without consent.
 - 2) If a parent/guardian refuses to consent to the reevaluation, the district may, but is not required to, pursue the reevaluation by using mediation or due process hearing procedures.

10. Consent – Revocation

- a. A parent/guardian or adult student may revoke consent at any time before the completion of the activity for which they have given consent.
- ~~b. A parent/guardian or adult student may revoke consent for an evaluation or reevaluation that has not yet been conducted.~~
- ~~c. A parent/guardian or adult student may revoke consent for initial provision of special education services before the initiation of those services.~~
- b. If a parent/guardian or adult student revokes consent, that revocation is not retroactive.

11. Consent – Other Requirements

- a. The district documents its reasonable efforts to obtain parent/guardian consent, such as phone calls, letters, and meeting notes.
- b. If a parent/guardian of a student who is home schooled or enrolled by the parent/guardian in a private school does not provide consent for the initial evaluation or the reevaluation, or if the parent/guardian does not respond to a request for consent, the district:
 - 1) Does not use mediation or due process hearing procedures to seek consent; and
 - 2) Does not consider the child as eligible for special education services.
- c. If a parent/guardian or adult student refuses consent for one service or activity, the district does not use this refusal to deny the parent/guardian or child any other service, benefit or activity, except as specified by these rules and procedures.
- d. If, at any time subsequent to the initial provision of special and related services, the parent of a child revokes consent in writing for the continued provision of special education and related services, the district:
 - 1) May not continue to provide special education and related services to the child, but must provide prior written notice before ceasing the provision of special education and related services;
 - 2) May not use mediation or due process procedures to obtain an agreement or ruling that the services may be provided to the child;
 - 3) The district will not be considered to be in violation of the requirement to make FAPE available to the child because of the failure to provide the child with further special education and related services;
 - 4) The district is not required to convene an IEP team meeting or develop and IEP for the child for further provision of special education or related services;

~~5) Is not required to amend the student's education records to remove any references to the student's receipt of special education and related services because of the revocation of consent.~~

12. Exceptions to Consent

- a. The district may review existing data as part of an evaluation or reevaluation without consent.
- b. The district may administer a test or other evaluation administered to all students without consent unless, before administration of that test or evaluation, consent is required of parent/guardian of all students.
- c. The district may conduct evaluations, tests, procedures or instruments that are identified on the student's individualized education program (IEP) as a measure for determining progress without parent/guardian consent.
- d. If the district can demonstrate that it has taken reasonable measures to obtain written consent, and the parent/guardian has failed to respond, written consent need not be obtained for reevaluation, except for tests of individual intelligence and all tests of personality.
- e. The parent's rights have been terminated in accordance with state law; or
- f. The rights of the parent to make educational decisions have been subrogated by a judge in accordance with state law and consent for an initial evaluation has been given by an individual appointed by the judge to represent the child.
 - 1) If the district proceeds with a reevaluation without parent/guardian consent, the district will maintain a record of attempts to gain parental/guardian consent, such as:
 - a) Detailed records of telephone calls made or attempted and the results of those calls;
 - b) Copies of correspondence sent to the parent/guardian and any responses received;
 - c) Detailed records of visits made to the parent/guardian home or place of employment and the results of those visits:
 - 2) Written parental consent is not required if an administrative law judge (ALJ) determines that the evaluation or reevaluation is necessary to ensure that the student is provided with a free appropriate public education.
 - 3) The district does not need written parent/guardian consent before conducting a screening of a student by a teacher or specialist to determine appropriate instructional strategies for curriculum implementation.

13. Independent Educational Evaluations (IEE)

- a. A parent of a student with a disability has a right to an independent educational evaluation at public expense if the parent disagrees with an evaluation obtained by the district.
- b. If a parent/guardian requests an independent educational evaluation at public expense because the parent/guardian disagrees with an evaluation obtained by the district, the district provides information to parent/guardian about where an independent educational evaluation may be obtained, and the district criteria applicable for independent educational evaluations.
- c. If a parent/guardian requests an independent educational evaluation at public expense, the district, without unnecessary delay, either:
 - 1) Initiates a due process hearing to show that its evaluation is appropriate; or

- 2) Ensures that an independent educational evaluation is provided at public expense unless the district demonstrates in a hearing that the evaluation obtained by the parent/guardian did not meet district criteria.
- c. The district criteria for independent educational evaluations are the same as for district evaluations including, but not limited to, location, examiner qualifications and cost.
- 1) Criteria established by the district do not preclude the parent/guardian access to an independent educational evaluation.
 - 2) The district provides the parent/guardian the opportunity to demonstrate the unique circumstances justifying an IEE that does not meet the district's criteria.
 - 3) A parent/guardian may be limited to one independent educational evaluation at public expense each time the district conducts an evaluation with which the parent/guardian disagrees.
- d. If a parent/guardian requests an independent educational evaluation, the District may ask why the parent/guardian disagrees with the public evaluation. The parent/guardian may, but is not required to, provide an explanation. The District may not:
- 1) Unreasonably delay either providing the independent educational evaluation at public expense or initiating a due process hearing to defend the public evaluation;
 - 2) Except for the criteria in c., impose conditions or timelines related to obtaining an IEE at public expense.
- e. The district considers an independent educational evaluation submitted by the parent/guardian, in any decision made with respect to the provision of a free appropriate public education FAPE to the student.

14. Dispute Resolution – Mediation

- a. The district or parent may request mediation from ODE for any special education matter, including before the filing of a complaint or due process hearing request.
- b. The district acknowledges that:
 - 1) Mediation must be voluntary on the part of the parties, must be conducted by a qualified and impartial mediator who is trained in effective mediation techniques and may not be used to deny or delay a parent's right to a due process hearing or filing a complaint.
 - 2) Each mediation session must be scheduled in a timely manner and must be held in a location that is convenient to the parties to the dispute.
 - 3) An agreement reached by the parties to the dispute in the mediation process must be set forth in a legally binding written mediation agreement that:
 - (a) Sates the terms of the agreement;
 - (b) States that all discussions that occurred during the mediation process remain confidential and may not be used as evidence in any subsequent due process hearing or civil proceeding; and
 - (c) Is signed by the parent and a representative of the district who has the authority to bind the district to the mediation agreement.
 - 4) Mediation communication is not confidential if it relates to child or elder abuse and is made to a person who is required to report abuse, or threats of physical harm, or professional conduct affecting licensure.

- 5) The mediation agreement is enforceable in any state court of competent jurisdiction or in a district court of the United States.

15. Dispute Resolution – Complaint Investigation

- a. Any organization or person may file a signed, written complaint with the State Superintendent of Public Instruction alleging that a district or education service district (ESD) is violating or has violated the Individuals with Disabilities Education Act (IDEA) or associated regulations within one year before the date of the complaint. Upon receiving a parent complaint, the ODE forwards the complaint to the district or ESD along with a request for a district response to the allegations in the complaint.
- b. Upon receiving a request for response from ODE, the district responds to the allegations and furnishes any requested information or documents within 10 business days.
- c. The district sends a copy of the response to the complainant. If ODE decides to conduct an on-site investigation, district personnel participate in interviews and provide additional documents as needed.
- d. The district and the complainant may attempt to resolve a disagreement that led to a complaint through mediation. If they decide against mediation, or if mediation fails to produce an agreement, ODE will pursue the complaint investigation.
- e. If ODE substantiates some or all of the allegations in a complaint, it will order corrective action. The district satisfies its corrective action obligation in a timely manner.
- f. If the district disagrees with the findings and conclusions in a complaint final order, it may seek reconsideration by ODE or judicial review in county circuit court.

16. Due Process Hearing Requests

- a. The district acknowledges that parents may request a due process hearing if they disagree with a district proposal or refusal relating to the identification, evaluation, educational placement or provision of a free appropriate education to a student who may have a disability and be eligible for special educations.
- b. The district may request a due process hearing regarding the identification, evaluation, educational placement or provision of a free appropriate education to a student who may have a disability and be eligible for special education.
- c. When requesting a due process hearing, the district or the attorney representing the district provides notice to the parent and to ODE.
- d. The party, including the district, that did not file the hearing request must, within 10 days of receiving the request for a hearing, send to the other party a response that specifically addresses the issues raised in the hearing request.
- e. If the parent had not yet received prior written notice of the district’s proposal or refusal, the district, within 10 days of receiving the hearing request for a due process hearing, sends to the parent a response that includes:
 - 1) An explanation of why the district proposed or refused to take the action raised in the hearing request;
 - 2) A description of other options that the district considered and the reasons by those options were rejected;
 - 3) A description of each evaluation procedure, assessment, record or report the district used as the basis for the proposed or refused action; and
 - 4) A description of the factors relevant to the district’s proposal or refusal.

17. Resolution Session

- a. Within 15 days of receiving a due process hearing request, the district will hold a resolution session with the parents and the relevant members of the IEP team who have specific knowledge of the facts identified in the due process hearing request.
- b. This meeting will include a representative of the district who has decision-making authority for the district.
 - 1) The district will not include an attorney unless the parent brings an attorney.
 - 2) The district will provide the parent with an opportunity for the parent to discuss the hearing request and related facts so that the district has an opportunity to resolve the dispute.
 - 3) The district and parent may agree in writing to waive the resolution meeting. If so, the 45-day hearing timeline will begin the next business day, unless the district.

18. Time Limitations and Exception

- a. A parent must request a due process hearing within two years after the date of the district act or omission that gives rise to the parent’s hearing request.
- b. This timeline does not apply to a parent if the district withheld relevant information from the parent or incorrectly informed that parent that it had resolved the problem that led the parent’s hearing request.

19. Due Process Hearing Costs:

- a. The District will reimburse the ~~Oregon Department of Education~~ ODE for the administrative law judge costs related to conducting the hearing, including prehearing conferences, scheduling arrangements and other related matters;
- b. The District will provide the parent/guardian with a written or, at the option of the parent/guardian, an electronic verbatim recording of the hearing, within a reasonable time of the closing of the hearing.
- c. The District does not use Individuals with Disabilities Education Act (IDEA) funds to pay attorney's fees or other hearing costs.

20. Discipline and placement in interim alternative setting - see JGDA/JGEA.

~~20—Transfer of Rights at Age of Majority~~

- ~~a. —When a student with a disability reaches the age of majority, marries or is emancipated, rights previously accorded to the student’s parent/guardian under the special education laws transfer to the student. A student for whom rights have transferred is considered an “adult student” under OAR 581-015-2000(1).~~
- ~~b. —The District provides notice to the student and the parent/guardian that rights (accorded by statute) will transfer at the age of majority. This notice is provided at an IEP meeting and documented on the IEP:~~
 - ~~1) —At least one year before the student’s 18th birthday;~~
 - ~~2) —More than one year before the student’s 18th birthday, if the student’s IEP team determines that earlier notice will aid transition; or~~
 - ~~3) —Upon actual knowledge that within a year the student will likely marry or become emancipated before age 18.~~

- ~~c. The District provides written notice to the student and to the parent/guardian at the time of the transfer.~~
- ~~d. These requirements apply to all students, including students who are incarcerated in a state or local adult or juvenile facility or jail.~~
- ~~e. After transfer of rights to the student, the District provides any written prior notices and written notices of meetings required by the special education laws to the adult student and to the parent/guardian if the parent/guardian can be reasonably located.~~
- ~~f. After rights have transferred to the adult student, receipt of notice of an IEP meeting does not entitle the parent/guardian to attend the meeting unless invited by the adult student or the District.~~
- ~~g. After the rights have transferred, an adult student may ask the school district to appoint a surrogate parent if the adult student prefers not to exercise these rights and has no court appointed guardian.~~

PROPOSED NEW LANGUAGE by OSBA

Code: IGBAH-AR

Revised/Readopted: 3/4/08, 3/7/06

Special Education - Evaluation and Eligibility Procedures**

(This is the AR that as has been reviewed and approved by ODE.)

1. Request for Initial Evaluation
 - a. Consistent with its child find and parent consent obligations, the district responds promptly to requests initiated by a parent or public agency for an initial evaluation to determine if a child is a child with a disability.
 - b. Upon receiving a request from a parent or public agency for an initial evaluation, the district designates a team to determine whether an initial evaluation will be conducted.
 - (1) The district team includes the parent and at least two professionals, at least one of whom is a specialist knowledgeable and experienced in the evaluation and education of children with disabilities.
 - (a) The team may make the decision to evaluate with or without a meeting.
 - (b) The district documents team members' input, including parents whether or not the district convenes a meeting.
 - c. If a meeting is held, the district invites parents to participate.
 - d. If the district agency refuses an evaluation requested by the parent, the district provides the parent with prior written notice of its refusal to conduct an evaluation.
 - e. The district acknowledges the parent's rights to challenge its refusal to conduct an evaluation.
2. The initial evaluation consists of procedures:
 - a. To determine if the child has a disability; and
 - b. To identify the child's educational needs.
3. The district conducts the initial evaluation within 60 school days of receiving parental consent for evaluation unless:
 - a. The district and the parents in writing to extend the timeline for an evaluation to determine eligibility for specific learning disabilities;
 - b. The child moves from another district during the evaluation, the district is making sufficient progress to ensure a prompt completion of the evaluation, and the parent and the district agree in writing to a specific time when the evaluation will be completed; or
 - c. The parent repeatedly fails or refuses to produce the child for evaluation.

4. Re-evaluation

a. The district conducts re-evaluations:

- (1) When the educational or related services needs, including improved academic achievement and functional performance of the child, warrant an evaluation;
- (2) When the child's parents or teacher request a re-evaluation; and
- (3) At least every three years, unless that parent and the district agree that a re-evaluation is unnecessary.

b. The district does not conduct reevaluation more than once a year, unless the parent and district agree otherwise.

5. Evaluation Planning

a. The district, or designated referral and evaluation agency for preschool children, ensures that, as part of an initial evaluation (if appropriate), the child's individualized education program (IEP) or individualized family service plan (IFSP) team, including the parents and other qualified professionals, as appropriate, review and document their review of existing evaluation data on the child including:

- (1) Evaluations and information provided by the child's parents;
- (2) Current classroom-based, local or state assessments and classroom-based observations; and
- (3) Observations by teachers and related service providers.

b. On the basis of that review and input from the child's parents, identify what additional data if any is needed to determine:

- (1) Whether the child has a disability;
- (2) The child's present levels of academic achievement and related development needs;
- (3) Whether the child needs or continues to need early intervention/early childhood special education (EI/ECSE) or special education and related services; and
- (4) For re-evaluation, whether the child needs any additions or modifications to the special education and related services or, for a preschool child, any additions or modification to ECSE services:
 - (a) To enable the child to meet the measurable annual goals in the child's IEP or IFSP; and
 - (b) To participate, as appropriate, in the general education curriculum or, for preschool children, appropriate activities.

6. Evaluation Procedures

- a. The district assesses the child in all areas related to the suspected disability, including, if appropriate, health, vision, hearing, social and emotional status, general intelligence, academic performance, communicative status and motor abilities.
- b. The evaluation is sufficiently comprehensive to identify all of the child's special education and related needs, whether or not commonly linked to the disability category in which the child has been classified.
- c. The evaluation includes information provided by the parent and a variety of assessment tools and strategies to gather relevant functional, developmental and academic information about the child that assist in determining:
 - (1) Whether the child has a disability; and
 - (2) The content of the child's IEP, including information related to enabling the child to be involved in and progress in the general education curriculum (or for a preschool child, to participate in appropriate activities).
- d. The district ensures that assessments and other evaluation materials, including those tailored to assess specific areas of educational need, used to assess a child:
 - (1) Are selected and administered so as not to be discriminatory on a racial or cultural basis;
 - (2) Are provided and administered in the child's native language or other mode of communication and in the form most likely to yield accurate information on what the child knows and can do academically, developmentally and functionally, unless it is clearly not feasible to do so;
 - (3) Are used for the purposes for which the assessments or measures are valid and reliable;
 - (4) Are administered by trained and knowledgeable personnel; and
 - (5) Are administered in accordance with any instructions provided by the producer of the assessments.
- e. The district selects and administers assessments to ensure that if an assessment is administered to a child with impaired sensory, manual or speaking skills, the assessment results accurately reflect the child's aptitude or achievement level or whatever other factors the test purports to measure, rather than reflecting the child's impaired sensory, manual or speaking skills (unless those skills are the factors that the test purports to measure).
- f. The district uses technically sound instruments that may assess the relative contribution of cognitive factors and behavioral factors in addition to physical or developmental factors.
- g. The district does not use any single measure of assessment as the sole criterion for determining whether a child is a child with a disability and for determining an appropriate educational program for the child.

7. Requirements if Additional Evaluation Data is not Needed to Determine Eligibility

- a. If the child's IEP or IFSP team determines that no additional data is needed to determine whether or not the child is or continues to be a child with a disability, and to determine the child's educational and developmental needs, the district provides prior written notice of that decision, the reasons for it, and the right of parents to request an assessment.

- b. When the IEP or IFSP team determines that no additional data is needed to determine eligibility, the district does not conduct an assessment of the child unless requested to do so by the parents.

8. Evaluation Procedures for Transfer Students

When a child with disabilities transfers from one district to another district in the same school year, the district coordinates with the previous district to complete any pending assessment as quickly as possible.

9. Eligibility Determination

- a. Once evaluation is completed, the district designates an eligibility team to determine whether the child is eligible for special education services.
- b. This team includes:
 - (1) Two or more professionals, one of whom will be knowledgeable and experienced in evaluating and teaching students with the suspected disability; and
 - (2) The student's parent(s).
- c. For consideration of eligibility in the area of specific learning disabilities, the district eligibility team includes:
 - (1) A group of qualified professionals and the parent;
 - (2) The child's regular classroom teacher or, if the child does not have a regular classroom teacher, a regular classroom teacher qualified to teach a child of his or her age, or for a child of less than school age, a preschool teacher; and
 - (3) A person qualified to conduct individual diagnostic examinations of children, such as a school psychologist, speech-language pathologist or other qualified professional.
- d. In interpreting evaluation data, each district team carefully considers and documents information from a variety of sources, including but not limited to, aptitude and achievement tests, teacher recommendations, physical condition, social or cultural background and adaptive behavior and all required elements of the evaluation.
- e. Each eligibility team prepares a written eligibility statement that includes:
 - (1) Identification of the evaluation data considered in determining the child's eligibility, including the required evaluation components for the disability under consideration;
 - (2) A determination of whether the child meets the minimum evaluation criteria for one or more of the disability categories in Oregon Administrative Rule;
 - (3) A determination of whether the primary basis for the suspected disability is:
 - (a) A lack of appropriate instruction in reading (including the essential components of reading) or math; or
 - (b) Limited English proficiency.

- (4) A determination of whether the child's disability has an adverse impact on the child's educational performance;
 - (5) A determination of whether, as a result of the disability, the child needs special education services;
 - (6) The signature of every team member and an indication of whether each agrees with the eligibility determination;
 - (7) For a child suspected of having a specific learning disability, the team's written report includes additional specific documentation as required by Oregon Administrative Rule.
- f. The team does not find a child eligible as a child with a disability if the determinant factor for that eligibility decision is:
- (1) Lack of appropriate instruction in reading, including the essential components of reading instruction or lack of appropriate instruction in math; or
 - (2) Limited English proficiency; and
 - (3) The child does not otherwise meet the eligibility criteria found in Oregon Administrative Rule for the category(ies) of disability under consideration.
- g. The team finds a child eligible if the child has a disability and needs special education and related services, even though the child is advancing from grade to grade.
- h. A child may have disabilities in more than one disability category, but the team needs to find the child eligible in only one category. However, the district evaluates the child in all areas related to the suspected disability or disabilities, and the child's IEP addresses all of the child's special education needs.

Special Education - Evaluation and Eligibility Procedures

1. Requirements for Initial Evaluation

- a. The District conducts a full and individual evaluation of a student's educational needs that meets the criteria established in the Oregon Administrative Rules before determining that the student is eligible for special education services, and before beginning to provide special education and related services.
- b. Parent/guardian, the district, state agencies or other interested individuals may refer a student for an initial special education evaluation. An initial eligibility evaluation will be conducted if the district suspects that a student may have a disability that has an adverse impact on educational performance and the student may need special education services as a result of the disability.
- c. The district designates a team to determine whether an evaluation will be conducted. The team includes at least two professionals, at least one of whom is a specialist knowledgeable and experienced in the evaluation and education of students with disabilities, and the parent/guardian.
- d. In determining what testing and/or further assessment may be necessary, the team will review existing information. (See Evaluation Planning, Review of Existing Information and Evaluation Procedures below.)
- e. For an initial evaluation, the District:
 - (1) Provides the parent/guardian with prior written notice of the intent to conduct an initial evaluation, and obtains consent for such evaluation;
 - (2) Seeks to obtain informed consent from the parent/guardian for such an evaluation;
 - (3) Shall provide prior written notice of the refusal to conduct an initial evaluation.
- f. If the parent/guardian refuses consent for initial evaluation, the District may seek a due process hearing in order to initiate the evaluation.
- g. The District shall not be required to obtain informed consent from the parent/guardian of a child for an initial evaluation if;
 - (1) The agency cannot discover the whereabouts of the parent/guardian;
 - (2) The rights of parent/guardians have been terminated in accordance with state law; or
 - (3) The rights of the parent/guardian to make educational decisions have been subrogated by a judge in accordance with state law and consent for evaluation has been given by an individual appointed by the judge to represent the child.

2. Requirements for Reevaluation

- a. The District conducts a complete reevaluation:
 - (1) At least once every three years unless the parent/guardian and District agree in writing the reevaluation is unnecessary and not more than once a year unless the parent/guardian and District agree otherwise; or
 - (2) If the District determines that the educational or related services needs, including improved academic achievement and functional performance of the child warrant reevaluation or whenever conditions warrant a reevaluation, including if the student's parent/guardian or teacher(s) requests a reevaluation.

3. Evaluation Planning and Review of Existing Information: Evaluation and Reevaluation

- a. As part of an initial evaluation (if appropriate) and as part of any reevaluation, the IEP team, and other professionals as appropriate, shall review existing data and other information that is available, including:
 - (1) Any evaluations and information provided by the parent/guardian;
 - (2) Any current classroom-based, local or state assessments and observations; and
 - (3) Any observations by teachers and other related service providers; and
- b. On the basis of that review, and input from the child's parent/guardian, identify what additional data, if any are needed to determine:
 - (1) Whether or not a student is eligible under any category(ies) of disability(ies), and the educational needs of the child or in case of reevaluation of a student, whether the student continues to have such a disability and such educational needs; including the need for special education and related service(s);
 - (2) The present levels of academic achievement and related development needs;
 - (3) Whether the student needs special education and related services or case of a reevaluation, whether the student continues to need special education and related services; and
 - (4) In the case of reevaluation, whether any additions or modifications in the special education and related services are needed to allow the student to meet the measurable annual IEP goals, and to participate in the general education curriculum.
- c. The IEP team and other professionals, as appropriate, may review existing information without a meeting, but the parent/guardian information is required as described above. If a meeting is held, the parent/guardian will be provided the opportunity to participate.
- d. If the IEP team determines that no additional data are needed to determine whether the student continues to be a student with a disability and to determine the student's educational needs, the District:
 - (1) Shall notify the student's parent/guardian of that determination, and the reasons for the determination; and the rights of the parent/guardian to request an assessment; and
 - (2) Is not required to conduct further assessment unless requested to do so by the parent/guardian.

- e. If additional data are determined to be necessary, the District provides the parent/guardian with written prior notice of the proposed evaluation and requests written parent/guardian consent for the evaluation. If the parent/guardian fails to respond to the request for consent, the District documents that reasonable measures were taken to obtain consent (including, at a minimum, documentation that the parent/guardian received the notice and request) and then, except for personality or individual intelligence tests, conducts the reevaluation despite the lack of consent. If the parent/guardian refuses consent for reevaluation or fails to respond to a request for consent to personality or individual intelligence testing, the District may seek a due process hearing in order to demonstrate the need for reevaluation.
- f. Parent/guardian consent is obtained prior to any testing of intelligence or personality.

4. Evaluation Procedures

- a. The District uses a variety of assessment tools and strategies to gather relevant functional, developmental and academic information, including information provided by the parent/guardian.
- b. The District ensures that all tests and evaluations used to assess a child are:
 - (1) Selected and conducted so as not to be racially or culturally discriminatory;
 - (2) Provided and administered in the student's native language or other form of communication and in the form most likely to yield accurate information on what the child knows and can do academically, developmentally, and functionally or other mode of communication, unless it is clearly not feasible to do so;
 - (3) Used for purposes for which assessments or measures are valid and reliable;
 - (4) Administered by trained and knowledgeable personnel;
 - (5) Administered in accordance with any instructions provided by the producer of such assessments; and
 - (6) For students with limited English proficiency, are reflective of the student's English language skills; the assessments will measure the extent to which the student may have a disability and need special education, and not solely reflect the student's limited English proficiency.
- c. Tests and other evaluation measures include those that are designed to assess specific areas of educational need, not only those designed to provide a single intelligence quotient.
- d. When testing students with impaired sensory, manual or speaking skills, the tests used will accurately reflect the student's actual abilities rather than solely reflect the impairment.
- e. No single evaluation tool will be used as the sole instrument in determining eligibility for special education, including the need for special education and related services.
- f. Each student is assessed in all areas related to each suspected disability, including, if appropriate:
 - (1) Health;
 - (2) Vision;
 - (3) Hearing;
 - (4) Social and emotional status;
 - (5) General intelligence;
 - (6) Academic performance;

- (7) Communication skills; and
 - (8) Motor abilities.
- g. The evaluation is comprehensive enough to identify all the student's special education and related service needs, whether or not these needs are commonly associated with the suspected or identified disability category(ies).
 - h. The District uses technically sound instruments that may assess the relative contribution of:
 - (1) Cognitive factors;
 - (2) Behavioral factors; and
 - (3) Physical or developmental factors.
 - i. The student is evaluated in a manner that assists in determining his/her educational needs.
 - j. The District completes the assessment in a reasonable period of time. Reasonable period of time means within 60 school days of receiving parent/guardian consent for evaluation except in the following circumstances documented in the student's records:
 - (1) Special circumstances beyond the control of the District require a longer period;
 - (2) The District and the parent/guardian agree in writing to extend the deadline for an evaluation to determine eligibility for specific learning disabilities in accordance with OAR 581-015-2170.
 - (3) The parent/guardian repeatedly fails or refuses to produce the child for an evaluation.
 - k. The team prepares an evaluation report that describes and explains the results of the evaluation conducted. The District provides a copy of the evaluation report to the parent/guardian.
 - l. Assessment of children with disabilities who transfer from one school district to another in the same academic year are coordinated with children's prior and subsequent schools, as necessary and as expeditiously as possible, to ensure prompt completion of full evaluations. If a child enrolls in a school after the 60 day timeline has begun and prior to a determination of eligibility by the previous school district, the 60 day timeline does not apply to the new district, if the new district is making sufficient progress to ensure a prompt completion of the evaluation and the parent/guardian and the District agree to a specific time for completion.

5. Eligibility Determination

- a. Once evaluation is completed, the District designates an eligibility team to determine:
 - (1) Whether or not the student is a student with a disability; and
 - (2) The special educational needs of the child.
- b. The team will include:
 - (1) Two or more professionals, one of whom will be knowledgeable and experienced in evaluating and teaching students with the suspected disability; and
 - (2) The student's parent/guardian.
- c. In interpreting evaluation data to determine eligibility and the student's educational needs, the team draws upon information from a variety of sources and ensures that the information is

documented and carefully considered.

- d. The District prepares a written eligibility statement and provides a copy to the parent/guardian. The eligibility statement includes:
 - (1) A description of all evaluation data used in determining the student's eligibility;
 - (2) Determination of whether or not the student meets the eligibility criteria for one or more of the disabilities described in Oregon Administrative Rules.
 - (3) A determination of whether the disability has an adverse impact on the student's education performance; and
 - (4) A determination of whether the student needs special education as a result of the disability.
 - (5) A determination of whether the primary basis for the suspected disability is:
 - (a) a lack of instruction in reading or math;
 - (b) limited English proficiency;
 - (6) The signature of each member of the eligibility team, indicating their agreement or disagreement with the eligibility determination. If disagreeing, the team member(s) includes a separate statement of his/her conclusions.

- e. For students who may be eligible in more than one disability category, the District ensures that:
 - (1) The student is evaluated in all the areas related to the suspected disability(ies); and
 - (2) The student's IEP addresses all the special education and related service needs.

- f. In addition to the above, for students with suspected specific learning disabilities:
 - (1) The eligibility team includes:
 - (a) The student's regular classroom teacher, or if the student doesn't have a regular classroom teacher, a regular classroom teacher qualified to teach students who are the same age; and
 - (b) A person qualified to conduct individual diagnostic examinations (e.g., school psychologist, speech-language pathologist, other qualified professionals).

 - (2) The written evaluation report includes:
 - (a) Statement regarding whether the student has a specific learning disability;
 - (b) The basis for this determination;
 - (c) A description of relevant behavior that was documented during an observation of the student, including a description of the relationship of that behavior to the student's academic functioning;
 - (d) If appropriate, educationally relevant medical findings;
 - (e) Whether there is a significant discrepancy between intellectual ability and achievement which is not correctable without special education; and
 - (f) A statement of eligibility team determination regarding the effects of environmental, cultural or economic disadvantage.

- g. The team may not find a child eligible for special education services if the determinant factor for such determination is lack of appropriate instruction in reading, math, or limited English proficiency.

6. Termination of Special Education Eligibility

- a. Before determining that a student is no longer eligible for special education and related services, the district completes a reevaluation, except when:
 - (1) The student becomes ineligible because of graduation with a regular high school diploma; or
 - (2) The student becomes ineligible due to age.

New Language

Code: IGBAI-AR

Revised/Readopted: 3/4/08, 7/17/06

Special Education - Private Schools

Approved Private Schools

1. Obligations of the district:
 - a. The district ensures that parents/guardians are included in any decision about their child's evaluation, eligibility, placement or provision of services.
 - b. If the district refers a student with a disability to, or places such a student in, a private school or facility as a means of providing special education and related services, the district ensures that the student receives an education that meets the standards of the state in a private preschool, school or facility approved by the Oregon Department of Education (ODE) to provide such education in conformance with an individualized education program (IEP), and at no cost to the parents/guardians, and has all the rights of a student with a disability who is served by the district.
 - c. Before placing a student with a disability in an approved private school or preschool, the district ensures that the program has current ODE approval to provide special education and related services.
 - d. The district or public agency fulfills all federal and state requirements relating to the evaluation, the IEP/individualized family service plan (IFSP) development and placement when determining whether to place the child in an approved private preschool or school for special education services.
 - e. For each student age three through 21, the district's or public agency's placement team, including the parent, determines whether placement in an approved private school constitutes a free appropriate public education in the least restrictive environment.
 - (1) When proposing to place a child with a disability in an approved private school or preschool, the district ensures that school-age students are district residents or preschool- age children are eligible to receive early intervention/early childhood special education (EI/ECSE) or special education services.
 - (2) The district initiates and conducts an individualized education program team meeting that includes a representative of the approved private school. If a representative of the approved private school, or other member of the IEP/IFSP team is unable to attend the IEP/IFSP meeting, the district and the parent may agree to use alternative means of meeting participation such as individual or conference telephone calls, or video conferences.
 - (3) After the district initially places a student in an approved private school, any subsequent meetings to review or revise an IEP/IFSP or placement are the responsibility of the district or public agency, unless the district or public agency requests by written agreement that the approved private school initiate and conduct meetings to review and revise the IEP or IFSP.

- (4) The district may, by written agreement, request that the approved private school initiate and conduct meetings to review and revise the IEP or IFSP. Under such an agreement the district remains responsible for ensuring the private school or preschool meets:
 - (a) All federal and state requirements related to these meetings; and
 - (b) Ensures the participation of parents/guardians and the district or public agency representative.
- (5) The private school or preschool may not determine or implement program changes without the participation and agreement of the parents/guardians and the district or public agency representative.
- (6) The district in which the child resides provides transportation to and from the approved private school or preschool at no cost to the parent.
- (7) The district or public agency terminates the placement of students in a private school or preschool if ODE suspends, revokes or refuses to renew the approval of a private school or preschool.
 - (a) The district ensures that every student with a disability who is placed in or referred to a private school or facility by the district as a means of providing special education and related services:
 - (i) Receives education and services that constitute a free appropriate public education in the least restrictive environment at no cost to the parents/guardians;
 - (ii) Is provided an education that meets the standards that apply to education provided by the public agency; and
 - (iii) Has all of the rights of a student with a disability who is served by the public agency.
 - (b) The district ensures that all applicable federal and state requirements relating to the evaluation, eligibility, IEP development, placement and procedural safeguards are followed when determining whether the student will be placed in an approved private school for special education services.
 - (c) The district initiates and conducts an IEP meeting at which an IEP is developed based upon the needs of the student before determining placement of a student with a disability in an approved private school.

2. Out-of-State Placements for Special Education

- a. The district ensures that any private educational institution located outside the state of Oregon with which it contracts to provide special education and related services to Oregon students is approved by the state educational agency of the state in which the educational institution is located. If the state does not have a formal approval process, the educational institution shall meet whatever requirements apply for private schools to serve publicly placed students in that state.
- b. The district maintains documentation of such approval and makes it available to ODE upon request.

- c. The district makes contractual agreements for out-of-state placements for the provision of special education and related services when, in accordance with applicable federal and state law, the district has:
 - (1) Developed an individualized education program;
 - (2) The placement team has determined that no appropriate in-state placement options are available.
3. District Responsibility for Students Enrolled by their Parents/Guardians in Private Schools
- a. The district provides equitable services, funded by a proportionate share of federal special education funds, for resident and nonresident students with disabilities enrolled by their parents/guardians in private schools located within district boundaries. Nonresident students include children who are residents of another state.
 - b. The district consults with private school officials about procedures and services and provides child find activities, evaluations, reevaluations and eligibility determinations comparable to those provided for the district's public schools.
 - c. The district maintains in its records and provides annually to the Oregon Department of Education, a count of the number of parentally-enrolled private school students evaluated, the number found eligible and the number to whom it provides services.
4. Consultation with Representatives of Private School Students with Disabilities
- a. The district consults, in a timely and meaningful way with representatives of private schools and parents/guardians of parentally placed private school students with disabilities enrolled in private schools located within the district's boundaries.
 - b. Consultation includes:
 - (1) The child find process, including:
 - (a) How parentally-placed private school children with disabilities may participate equitably, as they do not have an individual entitlement to the same level of special education services as children enrolled in public schools; and in the child find process and how parents/guardians, teachers and private school officials will be informed of the process;
 - (b) How parents/guardians, teachers and private school officials will be informed of the process;
 - (c) How, where and by whom the special education and related services will be provided;
 - (d) The determination of the proportionate amount of federal funds available including how the amount is calculated, the proportionate share of federal funds available to serve parentally placed private school children with disabilities and how this is calculated;
 - (e) How services will be apportioned if funds are insufficient, and how and when these decisions will be made;
 - (f) A written explanation of service decisions that the district provides to officials of private schools if the district disagrees with the views of the private school officials about the services to be provided or the methods of providing these services.

- c. Written affirmation and complaint:
 - (1) The district requests a written affirmation, signed by the administrator of each private school participating in the consultation process that a timely and meaningful consultation occurred;
 - (2) If private school officials do not provide this affirmation within a reasonable period of time, the district forwards its documentation of the consultation process to the ODE;
 - (3) The district maintains documentation of its consultation process;
 - (4) The district acknowledges the right of a private school official to submit a complaint to the ODE regarding the district's implementation of these requirements. Should such a complaint occur, the district forwards to ODE appropriate documentation, including documentation of the district's consultation process.
- d. The district makes the final decisions with respect to the services to be provided to eligible private school students.
- e. Child Find for Parentally-Placed Private School Children
 - (1) The district's child find process includes all resident and nonresident parentally placed students attending private schools located within the district's boundaries.
 - (2) The district provides child find activities that are similar to, and completed within a comparable time period as child find activities for students in the district's public schools.
 - (3) The district consults with private school representatives and parents/guardians about how to implement the child find activities and how to keep parents/guardians and private school personnel informed.
 - (4) The district ensures the equitable participation of parentally placed private school students in the child find process.
 - (5) The district does not include the cost of conducting child find activities for private school students, including individual evaluations in determining whether it has spent a proportionate share of its federal Individuals with Disabilities Education Act (IDEA) funds on parentally placed private school students with disabilities.
 - (6) The district ensures an accurate count of these children is made between October 1 and December 1 of each year and uses this count in determining the amount the district spends for services in the subsequent fiscal year.

5. Provisions for serving students placed by their parents/guardians in private schools:

- a. District decisions about the services that are provided to private school students with disabilities are made throughout the consultation process and in accordance with the district's plan for service of parentally-placed private school students and their services plans.
- b. The services provided to private school students with disabilities are provided by personnel meeting the same standards as personnel providing service in the district program.
- c. The district may provide private school students with disabilities a different amount of services than students with disabilities attending public schools in the district.
- d. The district may provide services to private school students with disabilities onsite at the student's private school, including a religious school, to the extent that services can be provided in a religiously neutral setting within the private school. These services will be provided during the student's regular school day, unless stated otherwise in the student's service plan.

- e. If a parent of a private school student with a disability requests an meeting from the resident district, the resident district will either:
 - (1) Hold an IEP meeting within a reasonable time; or
 - (2) Provide the parent with prior written notice of the district's refusal to hold an IEP meeting.

6. Evaluation, Reevaluation and Eligibility of Private School Students with Disabilities

- a. The district conducts evaluations, reevaluations and eligibility determinations, in accordance with federal and state laws and regulations, for both resident and nonresident students enrolled by their parents/guardians in private schools located within district boundaries.
- b. Eligibility for special education and related services will be determined by the district in the same manner as for public school students with disabilities.
- c. The district in which the private school is located reevaluates private school students with disabilities at least every three years to determine whether the student continues to be eligible for special education, whether the student is or is not currently receiving services under a services plan.
- d. If parents/guardians who enroll a student in a private school at their own expense do not provide consent for the initial evaluation or the reevaluation, or the parent fails to respond to a request to provide consent, the district does not use due process procedures to override the lack of consent. The district does not, and is not required to, consider the child as eligible for special education services in these cases.
- e. If a parent refuses a reevaluation that is necessary to determine whether the student continues to be a student with a disability, and as a result the team cannot determine the student's continuing eligibility, the student will no longer be considered "eligible" and shall not be counted as a private school student with a disability for the purposes of the private school student count.
- f. Following an initial determination of eligibility, and upon any subsequent determination of eligibility, the district will notify the parent in writing that the resident district will make a free appropriate public education available to the student if the student is enrolled in a district program, and conducts a meeting to develop, review or revise the students services plan.
- g. If the parent does not choose to remove the child from private school to enroll in a district public school, the district initiates and conducts a meeting to develop, review or revise the student's services plan, consistent with the procedures for IEP meetings and timeline and in light of the service provision the district has determined through the consultation process.
- h. The district in which the private school is located does not release evaluation and eligibility determination information or other personally identifiable information to the student's resident district without written parental consent, unless parents/guardians seek enrollment in the student's resident district and the resident district requests records.

7. Services Plan

- a. If a student with a disability is enrolled by a parent in a private school the district offers a services plan.
- b. The district ensures that the services plan describes the specific special education and related services the district will provide to the student in light of the services that have been determined through the consultation process.

- c. The district convenes individual meetings to develop, review and revise the services plan consistent with procedures for IEP team membership, parent participation and IEP content, to the extent appropriate.
- d. The district ensures that a representative of the private school attends each meeting. If the representative cannot attend, the district will use other methods to ensure participation by the private school, including individual or conference telephone calls.
- e. The district is not required to provide transportation from the student's home to the private school. If necessary for the student to benefit from or participate in the services provided by the district the district must provide transportation:
 - (1) From the student's school or the student's home to a site other than the private school; and
 - (2) From the service site to the private school, or to the student's home, depending on the timing of the services.

8. Property, Equipment and Supplies

- a. The district keeps title to and exercises continuing administrative control of all property, equipment and supplies that the district acquires with IDEA funds for the benefit of private school students with disabilities.
- b. The district may place equipment and supplies in a private school for a period of time needed to implement the service plan of a private school student with disabilities or for child find purposes.
- c. The district ensures that the equipment and supplies placed in a private school:
 - (1) Are used only for implementation of special education activities; and
 - (2) Can be removed from the private school without remodeling the private school facility.
- d. The district removes equipment and supplies from a private school if:
 - (1) The equipment and supplies are no longer needed for special education activities, programs or services; or
 - (2) The district determines removal is necessary to avoid unauthorized use of the equipment and supplies.
- e. The district does not use IDEA funds for repairs, minor remodeling or construction of private school facilities.

9. Separate Classes Prohibited

The district does not use IDEA funds for classes that are organized separately on the basis of school enrollment or religion of the students if:

- a. The classes are at the same site; and
- b. The classes include students enrolled in public school programs and students enrolled in private schools.

10. Funds and Property Not to Benefit Private Schools

- a. The district will not use IDEA funds to finance the existing level of instruction in a private school or to otherwise benefit the private school.

- b. The district will use IDEA funds to meet the special education needs of students enrolled in private schools, but not for:
 - (1) The needs of a private school; or
 - (2) The general needs of the students enrolled in the private school.

11. Use of School Personnel

- a. The district may use IDEA funds to make public school personnel available in other than public facilities:
 - (1) To the extent necessary to implement any of the requirements related to private school students with disabilities; and
 - (2) If those services are not normally provided by the private school.
- b. The district may use IDEA funds to pay for the services of an employee of a private school to provide services to private school students if:
 - (1) The employee performs the services outside of his/her regular hours of duty; and
 - (2) The employee performs the services under public supervision and control.

12. Federal Funds Available for Services

- a. The district calculates a proportionate share of federal funds available to provide special education and related services to private school students with disabilities using the formula specified in the IDEA.
- b. If the district does not expend the proportionate share of funds by the end of the fiscal year, the district obligates the remaining funds to be used in the following year.
- c. The district does not include child find expenditures in determining whether the district has met its expenditure requirements for parentally placed private school students, but may include the cost of transportation required for students to access required special education services.
- d. The district does not supplant the proportionate amount of federal funds required to be expended for parentally placed private school students.

DELETE

Code: **IGBAI-AR**

Adopted: 4/1/00

Revised/Readopted: 3/7/06,

7/17/06 3/4/08

Special Education - Private Schools

District-Placed Private School Students

1. Obligations of District

- a. The District may contract with private schools that have been approved by ODE as contractors for the provision of special education services.
- b. The District ensures that every student with a disability who is placed in or referred to a private school or facility by the District as a means of providing special education and related services:
 - (1) Receives education and services that constitute a free appropriate public education in the least restrictive environment at no cost to the parent/guardian;
 - (2) Is provided an education that meets the standards that apply to education provided by the public agency; and
 - (3) Has all of the rights of a student with a disability who is served by the public agency.
- c. The District ensures that all applicable federal and state requirements relating to the evaluation, eligibility, IEP development, placement and procedural safeguards are followed when determining whether the student will be placed in an approved private school for special education services.
- d. The District initiates and conducts an IEP meeting that includes a representative of the approved private school. An IEP is developed based upon the needs of the student before determining placement of a student with a disability in an approved private school.
- e. If a representative of the approved private school is unable to attend the IEP meeting, the District uses other methods to ensure participation including, but not limited to, individual or conference telephone calls or individual meetings;
- f. After the District initially places a student in an approved private school, any subsequent meetings to review or revise an IEP are the responsibility of the District;
- g. The District may request by written agreement that the approved private school initiate and conduct IEP meetings to review and revise an IEP. If the approved private school initiates and conducts these meetings, the District will ensure that the parent/guardian and a representative of the District:
 - (1) Are involved in any decision about the student's education program; and
 - (2) Agree to any proposed changes in the program before those changes are implemented.
- h. The District conducts IEP and placement meetings following the same requirements as for students attending schools in the District.

- i. The District provides all procedural safeguards to the parent/guardian of students placed in approved private schools.
 - j. The District ensures that transportation to and from the approved private school is provided at no cost to the parent/guardian.
2. Out-of-State Placements for Special Education
- a. The District maintains documentation of approval, by the Oregon Department of Education (ODE) for any out-of-state programs that provide special education to District students eligible for special education.
 - b. Contractual arrangements for out-of-state special education services will be made only after:
 - (1) An IEP has been developed;
 - (2) It has been determined that no appropriate in-state placement options are available.

Parentally-Placed Private School Students

1. Consultation with Representatives of Private School Students with Disabilities
- a. The District consults, in a timely and meaningful way, with representatives of private schools and the parent/guardian of parentally placed private school students with disabilities during all phases of the development and design of the special education services to be provided to them.
 - b. Consultation includes:
 - (1) The equitable participation of parentally placed private school children in the Child Find process and how parent/guardian, teachers, and private school officials will be informed of the process;
 - (2) How the process will operate throughout the school year to ensure meaningful participation of children identified through child find in special education and related services;
 - (3) How, where, and by whom the special education and related services will be provided;
 - (4) The determination of the proportionate amount of federal funds available including how the amount is calculated;
 - (5) How services will be apportioned if funds are insufficient, and how and when these decisions will be made;
 - (6) That the District provides a written explanation to the private school if the District disagrees with the views of the private school regarding types and provision of services.
 - c. Written Affirmation and Complaint
 - (1) The District will seek to obtain a written affirmation, signed by the representatives of participating private schools, that a timely and meaningful consultation occurred;
 - (2) If private school representatives do not provide this affirmation within a reasonable period of time, the District will forward its documentation of the consultation process to the state.
 - (3) A private school official has the right to submit a complaint to the state that the District did not engage in timely and meaningful consultation as defined.

- d. The District makes the final decisions with respect to the services to be provided to eligible private school students. (District plan attached.)

2. Child Find for Parentally-Placed Private School Children

- a. The District's Child Find process includes all parentally placed students attending private schools located in the District, without regard to the student's resident district;
- b. The District shall maintain in its records and provide to the Oregon Department of Education, the number of private school children:
 - (1) Evaluated;
 - (2) Determined to be children with disabilities; and
 - (3) Served by the District.
- c. The District provides child find activities that are similar to and completed within a comparable time period as child find activities for students within the District's public schools.
- d. The District consults with private school representatives and parent/guardian about how to implement the child find activities and how to keep the parent/guardian and private school personnel informed.
- e. The District ensures the equitable participation of parentally placed private school students in the child find process.
- f. The District does not include the cost of conducting child find activities for private school students, including individual evaluations, in determining whether it has spent a proportionate share of its federal IDEA funds on parentally placed private school students with disabilities.
- g. The District ensures an accurate count of these children is made as of December 1 of each year and uses this count in determining the amount the District spends for services in the subsequent fiscal year.

3. Provisions for Serving Students Placed by Their Parent/Guardian in Private Schools

- a. District decisions about the services that are provided to private school students with disabilities are made through the consultation process and in accordance with the District's plan for serving parentally-placed private school students and their service plans.
- b. The services provided to private school students with disabilities are provided by personnel meeting the same standards as personnel providing services in the District program.
- c. The District may provide private school students with disabilities a different amount of services than students with disabilities attending public schools in the District.
- d. The District may provide services to private school students with disabilities onsite at the student's private school, including a religious school, to the extent that services can be provided in a religiously neutral setting within the private school. These services will be provided during the student's regular school day, unless stated otherwise in the student's service plan.
- e. If a parent/guardian of a private school student with a disability requests an IEP meeting from the resident district, the resident district will either:
 - (1) Hold an IEP meeting within a reasonable time; or

- (2) Provide the parent/guardian with prior written notice of the District's refusal to hold an IEP meeting.

4. Evaluation, Reevaluation and Eligibility of Private School Students with Disabilities

- a. The District ensures that all requirements for evaluation, reevaluation and eligibility that apply to public school students with disabilities will be met with regard to evaluations for private school students who are suspected of having a disability.
- b. Eligibility for special education and related services will be determined by the District in the same manner as for public school students with disabilities.
- c. The District will reevaluate private school students with disabilities at the same intervals as students in public schools to determine whether the student continues to be eligible for special education, whether or not the student is receiving services under a services plan.
- d. If a parent/guardian refuses an evaluation that is necessary to determine a student's eligibility, continuing eligibility or present level of performance for developing a service plan, the District will notify the parent/guardian in writing that it is prepared to complete the necessary evaluations upon parent/guardian consent or if the parent/guardian enrolls the student in a District program.
- e. If a parent/guardian refuses a reevaluation that is necessary to determine whether the student continues to be a student with a disability, and as a result the team cannot determine the student's continuing eligibility, the student will no longer be considered "eligible" and shall not be counted as a private school student with a disability for the purposes of the private school student count.
- f. Upon an initial determination of eligibility, and upon any subsequent determination of eligibility, the District will notify the parent/guardian in writing that the resident district will make a free appropriate public education available to the student if the student is enrolled in a school District program and is a resident of the District.

5. Service Plans

- a. If a student with a disability is enrolled by a parent/guardian in a religious or other private school and will receive special education or related services from the District, the District will:
 - (1) Initiate and conduct meetings to develop, review and revise a service plan for the student consistent with the procedures for IEP meetings and timelines; and
 - (2) Ensure that a representative of the religious or other private school attends each meeting. If the representative cannot attend, the District will use other methods to ensure participation by the private school, including individual or conference telephone calls.
- b. The services plan will describe the specific special education and related services that the District will provide to the student in light of the services that the District has determined, through the consultation process, it will make available to private school students with disabilities.
- c. The services plan will, to the extent appropriate:

- (1) Meet requirements for IEP content with respect to the services provided; and
 - (2) Be developed, reviewed and revised consistent with procedures for IEP team membership and parent/guardian participation.
- d. The District is not required to provide transportation from the student's home to the private school.
 - e. If necessary for the student to benefit from or participate in the services provided by the public agency, a private school student with a disability will be provided transportation:
 - (1) From the student's school or the student's home to a site other than the private school; and
 - (2) From the service site to the private school, or to the student's home, depending on the timing of the services.
6. Property, Equipment and Supplies
- a. The District keeps title to and exercises continuing administrative control of all property, equipment and supplies that the District acquires with IDEA funds for the benefit of private school students with disabilities.
 - b. The District may place equipment and supplies in a private school for a period of time needed to implement the service plan of a private school student with disabilities or for child find purposes.
 - c. The District ensures that the equipment and supplies placed in a private school:
 - (1) Are used only for implementation of the service plan or for child find activities; and
 - (2) Can be removed from the private school without remodeling the private school facility.
 - d. The District will remove equipment and supplies from a private school if:
 - (1) The equipment and supplies are no longer needed for the purposes identified in b. above; or
 - (2) Removal is necessary to avoid unauthorized use of the equipment and supplies.
 - e. The District will not use IDEA funds for repairs, minor remodeling or construction of private school facilities.
7. Separate Classes Prohibited
- a. The District will not use IDEA funds for classes that are organized separately on the basis of school enrollment or religion of the students if:
 - (1) The classes are at the same site; and
 - (2) The classes include students enrolled in public school programs and students enrolled in private schools.
8. Funds and Property Not to Benefit Private Schools

- a. The District will not use IDEA funds to finance the existing level of instruction in a private school or to otherwise benefit the private school.
- b. The District will use IDEA funds to meet the special education needs of students enrolled in private schools, but not for:
 - (1) The needs of a private school; or
 - (2) The general needs of the students enrolled in the private school.

9. Use of School Personnel

- a. The District may use IDEA funds to make public school personnel available in other than public facilities:
 - (1) To the extent necessary to implement any of the requirements related to private school students with disabilities; and
 - (2) If those services are not normally provided by the private school.
- b. The District may use IDEA funds to pay for the services of an employee of a private school to provide services to private school students if:
 - (1) The employee performs the services outside of his/her regular hours of duty; and
 - (2) The employee performs the services under public supervision and control.

10. Expenditures for Parentally-Placed Private School Students

- a. The District uses the following formulas for determining funds available for provision of special education and related services to private school students with disabilities.
- b. In providing special education and related services to school-age private school students with disabilities, the District will spend an amount that is the same proportion of the District's total subgrant of IDEA funds as the number of school-age private school students with disabilities attending private schools in its jurisdiction is to the total number of school-age students with disabilities in its jurisdiction. In calculating the proportionate amount of federal funds, the District after timely and meaningful consultation with representatives of private schools, shall conduct a thorough and complete child find process to determine the number of parentally placed children with disabilities attending private schools located in the District.
- c. The District uses the student count to determine the amount that the District will spend on providing special education and related services to private school students with disabilities in the next fiscal year.
- d. The District will not consider expenditures for child find activities in determining whether the school District has met its expenditure requirements for parentally-placed private school students.
- e. The District may include the cost of transportation in determining whether the school District has met its expenditure requirements for parentally-placed private school students.

Process to Determine Special Education Services Provided by the District to School-age Students who are Parentally Placed in Private Schools within its Jurisdiction

A meeting is convened in the fall of each school year. The director, or representative, from each private school within the District's attendance boundary is invited. The meeting is jointly facilitated by a special education administrator and an administrator, or designee, who is knowledgeable regarding Title services.

From the perspective of the Special Education Department, the purpose of the meeting is to:

- provide an overview of IDEA 2004 requirements (see attached sample agenda from the Oregon Department of Education);
- consult with attendees regarding the identification and provision of services to students; and
- receive assistance with identification of nonresident students who are eligible for special education services and who are parentally placed in a private school within the District.

For private school representatives who cannot attend the meeting, an alternative venue for communication of this information and consultation (including individual or group meetings, phone conversations, or other strategies) will be provided.

A similar opportunity for consultation will be provided to a group of parent/guardian representatives.

Based on input from private school representatives and parent/guardian representatives, the decision regarding types of services and service delivery mechanisms will be made by the special education administration and confirmed in writing to private school directors.

Directors of private schools will be asked to provide written confirmation that the prescribed consultation occurred, as required by IDEA 2004 (see attached sample document entitled "Affirmation of Consultation with Private school" from the Oregon Department of education).

7/6/06

SAMPLE FORM
Affirmation of Consultation with Private School

Special Education Services for parentally Placed Private School Students.

IDEA 2004 requires school Districts to engage in timely and meaningful consultation with representatives of private schools and with the parent/guardian about the provision of special education and related services for parentally placed private school students attending private schools within the District's Jurisdiction. The consultation process must include specific discussion of the following topics:

IDEA 2004 requires that school District's ask private school officials to provide written affirmations of a satisfactory consultation process. Private school officials are not required to provide a written statement if they believe the process to be unsatisfactory.

Consultation may include individual or group meetings, interviews, or other effective and efficient strategies. The law does not require use of a specific strategy.

- a. The child find process, including how resident and non-resident students suspected of having a disability can participate equitably. Child find includes evaluations, eligibility determinations, and reevaluations.
- b. How parents, teachers, and private school officials will be informed of the child find process;
- c. The determination of the proportionate amount of federal funds to be expended and how the proportionate share was calculated;
- d. The consultation process and how the consultation process will operate through the year to ensure that students identified through the "child find process" can meaningfully participate in special education and related services;
- e. How, where, and by whom special education and related services will be provided, including a discussion of types of services and services delivery mechanisms;
- f. How such services will be apportioned if funds are insufficient to serve all students, and how and when these decisions will be made;
- g. How, if the District disagrees with the views of the private school officials about the provision of services or the type of services, the District shall provide a written explanation of the reasons why the District chose not to provide services.

I, the undersigned authorized representative of

Name of Private School

Affirm that timely and meaningful consultation about items a-g above occurred with

(Name of School District)

<i>Printed/Typed Name and Title of Authorized Representative of the Private School:</i>	
<i>Signature:</i>	<i>Date:</i>

SAMPLE FORM

**Agenda/Notes
Date/Time/Place**

**Private School Consultation
Special Education and Related Services for parentally Placed Private School Students**

Participant Name/Position	Organization	Signature

Item	Discussion Points	Action
Introductions and Agenda Review		
Overview of IDEA 2004 Requirements: Special Education Services for Parentally Placed Private School Students		
1. CHILD FIND PROCESS <ul style="list-style-type: none"> • Activities • Timelines • Equitable Participation 		
2. AVAILABLE IDEA FUNDS <ul style="list-style-type: none"> • Determining Proportionate Share • IDEA Funds Available for 2007-2008 		
3. CONSULTATION PROCESS <ul style="list-style-type: none"> • Basic Requirements • Operation throughout the year • Affirmation by private school officials 		
3. DECISIONS about PROVIDING SERVICES <ul style="list-style-type: none"> • What Services • How and where • By whom • Service delivery mechanism (contract; direct service) 		
5. DECISIONS ABOUT SERVICES WHEN FUNDS ARE INSUFFICIENT to SERVE ALL IDENTIFIED STUDENTS <ul style="list-style-type: none"> • Apportionment of Services • How and when decisions will be made 		
6. RESOLVING DIFFERENCES BETWEEN DISTRICT and PRIVATE SCHOOL OFFICIALS <ul style="list-style-type: none"> • When District must provide written explanations to private school officials about services to be provided • Opportunities for dispute resolution under IDEA 		
7. Other topics (e.g. referrals for evaluation)		

w/Edits

Code: IGBAJ-AR

Revised/Readopted : 3/4/08, 3/7/06

Special Education - Free Appropriate Public Education (FAPE)**

1. FAPE and Age Ranges

The district provides special education and related services to all resident school-age students with disabilities, including students with disabilities who are enrolled in public charter schools located in the district except as provided below.

- a. "School-age children" are children who have reached 5 years of age but have not yet reached 21 years of age on or before September 1 of the current school year.
- b. The district will admit an otherwise eligible student who has not yet reached 21 years of age on or before September 1 of the current school year.
- c. An otherwise eligible person whose 21st birthday occurs during the school year will continue to be eligible for FAPE for the remainder of the school year.
- d. The district provides FAPE to students with disabilities who have been suspended or expelled from school in accordance with the special education discipline rules.

2. Nonacademic Services

- a. The district provides equal opportunity for students with disabilities for participation in nonacademic and extracurricular services and activities.
- b. Nonacademic and extracurricular services and activities may include meals, recess periods, counseling services, athletics, transportation, health services, recreational activities, special interest groups or clubs sponsored by the district, referrals to agencies and employment of students, including both employment by the district and assistance in making outside employment available.
- c. The district ensures that each child with a disability participates with nondisabled children in the extracurricular services and activities to the maximum extent appropriate to the needs of each individual child.

3. ~~Interagency Agreements~~

- ~~a. The district will enter into a written agreement with any ESD, other district, School for the Deaf, School for the Blind or approved private school that serves as an attending program for resident students with disabilities through placement by the District.~~

- b. ~~The district will enter into a written agreement with any ESD, other district or private alternative school that serves resident students through placement by the District, whether or not the students are identified as students with disabilities.~~
- c. ~~These written agreements provide that:~~
 - 1) ~~The resident district retains all responsibility for ensuring provision of FAPE and that the parent/guardian and student are afforded all special education rights and procedural safeguards under federal and state law, including:~~
 - a) ~~Child find and initial evaluation if the resident district suspects that the child has a disability and needs special education;~~
 - b) ~~Initiation of individualized education program (IEP) meetings, unless the written agreement specifies that the attending district will initiate IEP meetings;~~
 - c) ~~Provision of District representative at IEP meetings;~~
 - d) ~~Provision of IEP and placement that comply with all state and federal requirements;~~
 - e) ~~Provision of prior written notice and notice of procedural safeguards when required;~~
 - f) ~~Compliance with any stay put requirements that allow the student to remain in the present educational placement in the attending program unless the resident district and the parent/guardian agree otherwise; and~~
 - g) ~~Acting as the school district of record for any special education due process hearing arising out of the student's placement or program.~~
 - 2) ~~The attending program agrees to:~~
 - a) ~~Allow the student to remain in the present educational placement in the attending program during the pendency of any special education due process hearing unless the parent/guardian and resident district agree otherwise;~~
 - b) ~~Immediately notify the resident district superintendent or special education director if the attending program suspects that the student may have a disability and need special education services;~~
 - c) ~~Immediately notify the resident district superintendent or special education director if the student, whether disabled or not, has engaged in conduct that may lead to suspension or expulsion; and~~
 - d) ~~Immediately notify the resident district superintendent or special education director of any complaint made by the parent/guardian regarding the student's regular or special education program at the attending program.~~

3. Graduation

- a. A student who receives a regular high school or modified diploma is no longer entitled to FAPE.
- b. If the district chooses to provide special education to a student with a regular high school diploma, that student remains eligible for FAPE.

- c. The district provides prior written notice a reasonable time before a student with a disability graduates with a regular high school or modified diploma.
- d. The district may, but is not required to, conduct a reevaluation before terminating eligibility due to graduation with a regular high school or modified diploma.
- e. The district may award an alternative document as described in Board policy to a student with a disability. (See Board policy IKF - Graduation Requirements) Graduation with an alternative document does not terminate eligibility, or require an evaluation or written prior notice.
- f. The district may, but is not required to, provide special education and related services to a student who has graduated with a regular or modified diploma.

4. Incarcerated Youth

- a. The district makes FAPE available to those individuals with disabilities 18 through 21 years old who have been convicted as adults and are incarcerated in an adult correctional facility who have not graduated with a regular diploma, and in their last educational placement before their incarceration in the adult correctional facility:
 - 1) Were identified as being a student with a disability as defined in Oregon Administrative Rule (OAR) 581-015-~~0005~~(3) 2000; or
 - 2) Had an individualized education program.
- b. The district's provisions of FAPE does not include:
 - 1) The requirements relating to participation of children with disabilities in statewide and district assessments.
 - 2) Requirements relating to transition planning and transition services, with respect to the students whose eligibility will end, because of their age, before they will be eligible to be released from adult correctional facilities based on consideration of their sentence and eligibility for early release.
 - 3) The IEP team may modify the student's IEP or placement if the state has demonstrated a bona fide security or compelling penological interest that cannot otherwise be accommodated. Least-restrictive environment requirements do not apply with respect to these modifications.
 - 4) The public agency responsible for the special education of students in an adult correctional facility is not required to provide notice of meetings to the parent/guardian after rights transfer to the student.
- c. "Identified as being a student with a disability" means has been determined eligible or was involved in the process of determining the individual's disability and eligibility for special education and related services under OAR 581-015-~~0051~~ 2120.
- d. "Last educational placement" includes juvenile correctional facilities.

5. Residential Placement

If the district places a student in a public or private residential program to provide special education and related services to a student with a disability, the district ensures that the program,

including non-medical care and room and board, is provided at no cost to the parent/guardian of the student.

6. Physical Education

- a. The district provides physical education services, specially designed if necessary, to each eligible student.
- b. The district provides the opportunity to participate in the regular physical education program available to nondisabled students unless the student is enrolled full-time in a separate facility or the student needs specially designed physical education.
- c. If specially designed physical education is prescribed in a student's IEP, the district will provide the services directly or make arrangements for them to be provided by other agencies or programs.
- d. The district ensures that physical education is provided for eligible students enrolled in separate facilities, if the district is responsible for the education of such students.

7. Public Charter Schools

- a. ~~The District ensures that all procedural safeguards are afforded to resident students with disabilities who attend public charter schools and their parent/guardian whether or not the charter school is chartered by the District. The district serves children with disabilities attending public charter schools located in the district in the same manner and in accordance with applicable laws and rules governing the district's provision of services to children with disabilities in its other schools.~~
- b. The district ensures that all resident students who attend charter schools located in the district receive FAPE. ~~whether or not the charter school is chartered by the District.~~
- ~~c. The District is responsible for providing any required special education and related services to resident public charter school students identified as students with disabilities under the IDEA whether or not the charter school is chartered by the District.~~
- ~~d. The District treats charter schools the same as other schools in the District regarding provision of on-site services. The specific arrangements for providing special education and related services to charter schools within the District will be described in the charter between the District and the charter school.~~
- ~~e. The district ensures that IEP and placement decisions for students with disabilities are made by the student's IEP/placement team.~~
- c. The district shall, in consultation with the student's parent, guardian or person in parental relationship, provide FAPE to the student, in accordance with Oregon Administrative Rule (OAR) 581-015-2230(1), until the district implements the IEP from the previous district or develops, adopts and implements a new IEP that meets acceptable requirements. If the information received was in effect in a previous district in another state, the district will implement the IEP in accordance with OAR 581-015-2230(2).
- d. The district provides supplementary and related services onsite at a district public charter school to the same extent to which the district has a policy or practice of providing such services on the site to its other public schools.

- e. A school district in which a public charter school is located must provide individuals with the school district provides those funds to other public schools in the district, including proportional distribution based on relative enrollment of children with disabilities, at the same time as funds are distributed to other public schools in the district.
- f. If a child with a disability enrolls in a public charter school, the public charter school is considered the school the child would attend if not disabled. Enrollment in any public charter school is by parent choice. Enrollment in any out-of-district public charter school does not require an interdistrict transfer agreement.

When a student enrolls in a public charter school, the district in which the public charter school is located shall:

- a. Provide written notification of the student’s enrollment to the district in which the student resides;
- b. Request, in accordance with applicable confidentially provisions in state and federal laws, the records of the student, including all information related to an individualized education program developed for the student;
- c. Provide written notification to the student’s parent, guardian or person in parental relationship to provide information about:
 - (1) The district’s responsibility to identify, locate and evaluate to determine a student’s need for special education and related services and to provide those special education services in the public charter school; and
 - (2) The methods by which the district may be contacted to answer questions or provide information related to special education and related services.

When a student no longer is enrolled in a public charter school for any reason other than graduation, the district in which the public charter school is located shall notify;

- a. The district in which the student resided to provide notice:
 - (1) That the student no longer is enrolled in the public charter school; and
 - (2) That the district will provide the student education records including all information related to the student’s IEP if the student seeks enrollment or services from the district in which the student resides.
- b. The student’s parent, guardian or person in parental relationship to provide information about:
 - (1) The responsibility of the school district in which the student resides to identify, locate and evaluate students and implement services
 - (2) The methods by which the student’s resident district may be contacted to answer questions or provide information about special education and related services; and
 - (3) The responsibility of the district to provide student records, including information related to the student’s IEP, if the student seeks enrollment or services from another district, including the parent’s resident district.

8. Misclassified Students

- a. The district ensures that students identified on the special education child count under Part B of the Individuals with Disabilities Education Act (IDEA) are limited to students who:
 - 1) Meet eligibility requirements under OAR 581-015-~~0051~~ 2120 to 2180;
 - 2) Have a current IEP that is being implemented;
 - 3) Are receiving a free appropriate public education FAPE;
 - 4) Are enrolled in the district.

~~10. Students with Disabilities Covered by Public Insurance~~

~~With regard to services required to provide FAPE to a student with disabilities, the District:~~

- ~~a. Will not require a parent/guardian to sign up for or enroll in public insurance programs in order for their student with disabilities to receive FAPE under Part B of the IDEA;~~
- ~~b. Will not require parent/guardian to incur an out-of-pocket expense in order for their student with disabilities to receive FAPE under Part B of the IDEA; and~~
- ~~c. Will not use the student's benefits under a public insurance if that use would:
 - ~~1) Decrease available lifetime coverage or any other insured benefit;~~
 - ~~2) Result in the family paying for services that would otherwise be covered by the public insurance program and that are required for the student outside the time the student is in school;~~
 - ~~3) Increase premiums or lead to the discontinuation of insurance; or~~
 - ~~4) Risk the loss of eligibility for home and community based waivers, based on aggregate health-related expenditures.~~~~

~~11. Students with Disabilities Covered by Private Insurance~~

- ~~a. Each time the District proposes to access a parent/guardian private insurance proceeds, the District will:
 - ~~1) Obtain parent/guardian consent (as defined in OAR 581-015-0039); and~~
 - ~~2) Inform the parent/guardian that their refusal to permit the District to access the private insurance does not relieve the District of its responsibility to ensure that all required services are provided at no cost to the parent/guardian.~~~~
- ~~b. The District may use its IDEA Part B funds for a specified service required to ensure FAPE if the District is unable to obtain consent to use a child's private insurance.~~
- ~~c. If the parent/guardian would incur a cost for the District's use of private insurance, the District may use its Part B funds to pay the cost the parent/guardian otherwise would have to pay to use the private insurance (e.g. the deductible or co-pay amounts).~~

9. Student with Disabilities under IDEA Enrolled in Public Benefits or Insurance.

A district may use the state’s Medicaid or other public benefits or insurance programs in which a child participates to provide or pay for special education and related services required under IDEA, and permitted under the public benefits or insurance programs as specified below.

With regard services required to provide FAPE to a child with disabilities under IDEA, a district;

a. May not require parents to sign up for or enroll in public benefits or insurance programs in order for their child with disabilities to receive FAPE under the IDEA, but may pay the cost that the parent otherwise would be required to pay; and

b. May not use the child’s benefits under a public insurance program if that use would:

(1) Decrease available lifetime coverage or any other insurance benefit;

(2) Result in the family paying for services that would otherwise be covered by the public benefits or insurance program, and that are required for the child outside of the time the child is in school.

(3) Increase premiums or lead to the discontinuation of insurance; or

(4) Risk loss of eligibility for home and community-based waiver, based on aggregate health-related expenditures; and

Prior to accessing a student’s or parent’s public benefits or insurance for the first time, and annually thereafter, the district must provide prior written notification to the student’s parents and must obtain written consent¹ that:

a. States the personally identifiable information that may be disclosed (e.g. records or information about the services that may be provided to the student);

b. State the purpose of the disclosure (e.g. billing for services under IDEA);

c. Names the agency to which the disclosure may be made (e.g. Medicaid);

d. Specifies that the parent understands and agrees that the public agency may access the parent’s or student’s public benefits or insurance to pay for services under IDEA;

e. Acknowledges the district may not require parents to incur an out-of-pocket expense (i.e. payment of a deductible or co-payment incurred in filing a claim for special education or related services), but may pay the cost that the parent otherwise would be required to pay; and

f. Acknowledges the district may not use the student’s benefits under a public insurance program, if that use would:

(1) Decrease available lifetime coverage of any other insured benefit;

(2) Result in the family paying for services that would otherwise be covered by the public benefits or insurance program and that are required for the student outside of the time the student is in school;

(3) Increase premiums or lead to the discontinuation of insurance; or

¹ “Consent” means that the parent or adult student 1) has been fully informed, in his/her native language or other mode of communication, of all information relevant to the activity for which consent is sought and b) understands and agrees in writing to the carrying out of the activity for which his/her consent is sought. Consent is voluntary of the part of the parent and meeting the requirements of consent provisions for OAR 581-015-2090, IDEA and Family Education Rights and Privacy Act (FERPA).

(4) Risk loss of eligibility for home and community-based waivers, based on aggregate health-related expenditures.

10. Accessible Materials

a. Districts must ensure the timely provision of print instructional materials, including textbooks that comply with the National Instructional Materials Accessibility Standards (NIMAS) for students who are blind or print disabled.

b. Districts must ensure the timely provision of instructional materials in accessible formats to children who need instructional materials in accessible formats, including those children who are not blind or print disabled.

14. Extended School Year (ESY) services as per administrative regulations, Special Education – Individualized Education Program (IEP) – IGBAF-AR.

15. Assistive technology devices or services as per administrative regulations, Special Education - Individualized Education Program (IEP) – IGBAF-AR.

EDITS

Code: IGBAL-AR

Revised/Readopted: 3/7/06

Special Education - Services for Home-Schooled Students with Disabilities

1. Home Schooling for Students with Disabilities
 - a. When the district is informed that a resident student with disabilities is home schooled, the district provides written notice to the parent that it stands ready to provide a free appropriate public education if the student enrolls in the district.
 - b. The district offers and documents to the parent an individualized education program (IEP) meeting to consider providing special education and related services to the student with a disability in conjunction with home schooling.
 - c. The district provides an annual written notice that it stands ready to provide a free appropriate public education if the student enrolls in the district as long as:
 - (1) The student remains eligible for special education;
 - (2) The student is exempt from compulsory education as a home-schooled student; and
 - (3) The student is not receiving special education and related services from the district.
 - d. An IEP will only be developed for a student with a disability if the IEP team determines that a free appropriate public education can be provided in conjunction with home schooling. Services may be provided in the home only to the extent that special education or related services would be provided in the home if the student was not home schooled.
 - e. The student's IEP team will be convened and an IEP developed, consistent with the requirements for IEP team meetings, IEP team membership and IEP content, with the following exceptions:
 - (1) The student's parent shall be treated as both parent and regular education teacher of the student unless the parent designates another individual as the regular education teacher;
 - (2) Under "extent of nonparticipation in regular education" the IEP shall state that the student is exempt from compulsory school attendance and regular education is provided through home schooling; and
 - (3) The IEP will state how "satisfactory educational progress" will be determined for the student. A parent may use a privately developed plan (PDP) to determine satisfactory progress. If so, the IEP indicates that satisfactory progress will be determined by the PDP team, at parent request. If the student may enroll in a regular education class, pursuant to the district's policy for students who are home schooled, the IEP team includes a regular education teacher.
 - f. The district ensures that:

- (1) Students with disabilities who are home schooled are reevaluated at least every three years unless waived by mutual agreement of the parent and the district, and not more than once a year unless the parent and district agree otherwise;
- (2) If the team determines a specific evaluation is necessary to continue eligibility or to determine appropriate special education and related services for the student's IEP, and the parent refuses consent for such evaluation, or refuses to make the student available, the district will document to the parent that the district stands ready to conduct the evaluation when the parent gives consent or makes the student available;
- (3) If the district does not have sufficient evaluation information to determine eligibility or to develop an IEP, the district is not required to complete these activities. The district will provide prior written notice if the district terminates eligibility or services under these circumstances.

2. Testing and Reporting Requirements

- a. If a student with a disability is receiving IEP services from the district and the IEP includes a provision for IEP team assessment of satisfactory educational progress, the district:
 - (1) Completes the assessment; and
 - (2) Provides the parent with a copy of the results, including a summary statement indicating whether the student has made satisfactory educational progress in light of the student's age and disability.
- b. If a student with a disability is receiving IEP services in a core area of instruction, the district includes the student in statewide assessments, unless an exemption is requested by the parent/guardian.

3. Child Find

- a. If the district suspects that a home-schooled student has a disability, the district:
 - (1) Obtains parent consent for initial evaluation; and
 - (2) Conducts an initial evaluation and determines the student's eligibility to receive special education and related services.
- b. If the student is eligible, the district notifies the parent and offers an opportunity for an IEP meeting to consider initiation of special education and related services to the student with a disability.
- c. If the parent refuses consent, does not respond or refuses to make the student available, the district documents to the parent that the district stands ready to conduct the evaluation when the parent gives consent or makes the student available.

4. School Enrollment

- a. If the district permits partial enrollment of home-schooled students in its regular education program, the district will permit students with disabilities to participate to the same extent as non-disabled students, if appropriate, whether or not the student is receiving IEP services from the district.
- b. A student who is exempt from compulsory school attendance as a home-schooled student with a disability will continue to be considered an exempt home-schooled student by the district even though:
 - (1) the student receives special education and related services from the district, unless these services are the equivalent of full-time enrollment in the district; or
 - (2) or the district permits partial enrollment of home-schooled students and, pursuant to that policy, the student attends one or more regular education classes unless enrollment is the equivalent of full-time enrollment in the district.



EXECUTIVE SESSION: Legal Counsel ORS 192.660(2)(h) 6:00 – 6:15 p.m

Board Members Present:

Becky Tymchuk, Chair
Eric Simpson, Vice Chair
Anne Bryan
Susan Greenberg
Donna Tyner
Tom Colett
LeeAnn Larsen

Staff Present:

Don Grotting	Superintendent
Ginny Hansmann	Deputy Superintendent of Teaching and Learning
Carl Mead	Deputy Superintendent of Operations
Steve Langford	Chief Information Officer
Sue Robertson	Chief Human Resource Officer
Maureen Wheeler	Public Communications Officer
David Williams	Executive Administrator for Strategic Relations/Initiatives
Toshiko Maurizio	Administrator for Multilingual Programs
Josh Gamez	Chief Facilities Officer
Danielle Hudson	Administrator for Student Services
Pat McCreery	Administrator for Equity and Inclusion
Patrick Meigs	Executive Administrator for Elementary Schools
Steven Sparks	Executive Administrator for Long Range Planning
Jon Franco	Executive Administrator for High Schools and Option Programs
Camellia Osterink	District Legal Counsel
Ken Struckmeier	Executive Administrator for Middle Schools
Kathleen Skidmore	Executive Administrator for Elementary Schools
Jason Guchereau	Finance Manager
Craig Beaver	Administrator for Transportation
Jennifer Whitten	Greenway Elementary School Principal
Robin Kobrowski	Springville K-8 Elementary School Principal
Ashlee Hudson	Kinnaman Elementary School Principal
Joan McFadden	Findley Elementary School Principal

Visitors: 50

Media: 1

District Goal: WE Empower all students to achieve post-high school success.

"The District prohibits discrimination and harassment based on any basis protected by law, including but not limited to, an individual's actual or perceived race, color, religion, sex, sexual orientation, gender identity, gender expression, national or ethnic origin, marital status, age, mental or physical disability, pregnancy, familial status, economic status, veteran status, or because of a perceived or actual association with any other persons within these protected classes."

CALL MEETING TO ORDER & BOARD PROCEDURES – Becky Tymchuk

School Board Chair Becky Tymchuk called the meeting to order at 6:32 p.m. Chair Tymchuk asked for changes to the agenda, there were none.

Pledge to the Flag

Raaga Mandala led the meeting with the Pledge of Allegiance.

RECOGNITIONS

The Board recognized the following:

- Raaga Mandala was recognized for being selected as Oregon’s Kid Governor, a statewide civics program for 5th graders.

BEAVERTON STUDENT ADVISORY COMMITTEE UPDATE – Heidi Chuc and Mariam Jallow

At the last November 18, 2019 School Board meeting the BSAC had dinner with the School Board and spent some one-on-one time with Board members in their zone.

At the last BSAC meeting they had a discussion about how they wanted to impact the district. Mental health is the issue that they want to focus on. They are reaching out to peers and looking at different ways to help people. They will be meeting again this Wednesday.

BEA OSEA COMMENTS

Sara Schmitt (BEA) spoke about the power of partnerships and how it can guide us through the next few months.

She is grateful for the Student Success Act and appreciative of the process. She recently attended one of the meetings for the Mental Health High School Task Force and a Health Forum with Leslie Rodgers. At BEA they are launching a task force about social justice in hopes of strengthening some connections in our community to help facilitate some of our own practices as educators. She reminded everyone that our educators in the classroom might not see all of the partnerships that are going on and that acknowledging all our staff for the work they do is important.

Dianna Hess (OSEA) spoke about the Seasons of Sharing and how difficult the holidays are for some of our families. They have been collecting items and were able to fill an entire bus with all of the donations for our needy students/families.

PUBLIC COMMENTS

- Sarah Duncan, Early Learning TOSA thanked the Board for investing in Early Learning.
- Pavan Akkiserry spoke about the Middle School Boundary process.
- Robin Carr, Beaverton Friends of Music, thanked the Board for their commitment to a common middle school experience.
- Heather Hellman spoke about the common middle school experience and the K-8 schools moving to a K-5.
- Sandra Linehan, Five Oaks teacher, spoke about the community perception of Five Oaks with the recent issues surrounding Five Oaks and Rachel Carson.

- Nadia Hasan spoke about the recent job postings for HR and Community Involvement. She is encouraging the district to hire the most talented and capable people for these roles who also have a commitment to equity and excellence.
- Jennifer Masien advocated to the Board to provide mainstream teachers for Special Ed students.
- Justin Zoradi advocated to reinstate the Raleigh Hills K-8 program.
- Manesh (no last name) spoke about the Middle School Boundary process.
- Mark Behbehani spoke about the Middle School Boundary process.
- Aditya Kukday spoke about the Middle School Boundary process.
- Madhu Rangarajan spoke about elementary and middle schools feeding into high schools. He feels that this should be determined prior to the building of a new high school.
- Prashant Kowtal spoke about the Middle School Boundary process.
- Akhil Sharma spoke about the Middle School Boundary process.
- Paul Baker spoke about the Middle School Boundary process.
- Raleigh Hills students: Annika, Gracie, Anne and Phlox shared a petition that they collected about the Raleigh Hills K-8 transition to a K-5 school.

REPORTS

A. Superintendent Comments – Don Grotting

The meetings for the Middle School Boundary Process have been well attended by community members. The district continues to receive questions after each meeting and answers are being provided when possible.

Recently Supt. Grotting was able to accompany the Multilingual Department and Equity and Inclusion Directors to the Bilal Mosque to engage students and adults in the Student Success Act process.

The district is continuing to move forward with the transition of Raleigh Hills and Springville to K-8 schools. The transition period will be three years if enrollment at the 6-8 grade level is sufficient.

As middle school boundaries are adjusted there is an effort to align schedules and resources to provide equity and similar opportunities for all middle school students.

The mental wellness and behavior task forces are beginning to meet. The task forces represent elementary, middle and high school levels. Members include teachers, specialists, administrators and other experts in the field.

New Associate Superintendent of Business Services – the District has hired Mike Schofield as the Associate Superintendent of Business Services. Mike has had an extensive, successful career as a CFO in multiple school districts.

He attended a meeting this morning with Gov. Brown and other Superintendents to talk about Early Childhood.

B. School Board Presentations

Greenway Elementary – Jennifer Whitten

Principal Whitten has been in her position for one year. She spent the summer reviewing test data and meeting with small teams.

Greenway has received a 21st Century Grant for the next four years to provide school enrichment, summer school and kindergarten readiness academy.

Challenges – challenge with ELA and math proficiency in all sub groups and the number of students missing fewer than 10 days of school is only 57%.

Excited that this year they are a lab school with Teacher College. They receive professional development onsite from Teacher's College.

Questions/Comments:

- How many room clears have occurred each year for the past three years at Greenway? *Last year there were 31 and this year there have been four. Teams are responding quickly to prevent room clears.*
- Has the addition of a SSC helped with behavior issues? In what ways? *Yes it has helped but there is still a high need. Greenway's SSC does an amazing job but there is still need for more highly trained staff to help with students. More para educators would be helpful for positive reinforcement and to help regulate students. Being an only administrator in a building is very difficult so an additional administrator would be helpful.*
- How many years has the Pre-K been in the building? *This is the second year.* How many Pre-K students are in kindergarten this year? *Currently they have 63 students this year.*
- Interested in the learning plan. The equity area of focus, how did you come up with that? *Overall 33% of students are proficient and the rest are not. Much of it is language.*
- Applaud the high number of students feeling cared for and parents feeling like they are informed. What attributes do you see that led to this? *It's the culture of Greenway, of everyone knowing the students.*

Supt. Grotting commented that Jen has done a lot in the last year to turn the school around.

Kinnaman Elementary – Ashlee Hudson

They have a talented group of educators and very caring families. Recently they started a push at reading. Intervention teachers are doing a lot of work to connect students with books that they love.

Challenges – struggling in the area of Math across the board. They are working with math TOSA's to demonstrate lessons.

They were awarded a grant by ODE and joining 9 other schools in the state for school transformation.

Questions/Comments:

- How many room clears have occurred each year for the past three years at Kinnaman? *10 last year and three this year.*
- Has the addition of a SSC helped with behavior issues? In what ways? *Yes, they have helped. The staff is able to brainstorm and share ideas with the coach.*

- Are the severity and number of student behavior issues continuing to escalate or, with the addition of a Student Success Coach, are they declining? *Cannot tell whether there is a correlation or causation with that. They will always have a number of students moving in and out of the school with disruptive behaviors, adverse childhood experiences, ongoing trauma, etc. They have seen tremendous progress with students for this year.*
- Are there any other supports that would help students social and emotional learning? *If there was some support of safety care for all staff. More resource room teachers and psychologists would also help.*
- What does IRLA stand for as in "Review IRLA data"? *Independent Reading Level Assessment.*
- What does PCT stand for as in "Reflection on PCT implementation"? *Professional Collaboration Team.*
- What is Dare to Lead ? *Some work that is being done around strengthening the culture in the building. To inspire people to have more courageous leadership and common language.*
- Is there a particular age group that is acting out? *Absolutely, kindergarten students are having a harder time regulating. Occasionally kids that move in are having difficulty as well.*
- Third grade reading has increased 50% in the English language cohort. Is this something special or just an anomaly? *It's too early to tell. The data looks better than other grade levels. There are lots of great things going on.*

C. Financial Update – Mike Schofield

Mike reported to the School Board that the projected ending fund balance is \$21.4M. New adjustments in the working budget and year end forecast include:

1. Allocations of the Regence refund and adjustments in November 2019.
2. Increase of \$0.4M in maintenance budget for budget carryover unspent from 2018-2019.

Adjustments in the year-end forecast include an increase of \$0.5M in salary and benefits due to retiring administrators contractual vacation payouts.

Questions/Comments:

- Where are the vacation payouts coming from, is this something new? *No, it is not something new but it has not been budgeted in the past. This year there may be more based on recent legislation that has passed.*
- Do we have a similar number of retirees for certified and classified staff? *Not sure of at this time.*
- What kind of process did you go through to discover this? *By looking at variances from month to month we saw that this month was higher.*
- Are there checks and balances that the Board can help with? *Again, looking at the variances from month to month.*
- Since we have a deficit how do we go about making those adjustments? *There will have to be some changes moving forward. The Business Department will be focusing on the deficit right away so they can focus on the investment of the Student Success Act dollars.*

D. Middle School Boundaries Adjustment Project Update – Steven Sparks

After a six week open recruitment period, Supt. Grotting appointed a Citizen Advisory Committee comprised of 17 community members. Each of the eight existing Middle Schools have two community members who reside within the schools' attendance boundary. The committee also has one representative from the Student Advisory Committee. The committee has held three public meetings. The group has been participating in mapping workshop exercises and they have many ideas proposed by the community to review.

Questions/Comments:

- What was the process to appoint committee members? *They have a very diverse representation on the committee. It was a six-week process, reaching out to schools, at PTC meetings and through all other communication avenues. For most of the middle schools they only received two applicants. For Stoller they received five and Cedar Park received 12. They reviewed all applications and capped it at two per middle school.*
- Has everyone been educated on policy JC and Board objectives? *Yes, it is apparent at all meetings. Learning from the high school process, community members did not like that there was a “kick off” map in the beginning. For this process the first phase is where the community is sharing what they think the boundaries should be.*
- Do you think we will be able to work through the process with our timeline? *If we need more time the advisory team will need to say so.*
- Board objectives and permanent capacity, remind us of what the definition is? *It is the permanent structure, it does not include portables.*

E. Student Success Act HB3427 – Maureen Wheeler, Ginny Hansmann & David Williams

The District’s work on the Student Success Act continues to move forward. Phase I of the community engagement has closed. Over 4,000 survey responses were submitted representing a wide range of community interests. The District is working with Northwest Regional ESD to analyze the responses and provide a summary that will be used in the next phase of work. The feedback gathered was used to inform the district’s Continuous Improvement Plan (CIP).

In Phase II the district will convene a series of expert panels that will review the District’s CIP, Strategic Plan, and student achievement data, overlay it with the feedback gathered in the community needs assessment work and align it with the requirements of the Student Investment Account. The draft plan will be reviewed and refined by convenings of representative demographic groups. The final draft will then be presented to the community and the district will engage in another round of broad based community engagement for additional feedback in two areas, social emotional and equity.

ACTION ITEMS

A. Comprehensive Annual Financial Report/Audit Committee Presentation – Rob Drake & Jason Guchereau

Rob Drake, Audit Committee Chair, reported that the BSD staff once again did an outstanding job this year on the Comprehensive Annual Financial Report. He thanked School Board members for their service. Oregon law requires that schools complete an outside audit review. Beaverton’s budget is one of the more complex budgets. It is a very transparent document.

When they meet with the independent auditor every year they speak with the auditor privately with no staff present and Rob has a separate conversation with them as well. They were not uncomfortable with that shortfall situation. That is a different situation as long as the funds are identified.

Questions/Comments:

- How do we have a clean budget when we had a shortfall? *When they meet with the independent auditor every year they speak with the auditor privately with no staff present and Rob has a separate conversation with them as well. They were not uncomfortable with that shortfall situation. That is a different situation as long as the funds are identified. The CAFR is*

the annual report that shows how much was spent as an audited document, looks at the procedures, how you are tracking funds, cash handling and cross checking. They ensure that reliable internal and budgetary controls are followed in the daily operations of the district.

- Is there anything in the notes in the CAFR that takes a look at the report that Jim Scherzinger shared in October? *The CAFR is a very regulated document in what can and cannot be included in the notes. There is a little bit of discussion but the majority is in Jim's report presented to the School Board in October.*

LeeAnn Larsen made the motion to approve the Comprehensive Annual Financial Report for the year ending June 30, 2019, now on file in Business Services. Donna Tyner seconded and the motion passed unanimously by a vote of 7 to 0 by Becky Tymchuk, Eric Simpson, Anne Bryan, Susan Greenberg, Donna Tyner, LeeAnn Larsen and Tom Colett.

A. Consent Agenda – Becky Tymchuk

1. Personnel

BE IT RESOLVED that the employee(s) who are recommended herein for administrator and teacher elections, leaves of absence, and resignations/terminations are accepted by the School Board as submitted at this meeting.

2. Approval of School Board Meeting Minutes

BE IT RESOLVED that the minutes for the November 18, 2019 Business meeting are hereby approved.

3. Grant Report

BE IT RESOLVED that the Grant report be and hereby is approved as submitted.

4. Appointment of Custodians of School Funds

BE IT RESOLVED that the School Board designates Supt. Don Grotting, Associate Supt. Michael Schofield, Finance Manager Jason Guchereau and Treasury Specialist Tracy Westerfield as Custodians of School Funds for the 2019 – 2020 fiscal year. Furthermore, in accordance with the provisions of ORS 328.445, School District obligations may be paid by check bearing the original signature of any Custodian of School Funds or the Custodian's facsimile signature. Alternatively, School District obligations may be paid by bank wire transfer.

5. Appointment of Budget Officer

BE IT RESOLVED that Michael Schofield is hereby designated the Budget Officer for Beaverton School District for the fiscal year 2019 – 2020.

6. Public Contracts

BE IT RESOLVED that the School Board authorizes the Superintendent or a designee to obligate the District for the public contract items as submitted at this meeting.

LeeAnn Larsen made the motion to adopt the Consent Agenda. Donna Tyner seconded and the motion passed unanimously by a vote of 7 to 0 by Becky Tymchuk, Eric Simpson, Anne Bryan, Susan Greenberg, Donna Tyner, LeeAnn Larsen and Tom Colett.

BOARD COMMUNICATION – Board Members

A. Individual School Board Member Comments

- Becky Tymchuk – appreciates how professional everyone is with all the additional meetings that are taking place. She encouraged everyone to rest and relax during the upcoming winter break.
- Donna Tyner attended lunch at the Stand for Children “Beat the Odds Luncheon”.

- Anne Bryan appreciated hearing about how to better support our Special Ed staff. The Finance and Strategy committee is looking at the reserves policy and has a recommendation coming to the policy committee in January. They are having discussions about a future bond. There is a need to build up trust within the community first.
- Eric Simpson – The Finance and Investment committee met this evening and held a discussion on when the best time would be to go out for a bond.
- LeeAnn Larsen wanted to acknowledge support for the Five Oaks staff. She highlighted the focus groups taking place in January on mental health behavior.
- Tom Colett recently took part in MOCK interviews at ACMA. He also visited Chehalem Elementary School this month.

ADJOURNMENT

Becky Tymchuk adjourned the meeting at 9:04 p.m.

INFORMATION ITEMS

- Bond Program Status Report
- II/IIA AR Instructional Materials Selection
- Community Partnership Team Reports

Submitted by

Mary Hawkins

Mary Hawkins

Becky Tymchuk

Becky Tymchuk, School Board Chair



GRANT REPORT

Grant Proposal	Funding Agency	Amount Requested	Submission Date	Decision Date	Action Required

Grant Proposal In Review	Funding Agency	Amount Requested	Submission Date	Decision Date

Grant Proposal Final Status	Funding Agency	Amount Requested	Amount Funded
ESEA Title Funds	Oregon Dept. of Education	\$8,606,695	\$8,606,695

RECOMMENDATION:

It is recommended that the proposals be approved.

District Goal: WE empower all students to achieve post-high school success.

The District prohibits discrimination and harassment based on any basis protected by law, including but not limited to, an individual's actual or perceived race, color, religion, sex, sexual orientation, gender identity, gender expression, national or ethnic origin, marital status, age, mental or physical disability, pregnancy, familial status, economic status, veteran status, or because of a perceived or actual association with any other persons within these protected classes.



**PUBLIC CONTRACTS – BOARD AUTHORIZATION OF
SUPERINTENDENT TO OBLIGATE THE DISTRICT**

POLICY ISSUE/SITUATION

School Board action is required to authorize the Superintendent or a designee to obligate the District for the attached public contract items.

BACKGROUND INFORMATION

On May 15, 2017, the Board adopted current policy language regarding Authority to Obligate the District (Board Policy DJ), which updates the School District’s Public Contracting Rules in accordance with State Recommended Model Rules. Appropriate bidding procedures and Public Contracting Rules have been complied with before recommending the attached contract for Board approval. The following authorization of contract, subject to available budget appropriations, is a routine Board action that appears under the consent grouping of the Board agenda.

RECOMMENDATION

BE IT RESOLVED that the School Board authorize the Purchasing Manager or a designee to obligate the District for the public contract items listed in Attachment A.

PUBLIC CONTRACTS
 BOARD AUTHORIZATION OF SUPERINTENDENT TO
 OBLIGATE THE DISTRICT
 SUBMITTED FOR SCHOOL BOARD APPROVAL

Contract Name	Recommended By	Contract Selection Process	Contractor/Vendor	Contract Amount	Contract Timeline		Recommendation
					Start	End	
Highland Park/Whitford HVAC	Aaron Boyle	Request for Proposal (RFP) 19-0025	Inline Commercial Construction	\$3,722,365.00	09/2019	10/2020	Authorization to Amend Contract to Inline Commercial Construction to establish GMP for Highland Park HVAC



PROJECT NAME: Highland Park & Whitford HVAC

PROJECT TIMELINE: 4/2018 – 10/2020

PROJECT BUDGET: \$7,926,500.00

PROJECT SCOPE: HVAC Upgrades

CONTRACT NAME: Highland Park HVAC GMP

RECOMMENDED BY: Aaron Boyle

SOLICITATION METHOD: Request for Proposal (RFP) 19-0025

CONTRACT TIMELINE: 9/2019 – 10/2020

CONTRACT AMOUNT: \$3,722,365.00

CONTRACT SCOPE: Highland Park HVAC Upgrades

RECOMMENDATION: Authorization to Amend Contract to Inline Commercial Construction to establish GMP for Highland Park HVAC.

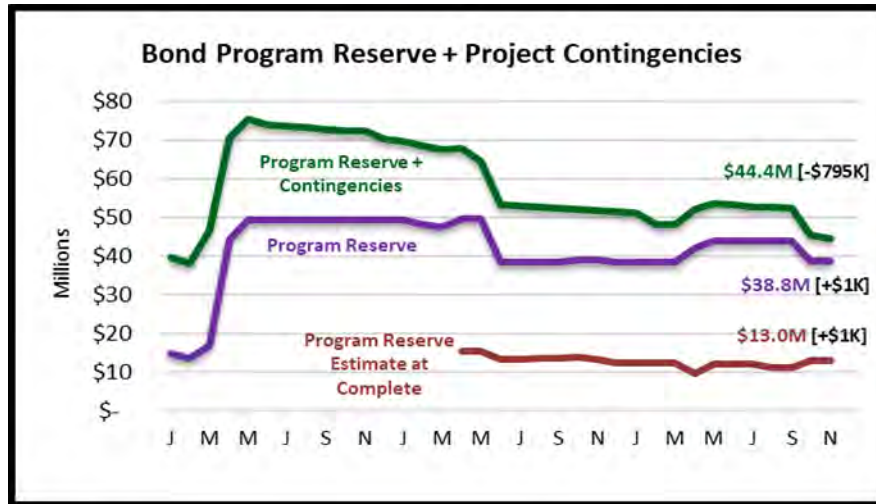
FUNDING SOURCE: 2014 Bond; Modernization, Renovation Projects; Physical Facility Improvements; Highland Park & Whitford HVAC

Bond Program Status Report

Through November 2019

2014 Bond Program Executive Summary

November 2019



Bond Program Reserve = Funding available to the Bond Program but not yet allocated to a project
 Project Contingencies = Funding contained within an approved project budget

Bond Program Funding Total	\$	806,803,383
Revised Approved Current Budget	- \$	768,024,648
Bond Program Reserve	\$	38,778,735
Bond Program Reserve	\$	38,778,735
Net Contingency Balance	+ \$	5,622,680
Bond Program Reserve + Contingencies	\$	44,401,415
Bond Program Funding Total	\$	806,803,383
Program Estimate at Complete (EAC)	- \$	793,824,648
Projected Program Reserve Estimate at Complete	\$	12,978,735

Overall Program Perspective

MWSDVE Change:

Consultants: -0.1%; Contractors: no change; Apprenticeship: no change

MWSDVE Participation:

Consultants: 14.8%; Contractors: 13.3%; Apprenticeship: 20%

Budget Perspective

This month the overall Program Reserve increased by +\$1K, while the Reserve + Project Contingencies decreased by (\$795K). All projects remain within their current approved budgets. Primary cost events were:

- ACMA's current contingency decreased by \$615K due to unforeseen site conditions involving the removal of soft soils and an abandoned underground oil tank.
- Miscellaneous contingency changes occurred on several projects and resulted in a total forecasted contingency decrease of \$180K.
- West TV Roof's current budget increased by \$557K, as approved by the Chief Facilities Officer in accordance with the Cost Management and Control Plan. The budget increase was necessary to cover final water and mold remediation costs. Staff have submitted an insurance claim with the general contractor to recoup costs.
- Raleigh Park HVAC and Electrical's estimate at complete increased by \$827K based on current project cost estimates.

Schedule Perspective

- Design is in full swing on several projects for Summer 2020, and staff are preparing for a busy bidding season. The team is hoping to hit the market early and have most major construction contracts in place by March.
- Site work continues at ACMA. First slab pours have been completed, and underground utility work is in progress.
- Five Oaks' Phase 5 (west classroom wing) work is ongoing, and Phase 6 (special education wing) early demo has begun.
- Phase 2 surveys for the Interior Classroom Locks project are ongoing. The surveys should be completed by early-January, at which point the team will analyze the results and begin planning/scheduling the work.
- A contract is in place for cameras at the high schools as part of the Security Upgrades project. Work is set to begin over Winter Break.

2020 Project List from the 2014 Capital Construction Bond

Project Name	Scope Summary	Procurement Type	Current Budget	Construction Start	Construction Finish
ACMA	(Continued) Demolition and replacement of existing building	Design - Bid - Build	\$37,570,155.00	7/2019	6/2021
Aloha High School (HS) Seismic	(Continued) Seismic structural upgrades; building re-roof	CM/GC	\$19,339,227.00	6/2019	8/2020
Auditorium Upgrades	(Continued) Auditorium upgrades across District HS; includes: stage rigging (1), step/aisle lighting (multiple), misc. safety upgrades (1), production lighting (1)	Design - Bid - Build	\$6,475,346.00	8/2017	8/2020
Barnes Elementary School (ES) HVAC/Roof	HVAC upgrade; building re-roof	Design - Bid - Build	\$1,088,000.00	6/2020	8/2020
Beaver Acres ES Seismic	Seismic structural upgrades; building re-roof; building re-pipe; window replacements	CM/GC	\$7,137,783.00	6/2020	8/2020
Conestoga Middle School (MS) Clocks	Replacement of building clocks	Design - Bid - Build	\$75,000.00	6/2020	8/2020
Errol Hassell ES Restroom Remodel	Remodel of modular student restrooms	Design - Bid - Build	\$856,000.00	6/2020	8/2020
Five Oaks	(Continued) Building renovation	CM/GC	\$28,001,419.00	6/2018	8/2020
Highland Park MS HVAC	HVAC upgrade	CM/GC	\$2,874,000.00	6/2020	9/2020
Hiteon ES HVAC	HVAC controls upgrade	Design - Bid - Build	\$500,000.00	6/2020	8/2020
Hiteon ES Paging	Paging improvements	Design - Bid - Build	\$12,000.00	6/2020	8/2020
McKay ES Clocks	Replacement of building clocks	Design - Bid - Build	\$38,000.00	6/2020	8/2020
Mountain View MS Clocks	Replacement of building clocks	Design - Bid - Build	\$75,000.00	6/2020	8/2020
Nancy Ryles ES Playground	Playground structure improvements	Design - Bid - Build	\$70,000.00	6/2020	8/2020
Oak Hills ES Restroom Remodel	Remodel of student (2 sets) and staff (2 sets) restrooms	Design - Bid - Build	\$849,000.00	6/2020	8/2020
Raleigh Hills ES Freezer Replacement	Kitchen walk-in freezer replacement	Design - Bid - Build	\$300,000.00	6/2020	8/2020
Raleigh Park ES HVAC/Electrical	HVAC and Electrical upgrades	Design - Bid - Build	\$2,420,000.00	6/2020	9/2020
Raleigh Park ES Sewer	Replacement of existing sewer line	Design - Bid - Build	\$250,000.00	6/2020	9/2020
Rock Creek ES Flooring	Replacement of existing gym and hallway flooring	Design - Bid - Build	\$136,000.00	6/2020	8/2020
Security Upgrades Interior Locks	(Continued) Replacement of current door hardware with push button locks; additional areas of refuge currently being scoped	Design - Bid - Build	\$2,000,000.00	8/2018	TBD
Security Upgrades	(Continued) Installation of cameras and fencing at HS; Phase 4 perimeter hardening	Multiple	\$14,601,033.00	9/2015	8/2020
Terra Linda ES Re-pipe/Restroom Remodel	Domestic water re-pipe; remodel of student bathrooms	Design - Bid - Build	\$1,736,000.00	6/2020	9/2020
Whitford MS HVAC/Roof	HVAC upgrade; building re-roof	CM/GC	\$5,052,500.00	6/2020	9/2020

District Goal: WE Empower all students to achieve post-high school success.

"The District prohibits discrimination and harassment based on any basis protected by law, including but not limited to, an individual's actual or perceived race, color, religion, sex, sexual orientation, gender identity, gender expression, national or ethnic origin, marital status, age, mental or physical disability, pregnancy, familial status, economic status, veteran status, or because of a perceived or actual association with any other persons within these protected classes."

School Bond Program 2020 Activity Map

November 14, 2019

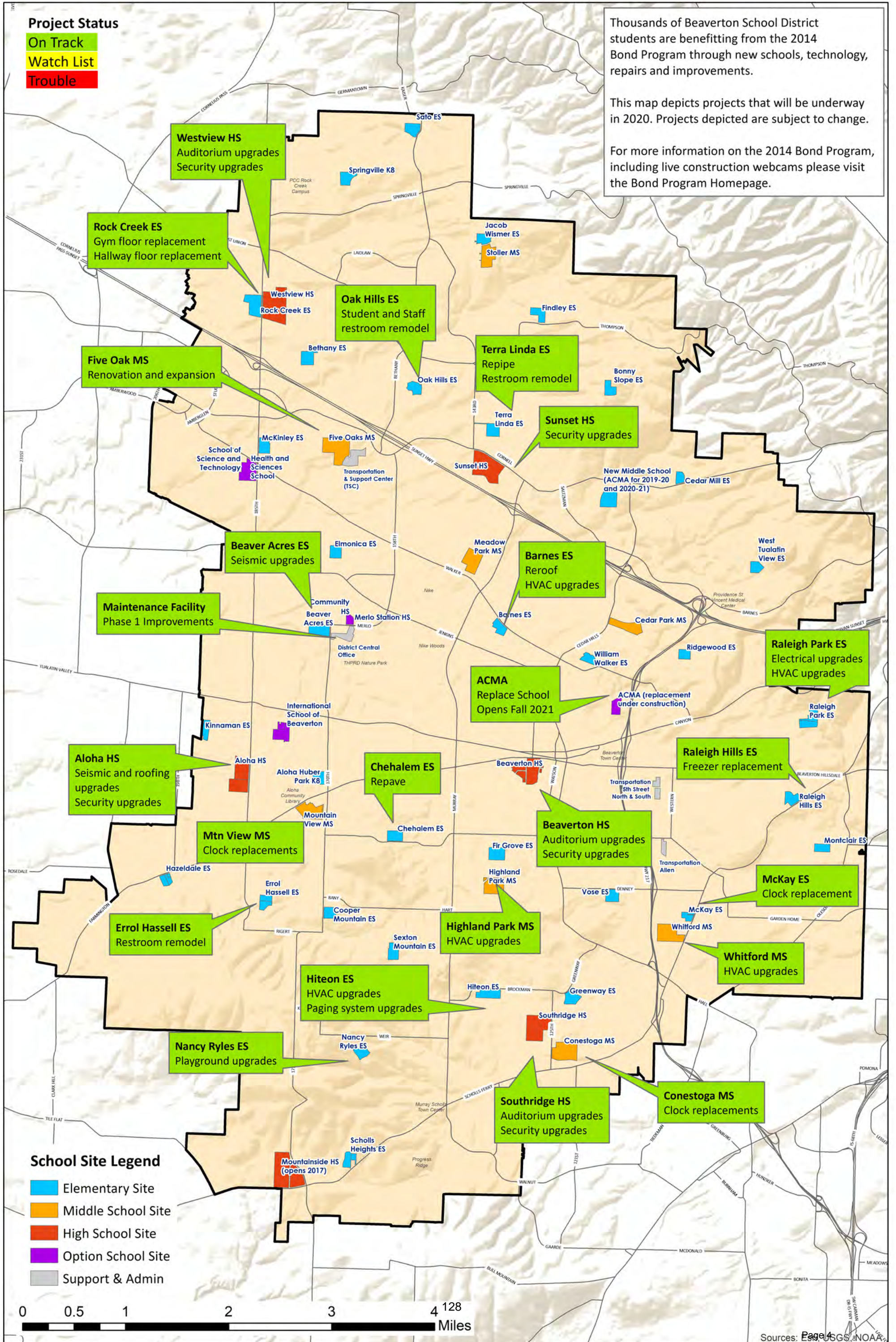
Project Status

- On Track
- Watch List
- Trouble

Thousands of Beaverton School District students are benefitting from the 2014 Bond Program through new schools, technology, repairs and improvements.

This map depicts projects that will be underway in 2020. Projects depicted are subject to change.

For more information on the 2014 Bond Program, including live construction webcams please visit the Bond Program Homepage.



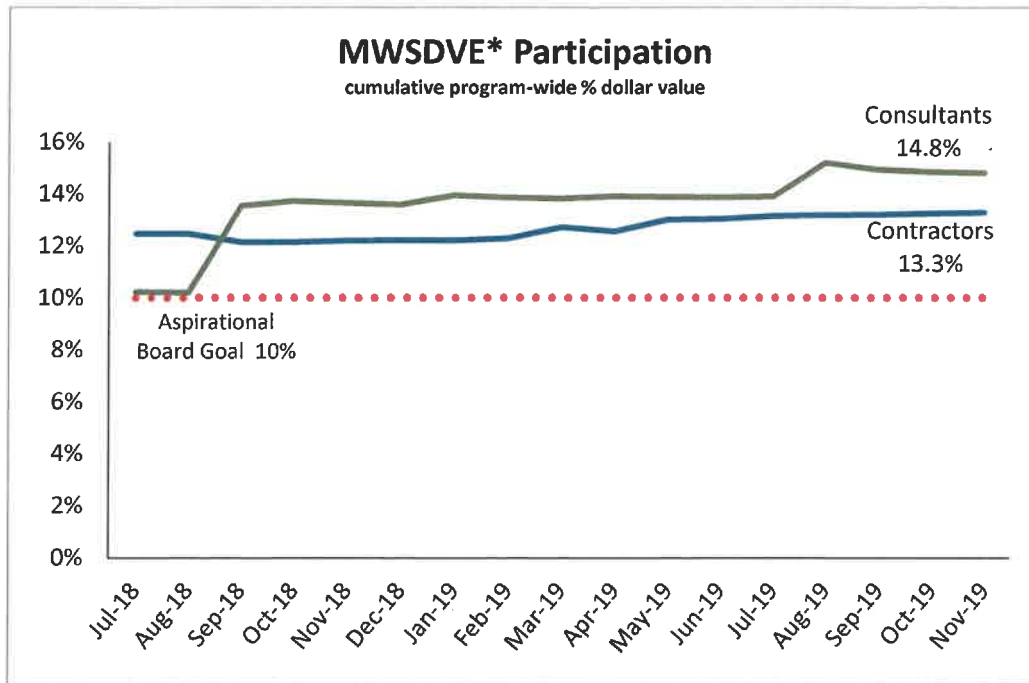
November 2019

Performance Key	
Green = On Track	
Yellow = Watchlist	
Red = Trouble	
Gray = Milestone Complete	
(Date) = Target	
Date = Actual	
N/A = Not Applicable	

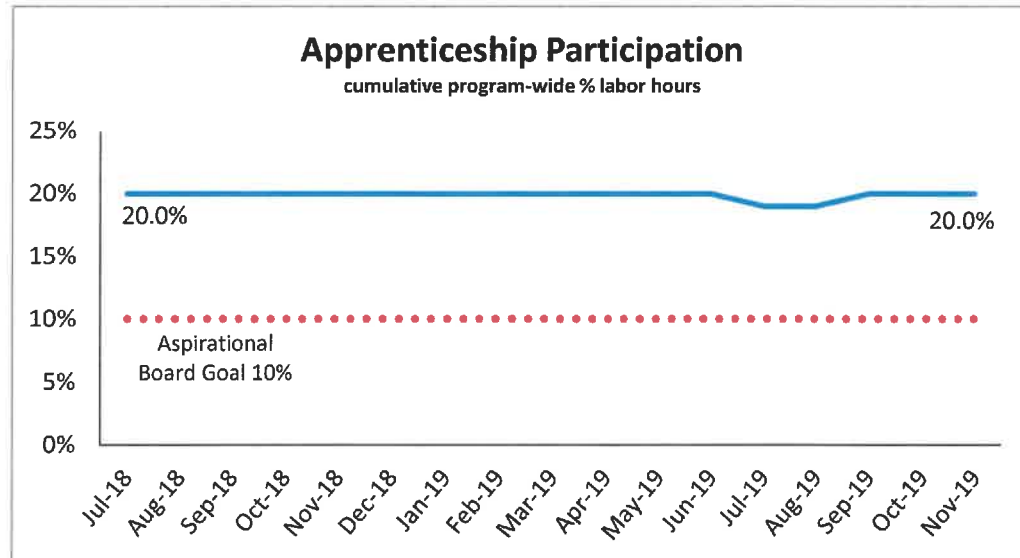
Current Performance Metrics	William Walker Replacement	ACMA Replacement	Five Oaks Renovation	Maintenance Facility	Aloha High School Seismic & Roofing	Highland Park & Whitford HVAC	West TV Roof	Cedar Mill Roof & HVAC	Beaver Acres Seismic & Renovation	Raleigh Park HVAC & Electrical	Barnes Roof & HVAC	Terra Linda Repipe
Overall Budget Performance	On Track	On Track	Watchlist	On Track	On Track	Watchlist	On Track	On Track	On Track	Watchlist	On Track	On Track
Budget Percent Complete	91.00%	22.00%	65.00%	76.00%	27.00%	4.00%	54.00%	72.00%	0.00%	2.00%	1.00%	4.00%
Overall Schedule Performance	On Track	On Track	On Track	On Track	On Track	On Track	On Track	On Track	On Track	On Track	On Track	On Track
Schedule Percent Complete	99.00%	26.00%	59.00%	60.00%	35.00%	0.00%	95.00%	99.00%	0.00%	0.00%	0.00%	0.00%
Schedule Milestones	William Walker Replacement	ACMA Renovation	Five Oaks Renovation	Maintenance Facility	Aloha High School Seismic & Roofing	Highland Park & Whitford HVAC	West TV Roof	Cedar Mill Roof & HVAC	Beaver Acres Seismic & Renovation	Raleigh Park HVAC & Electrical	Barnes Roof & HVAC	Terra Linda Repipe
Design Team Contracted	11-2016	5-2016	6-2016	6-2016	9-2018	9-2018	11-2018	9-2018	8-2019	8-2019	8-2019	7-2019
Design - Schematic Design	6-2017	3-2018	10-2017	3-2017	11-2018	10-2018	12-2018	10-2018	10-2019	(12-2019)	10-2019	9-2019
Design - Design Development	8-2017	8-2018	11-2017	10-2018	1-2019	11-2018	1-2019	11-2018	11-2019	(1-2020)	11-2019	(1-2019)
Design - Construction Documents	10-2017	2-2019	5-2018	1-2019	3-2019	3-2019	2-2019	1-2019	(1-2020)	(2-2020)	(12-2019)	(1-2020)
Permitting - Land Use	9-2017	1-2019	3-2018	1-2019	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A
Permitting - Site Development	7-2018	5-2019	7-2018	4-2019	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A
Permitting - Building	8-2018	7-2019	6-2018	4-2019	11-2019	(5-2020)	8-2019	5-2019	(5-2020)	(6-2020)	(5-2020)	(6-2020)
Construction - Contract Award	1-2018	5-2019	9-2017	7-2017	2-2019	8-2019	7-2019	3-2019	(2-2020)	(2-2020)	(2-2020)	(3-2020)
Construction - Start	5-2018	7-2019	6-2018	3-2019	6-2019	(6-2020)	8-2019	6-2019	(6-2020)	(6-2020)	(6-2020)	(6-2020)
Construction - Finish	8-2019	(8-2021)	(8-2020)	(8-2020)	(8-2020)	(9-2020)	10-2019	8-2019	(8-2020)	(8-2020)	(8-2020)	(9-2020)
Owner Activities - FF&E Ordered	3-2019	(2-2021)	3-2019	N/A	N/A	N/A	N/A	N/A	(6-2020)	N/A	N/A	N/A
Owner Activities - FF&E Delivered	8-2019	(5-2021)	(8-2020)	N/A	N/A	N/A	N/A	N/A	(8-2020)	N/A	N/A	N/A
Owner Activities - Occupancy	8-2019	(6-2021)	(8-2020)	(8-2020)	(8-2020)	(9-2020)	10-2019	8-2019	(8-2020)	(9-2020)	(9-2020)	(9-2020)
Project Complete (Month - Year)	8-2019	(8-2021)	(8-2020)	(8-2020)	(8-2020)	(8-2020)	10-2019	8-2019	(8-2020)	(9-2020)	(9-2020)	(9-2020)
Equity Goals												
Participation	Target %	Current %	Change %									
MWSDVE - Consultants	10.0%	14.8%	-0.10%									
MWSDVE - Contractors	10.0%	13.3%	No change									
Apprenticeship	10.0%	20.0%	No change									

2014 Construction Bond Program

Equity Performance November 2019 Report



*Minority, Women and Service Disabled Veteran Owned Enterprises



2014 Bond Program Financial Status Report

Financial Summary

Data as of November 30, 2019

Project List	Original Budget Allocations	Revised Approved Current Budget	Oct-19 Est @ Comp	Nov-19 Est @ Comp	Net Contingency Balance		Budget Summary Notes	
ACMA Replacement	\$ 28,300,000	\$ 37,570,155	\$ 37,570,155	\$ 37,570,155	\$ 3,161,284	9.2%	Current contingency decreased by (\$615K) due to unforeseen soft soils and underground oil tank removal	
AHS Title IX Compliance	\$ 2,000,000	\$ 3,453,433	\$ 3,453,433	\$ 3,453,433			Completed; Final Cost	
Capital Center Improvements & Data Center	\$ 5,000,000	\$ 12,820,187	\$ 12,820,187	\$ 12,820,187			Completed; Final Cost	
District-Wide ADA Compliance	\$ 2,000,000	\$ 2,000,000	\$ 2,000,000	\$ 2,000,000			Projects in Process	
District-Wide Communication System	\$ 7,200,000	\$ 5,282,072	\$ 5,282,072	\$ 5,282,072			Completed; Final Cost	
District-Wide Facility Repairs	\$ 98,000,000	\$ 95,153,426	\$ 120,906,424	\$ 120,953,426			Current budget increased by +\$47K due to additional SB1149 reimbursement	
District-Wide HVAC Controls	\$ 800,000	\$ 800,000	\$ 800,000	\$ 800,000			Projects in Process	
Domestic / Fire Line Separation	\$ 800,000	\$ 977,120	\$ 977,120	\$ 977,120				
Five Oaks MS Renovation & Expansion	\$ 21,100,000	\$ 28,001,419	\$ 28,001,419	\$ 28,001,419	\$ 75,202	0.3%		
Green Energy Technology	\$ 5,000,000	<i>(Budget Moved to Other Projects)</i>						Scope completed via new schools and rebuilds
Hazeldale K-5 Replacement	\$ 24,600,000	\$ 31,756,091	\$ 31,756,091	\$ 31,756,091	\$ 120,024		In Close-Out; Construction Completed 2018	
IT Data Center @ Capital Center	\$ 2,900,000	<i>(Budget Moved to CC Project)</i>						Scope completed via Capital Center Improvements
Kitchen Improvements	\$ 800,000	\$ 977,120	\$ 977,120	\$ 977,120			Projects in Process	
Land for new K-5 @ So. Cooper Mountain	\$ 3,000,000	\$ 7,800,000	\$ 7,800,000	\$ 7,800,000			In Close-Out; Purchase completed 2019	
Maintenance Facility Improvements Phase I	\$ 10,000,000	\$ 11,263,990	\$ 11,263,990	\$ 11,263,990	\$ 179,948	1.6%		
McKay ADA Improvements	\$ 400,000	\$ 634,540	\$ 634,540	\$ 634,540			Completed; Final Cost	
New HS: Mountainside	\$ 109,000,000	\$ 184,135,294	\$ 184,135,294	\$ 184,135,294	\$ 322,070		In Close-Out; Construction Completed 2017	
New ES: Sato K5	\$ 25,000,000	\$ 38,175,000	\$ 38,175,000	\$ 38,175,000	\$ 83,666		In Close-Out; Construction Completed 2017	
New MS @ Timberland	\$ 51,600,000	\$ 61,371,096	\$ 61,371,096	\$ 61,371,096	\$ 261,073		Construction completed 2016; remaining budget reserved for final outfitting	
Raleigh Hills K-8 Improvements	\$ 9,700,000	\$ 1,419,490	\$ 1,419,490	\$ 1,419,490			Completed; Final Cost	
Raleigh Hills K-8 Improvements (Funding Hold)	\$ -	\$ 11,821,753	\$ 11,821,753	\$ 11,821,753				
Security Upgrades	\$ 10,000,000	\$ 14,621,670	\$ 14,621,670	\$ 14,621,670				
Seismic Upgrades	\$ 4,200,000	\$ 22,659,638	\$ 22,659,638	\$ 22,659,638				

2014 Bond Program Financial Status Report
Financial Summary

Data as of November 30, 2019

Project List	Original Budget Allocations	Revised Approved Current Budget	Oct-19 Est @ Comp	Nov-19 Est @ Comp	Net Contingency Balance		Budget Summary Notes
SHS Title IX Compliance	\$ 2,000,000	\$ 4,285,317	\$ 4,285,317	\$ 4,285,317			Completed; Final Cost
Springville K-8 Improvements	\$ 2,000,000	\$ 510,016	\$ 510,016	\$ 510,016			Completed; Final Cost
Vose K-5 Replacement	\$ 24,800,000	\$ 33,846,280	\$ 33,846,280	\$ 33,846,280			Completed; Final Cost
William Walker K-5 Replacement	\$ 24,600,000	\$ 36,684,200	\$ 36,684,200	\$ 36,684,200	\$ 1,419,413	4.0%	
Added Projects	\$ -	\$ 4,016,007	\$ 4,016,007	\$ 4,016,007			
Program Contingency	\$ 45,400,000						
Program Inflation	\$ 52,800,000						
Pre-Bond Expenditure Reimbursements	\$ 1,000,000	\$ 998,828	\$ 998,828	\$ 998,828			Completed; Final Cost
Bond Management Costs	\$ 20,000,000	\$ 30,990,506	\$ 30,990,506	\$ 30,990,506			
Bond Issuance Costs	\$ 6,000,000	\$ 4,000,000	\$ 4,000,000	\$ 4,000,000			
Construction Subtotal	\$ 600,000,000	\$ 688,024,648	\$ 713,777,646	\$ 713,824,648	\$ 5,622,680		
Learning Technology	\$ 56,000,000	\$ 56,000,000	\$ 56,000,000	\$ 56,000,000			
Critical Equipment	\$ 24,000,000	\$ 24,000,000	\$ 24,000,000	\$ 24,000,000			
Tech & Equip Subtotal	\$ 80,000,000	\$ 80,000,000	\$ 80,000,000	\$ 80,000,000			
Grand Totals	\$ 680,000,000	\$ 768,024,648	\$ 793,777,646	\$ 793,824,648	\$ 5,622,680		Contingency Balance change of (\$797K)
Added Funding to Bond Program							
Bond Premium (First Bond Sale)	\$ 63,295,961						
Bond Premium (Second Bond Sale)	\$ 30,270,107						
Interest Earnings (First Bond Sale)	\$ 5,340,214						
Interest Earnings (Second Bond Sale)	\$ 13,236,261						
Other Additional Funding (see Tab)	\$ 14,660,840						
Grand Total Added Funding	\$ 126,803,383						
GRAND TOTAL 2014 BOND FUNDING	\$ 806,803,383						Total Funding increased by +\$48K
Program Reserve		\$ 38,778,735	\$ 12,977,365	\$ 12,978,735			Program Reserve change of +\$1K
Program Reserve + Project Contingencies						\$ 44,401,415	Change of (\$795K)

2014 Bond Program Financial Status Report
Additional Funding Allocations to Bond Program

Data as of November 30, 2019

Source	Funding	Assigned to Projects	Assigned to Program Reserve	Budget Summary Notes
Remaining 2006 Bond Savings	\$ 576,615	Mountainside HS	\$ -	
Capital Center Rent Revenue Balance	\$ 433,385	Mountainside HS	\$ -	
Construction Excise Tax Revenue	\$ 1,130,655	Capital Center	\$ -	
Construction Excise Tax Revenue forecasted to 2021	\$ 5,021,577		\$5,021,577	
THPRD reimb.	\$ 449,783		\$ 449,783	
SB 1149 reimb.	\$ 2,404,047	District-wide Repairs	\$ -	
ETO reimb.	\$ 1,117,272	District-wide Repairs	\$ 1,067,611	
Facility grants	\$ 3,027,507		\$ 3,027,507	
Sato: TVWD Reimbursement	\$ 500,000	Sato K-5	\$ -	
TOTAL	\$14,660,840		\$9,566,478	

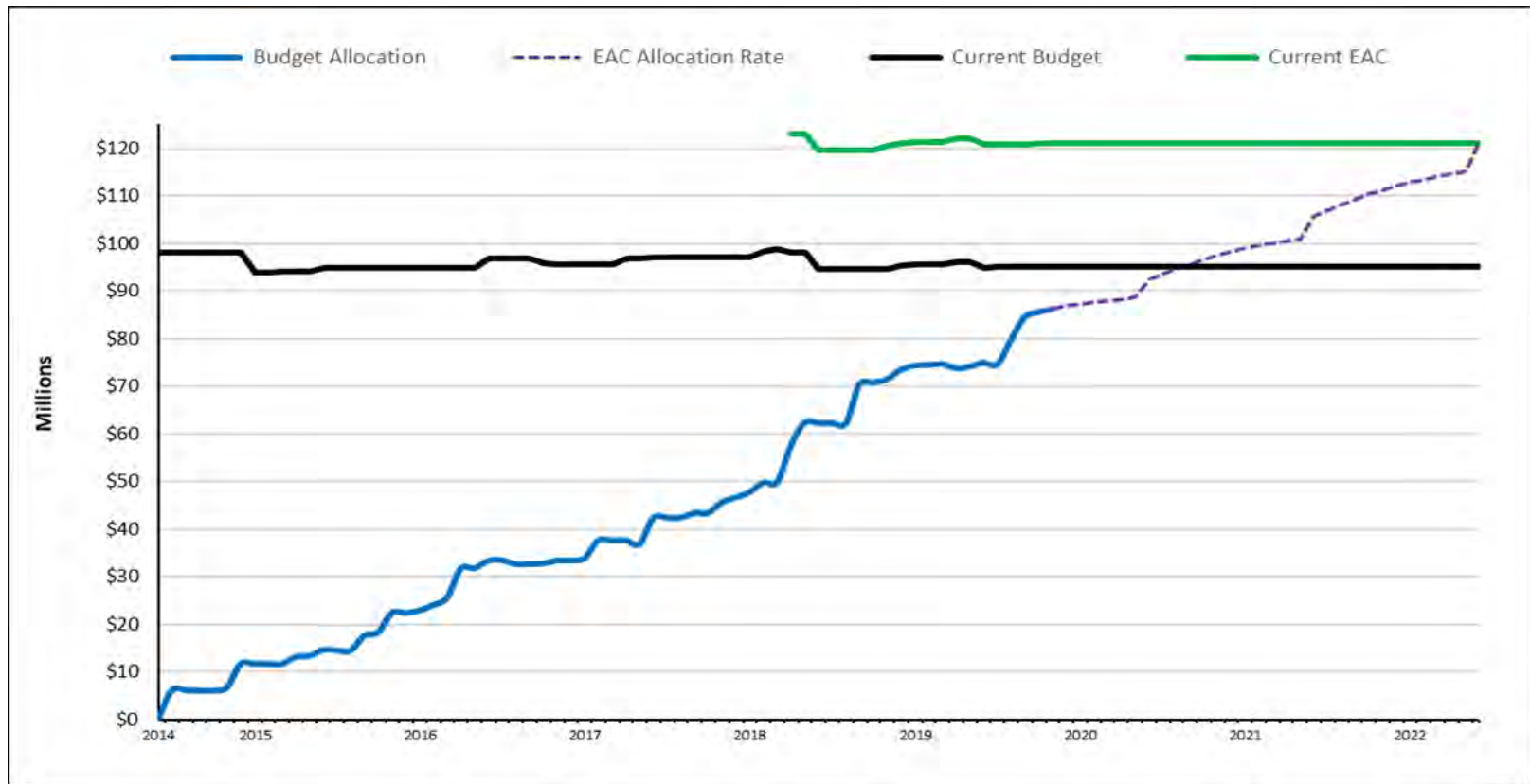
District-Wide Repair Projects

"The \$98M"

Project	Initial Budget	Revised Approved Current Budget	Oct-19 Est @ Comp	Nov-19 Est @ Comp	Net Contingency Balance	Budget Summary Notes
Completed Projects	\$ 20,368,895	\$ 42,035,548	\$ 33,780,734	\$ 42,035,549		Completed; Final Cost
Mountain View Roof	\$ 1,245,000	\$ 3,773,284	\$ 4,185,000	\$ 3,773,284	Completed; Final Cost	
Ridgewood HVAC and Electrical	\$ 829,173	\$ 4,481,531	\$ 4,563,774	\$ 4,481,531	Completed; Final Cost	
Projects in Close-out	\$ 5,765,010	\$ 16,696,848	\$ 24,888,454	\$ 16,433,210	\$ 948,094 6.0%	West TV Roof Current Budget increased by +\$557K after receiving the final water and mold remediation costs. Staff have submitted an insurance claim with the general contractor to recoup costs.
District-Wide Auditorium Upgrades	\$ 4,384,538	\$ 6,475,346	\$ 6,475,346	\$ 6,475,346		
Highland Park & Whitford HVAC	\$ 1,402,000	\$ 7,926,500	\$ 7,926,500	\$ 7,926,500	\$ 37,965 0.5%	
HVAC Controls User Interface Upgrade	\$ 180,000	\$ 180,000	\$ 180,000	\$ 180,000		
New Schools Post-Warranty Fund	\$ -	\$ 150,000	\$ 150,000	\$ 150,000		
Barnes Roof & HVAC	\$ 592,000	\$ 1,088,000	\$ 1,088,000	\$ 1,088,000	\$ 108,800 11.1%	
Raleigh Park HVAC & Electrical	\$ 437,000	\$ 2,420,000	\$ 2,420,000	\$ 3,247,000	\$ 240,000 11.0%	Current estimate at complete increased by +\$27K based on current project cost estimates
Raleigh Park Sewer	\$ 47,000	\$ 250,000	\$ 250,000	\$ 250,000		0.0%
Terra Linda Repipe and Restroom Remodel	\$ 1,068,000	\$ 1,736,000	\$ 1,736,000	\$ 1,736,000	\$ 173,600 11.1%	
Maint Dept Repair & Improvement Projects*	\$ 6,754,138	\$ 6,757,228	\$ 6,754,138	\$ 6,757,228		
Repair Projects Total	\$ 40,998,582	\$ 85,715,471	\$ 85,649,173	\$ 86,278,833		
Repair Program Balance Available	\$ 57,001,418	\$ 9,437,955	\$ 9,457,251	\$ 8,874,593		
Repair Program EAC Balance	\$ -	\$ -	\$ 25,800,000	\$ 25,800,000		
Repair Program Budget (Less Transfers In/Out)	\$ 98,000,000	\$ 95,153,426	\$ 120,906,424	\$ 120,953,426		
*Budget and Est @ Comp. will increase each month as additional Maintenance Dept. managed Repair Projects are scheduled.						
Transfer Tracking						
Initial Budget	\$ 98,000,000					
SHS Repairs	\$ (1,881,416)					
SHS Emergency Elect	\$ 745,833					
Capital Center Building Repairs	\$ (2,280,000)					
Capital Center Building Repairs	\$ 1,090,725					
Transfer From District Wide Communications System	\$ 81,970					
SB 1149 Reimbursements	\$ 2,404,047					
ETO Reimbursements	\$ 49,661					
Additional Funding - Bethany Repipe - Approved 2.6.18	\$ 1,200,000					
AHS Roofing transferred to AHS Seismic	\$ (4,053,000)					
Door Replacement(s) transferred to Security Upgrades	\$ (9,446)					
Additional Funding - AHP Roof - Approved 12.13.18	\$ 650,000					
Transfer from Seismic Upgrades - Cedar Mill	\$ 166,052					
Transfer from contingencies for Post-Warranty Fund	\$ 150,000					
Cooper Mnt Roofing transferred to Cooper Mnt Seismic	\$ (128,000)					
Beaver Acres Roofing transferred to Beaver Acres Seismic	\$ (1,138,000)					
Additional Funding - Hiteon Flood Rebuild - Approved 7.24.19	\$ 105,000					
Balance	\$ 95,153,426					

2014 Bond Program Financial Status Report
District-Wide Repair Projects Budget Allocation Rate

Data as of November 30, 2019



2014 Bond Program Financial Status Report
Seismic Projects

Data as of November 30, 2019

Seismic Projects	Original Budget	Revised Approved Current Budget	Oct-19 Est @ Comp	Nov-19 Est @ Comp	Net Contingency Balance	Budget Summary Notes	
A/E Scoping/Surveys	\$ -	\$ 222,058	\$ 222,058	\$ 222,058	\$ -	In Close-Out; Study completed 2019	
Aloha HS	\$ 1,732,898	\$ 19,339,227	\$ 19,339,227	\$ 19,339,227	\$ 1,399,271	7.8%	
Beaver Acres ES	\$ 1,714,444	\$ 7,137,783	\$ 7,137,783	\$ 7,137,783	\$ 716,800	11.2%	
Beaverton HS	\$ 246,184	<i>(Budget Transferred to Aloha HS)</i>					Scope completed via BHS Gym Ceiling project
Cedar Mill ES	\$ 144,771	<i>(Budget Moved to Facility Repairs)</i>					Scope completed via Cedar Mill Roof & HVAC project
Cooper Mt. ES	\$ 361,703	\$ 3,320,475	\$ 3,320,475	\$ 3,320,475		Scheduled to begin 2021	
(Projects Financially Complete)							
Seismic Projects Total	\$ 4,200,000	\$ 30,019,543	\$ 30,019,543	\$ 30,019,543			
TAPS Seismic Grant	\$ -	\$ (22,545)	\$ (22,545)	\$ (22,545)			
AHS Seismic Rehabilitation Grant	\$ -	\$ (2,500,000)	\$ (2,500,000)	\$ (2,500,000)			
Beaver Acres Seismic Rehabilitation Grant	\$ -	\$ (2,500,000)	\$ (2,500,000)	\$ (2,500,000)			
Cooper Mnt Seismic Rehabilitation Grant	\$ -	\$ (2,337,360)	\$ (2,337,360)	\$ (2,337,360)			
Seismic Program Bond Cost Balance	\$ 4,200,000	\$ 22,659,638	\$ 22,659,638	\$ 22,659,638			
Seismic Program Less Transfers In/Out	\$ 22,659,638						
The current project budget is fixed at \$22,659,638, which may not match the current estimate at complete. Staff plan on pursuing additional Rehabilitation Grant funds, and there are additional funds/scope to be absorbed from the District-Wide Facility Repair project. Projections for additional funds will be forecasted at a later date (dependent on staff's confidence level) as the project moves between phases.							
Transfer Tracking							
Initial Budget	\$ 4,200,000						
Program Escalation	\$ 1,006,740						
AHS Roofing - From Facility Repairs	\$ 575,193						
Beaver Acres Roofing - From Facility Repairs	\$ 1,138,000						
AHS Roofing - Balance From Facility Repairs	\$ 3,477,807						
Program Reserve - Approved by School Board 6.18.18	\$ 5,450,000						
Transfer to Facility Repairs - Cedar Mill	\$ (166,052)						
Cooper Mnt Roofing - From Facility Repairs	\$ 128,000						
Program Reserve - Approved by School Board 10.28.19	\$ 6,849,950						
Balance	\$ 22,659,638						

2014 Bond Program Learning Technology/Classroom Systems
and Critical Equipment Purchases
November 2019

Data as of November 30, 2019

Learning Technology/Classroom Systems (\$56 Million)						
Project Name	Total Budget Project	% Complete	Project To Date Expenditures	2019-20 Budget	2019-20 Expenditures as of 11/30/2019	Annual Description of Expenditures
Networking Upgrades	\$ 9,132,995	58%	\$ 5,257,364	\$ 430,038	\$ 54,407	Maintaining current wireless networking capacity and addressing specific use cases. For 2019-20, we are expanding wireless access to outdoor spaces at the high schools including athletic fields, press boxes and concession stands. We will be preparing the school layer 2 switch replacement project.
Digital Curriculum Development	\$ 5,382,763	64%	\$ 3,446,826	\$ 716,000	\$ 212,062	Salary for five curriculum developers (5.0 FTE)
Future Ready Schools	\$ 31,485,163	77%	\$ 24,126,620	\$ 5,598,052	\$ 3,239,508	1:1 Chromebook replacement high school students. We are preparing for Chromebook replacement for middle school students and elementary students in grades 3-5.
Technology Modernization	\$ 2,961,479	56%	\$ 1,657,760	\$ 894,744	\$ 91,025	Electrical, physical, and network upgrades at Central Office Data Center. Business Continuity plans continue to be updated yearly. 2019 Security Audit is complete and IT staff are building project plans to address discovered security risks.
Other Technology/Curriculum Projects	\$ 7,037,600	96%	\$ 6,764,505	\$ -	\$ -	Completed Technology/Curriculum Projects. Includes: student laptop replacements in 2014-15, high school science technology in 2015-16, positive change grants 2014-15 through 2016-17.
Learning Technology/ Classroom Systems Total	\$ 56,000,000	74%	\$ 41,253,075	\$ 7,638,834	\$ 3,597,002	

2014 Bond Program Learning Technology/Classroom Systems
and Critical Equipment Purchases
November 2019

Data as of November 30, 2019

Critical Equipment (\$24 Million)						
Project Name	Total Budget Project	% Complete	Project To Date Expenditures	2019-20 Budget	2019-20 Expenditures as of 11/30/2019	Annual Description of Expenditures
Buses	\$ 16,000,000	88%	\$ 14,103,131	\$ 3,763,680	\$ 1,866,811	Approximately \$2 million/year over eight years. In first year, \$4.25 million will be spent and \$2million/year will be spent in years two through five. In year six, approximately \$3.75 million will be spent. \$0 will be spent in the eighth year.
Copiers	\$ 2,343,215	64%	\$ 1,506,993	\$ 350,000	\$ 113,777	Approximately \$375,000/year over eight years.
Athletic Equipment	\$ 1,021,737	16%	\$ 167,764	\$ 203,973	-	Approximately \$100,000/year over three years beginning in year 2. \$75,970 was transferred in year 2 to the Scoreboard Replacements Project. An additional \$800,000 will be split over years six through eight.
Maintenance Equipment	\$ 2,289,219	26%	\$ 585,460	\$ 555,000	\$ 40,460	Approximately \$120,000/year over four years beginning in year 2. Year 2 will have \$185,000. An additional \$1.7 million will be split over the final three years of the bond, beginning in year six.
Early Learning Playground Equipment	\$ 27,366	34%	\$ 9,366	\$ 6,000	-	Playground equipment for Early Learning program at seven elementary schools.
Other Equipment Purchases	\$ 2,318,463	100%	\$ 2,318,462	-	-	Other critical equipment purchases as needed. Purchase of \$15,000 towards new locker banks at Stoller in 14-15, \$250,000 towards new musical instruments in 14-15 and 15-16, \$184,050 for cafeteria table replacements in 15-16, \$1,397,733 for classroom furniture for full day kindergarten in 2015-16, \$344,973 for high school scoreboard replacements in 2015-16 and 2016-17, \$121,066 towards BSD's portion of shock pad installation at SW Quadrant Park with THPRD in 2016-17 and InTouch Printers in 2018.
Critical Equipment Total	\$ 24,000,000	78%	\$ 18,691,176	\$ 4,878,653	\$ 2,021,048	
Grand Total	\$ 80,000,000	75%	\$ 59,944,251	\$ 12,517,487	\$ 5,618,050	
Total Bond Funds Remaining	\$ 20,055,749					

